

Viewing / Editing Schedules -----

The Schedule Views

Your schedules can be displayed and printed in many different views when signed in as a manager. Each view has special functions that can be performed and may be useful at various times. For example, you might prefer to view your schedule graphically but when making changes you might use the **By Employee** view to drag and drop shifts.

[Click here](#) for a chart of functions broken down by Schedule View.

- **By Employee** - Weekly default view. Lists each employee down the left and days across the top. Shows their schedule and hours worked for the week and if the week is published shows if they have viewed of or confirmed receipt of schedule. Allows clicking a cell to quickly add a shift and has a [DRAG & DROP and Undo feature](#) that allows quick changes to shifts (and Ctrl Drag/Drop to copy shifts) for Internet Explorer users. Allows changing the position of a shift by clicking the shift. Used to print individual weekly schedules. This view has many Change Layout options.
- **Calendar*** - Three Calendar views: Daily, Weekly and Monthly Tabs. Displays in a calendar or day planner format The **Calendar Weekly** is one of our most popular views and it can be compressed for printing and can also list shifts sorted by category instead of by position.
- **By Position** - Daily and Weekly tabs. Lists shifts by Position. Shows total shifts and hours for each Position
- **Category Chart*** - Displays time periods between one week, bi-weekly and a month - (most useful if you use Categories, providing a compressed chart)
- **In-Out*** - Displays 1 - 4 weeks. biweekly or a month, shows employees on the left with dates across the top. Shows start time of first shift and end time of last consecutive shift each day. (Useful if you assign multiple consecutive shifts per day to one employee)
- **Sortable List** - Daily or Weekly. List of Shifts can be sorted by any column. Also allows for deleting and unassigning multiple shifts. Can be filtered to show only Unassigned Shifts, Auto-Filled Shifts or Preplaced Shifts
- **Multi-Shift Edit** - Daily or Weekly. List of Shifts can be sorted by any column. Allows editing of multiple shifts at a time. Can be filtered to show only Unassigned Shifts, Auto-Filled Shifts or Preplaced Shifts
- **Graphical*** - Daily or Weekly. Shows shifts in a graphical format similar to a spreadsheet. Layout can be changed to only show certain time period. Shifts can be displayed grouped by Position or Alphabetically by employee.
- **Availability** - Daily. Shows graphically all employees - the shifts they are working along with their work time preferences and time off. Layout can be changed to only show a certain time period - specific time periods can be saved for quick viewing later. Also can be set to show count of employee coverage and availability.

*The "Change Layout" link options (see below) on these views control how employees see that same view when they sign in if your SETTINGS page option is set to allow employees to see everyone's schedule.

To choose a different Schedule View use the Schedule View dropdown menu.


WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW SETTINGS HELP

Mar 19, 2007 04:04pm

Sample Pharmacy
Unpublished Schedule

Live Chat Support
HAVE A QUESTION?

SIGN-OUT

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

1 time off request

Add Shifts

Calendar

By Position

By Employee

Category Chart

In-Out Chart

Sortable List

Multi-Shift Edit

Graphical Availability

Statistics

Change L

(Unassigned Shifts)

John Aaron

Store-Post Office

AutoFill Clear/Delete Save Template Print Publish Export

Week of Aug 13, 2007

UNDO Drag / Drop

Refresh after each change

| | Aug-14 - Tue | Aug-15 - Wed | Aug-16 - Thu | Aug-17 - Fri | Aug-18 - Sat | Aug-19 - Sun |
|---------------------|----------------------------------|----------------------------------|----------------------------------|--------------|--------------|--------------|
| (Unassigned Shifts) | | | | | | |
| John Aaron | 9:30am - 5:30pm Store_Receive | 9:30am - 5:30pm Store_Receive | 9:30am - 5:30pm Store_Receive | | | |

Filtering Schedule Views

Each of these views can be "filtered" to only show certain Positions, Groups of Positions (ex. Locations), Categories, Groups of Categories, etc. The dropdown box will be highlighted to remind you that you are viewing a filtered schedule. After filtering you can perform functions on just those displayed shifts (ex. Import, Clear, Delete, AutoFill etc.)


WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW SETTINGS HELP

Mar 19, 2007 04:04pm

Sample Pharmacy
Unpublished Schedule

Live Chat Support
HAVE A QUESTION?

SIGN-OUT

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

1 time off request

Add Shifts Import Search AutoFill Clear/Delete Save Template Print Publish Export

Week of Aug 13, 2007

UNDO Drag / Drop

Refresh after each change

| | Aug-13 - Mon | Aug-14 - Tue | Aug-15 - Wed | Aug-16 - Thu | Aug-17 - Fri | Aug-18 - Sat | Aug-19 - Sun |
|---------------------|--------------------------------|----------------------------------|----------------------------------|----------------------------------|--------------|--------------|--------------|
| (Unassigned Shifts) | | | | | | | |
| John Aaron | 5pm - 9pm Store-Post Office | 9:30am - 5:30pm Store_Receive | 9:30am - 5:30pm Store_Receive | 9:30am - 5:30pm Store_Receive | | | |

Change Layout

Each Schedule View has a "Change Layout" link in the upper left of the page which allows you to change what is seen on that view and the font sizes etc. Each schedule view has different layout options.

WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW SETTINGS HELP

Mar 19, 2007 04:04pm

Sample Pharmacy
Unpublished Schedule

Live Chat Support
CHAT WITH US LIVE!

SIGN-OUT

Schedule View: By Employee

1 time off request

Add Shifts Import Search

Change Layout

Aug-13 - Mon

(Unassigned Shifts)

John Aaron 5pm - 9pm Store-Post Office

Aaron Abson 9:30am - 5:30pm Store-Receiving

Dean Almanson 9am - 5pm Store-Floor

Configure "By Employee" Schedule View

Screen View

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**

Show employee name on the left (enables Drag & Drop)

Use the Quick Shift Edit and Add boxes

Name Display: First Last

Font Size: Small

Aug-19 - Sun

11am - 5pm Store-Cashier

Related Topics:

- [Filtering the Schedule View/Printout](#)
- [Viewing One or More Locations](#)
- [Standard Views](#)
- [Multi-Shift Edit View](#)
- [Sortable View](#)
- [Availability - Coverage View](#)
- [Change Layout - Fonts, Name Order etc.](#)
- [Chart of Functions in each View](#)

By Employee Schedule View - (Drag & Drop for PC Internet Explorer Users Only)

The **By Employee** Schedule View allows you to quickly make shift changes. This is the preferred view for making schedule changes because the page does not need to reload after each change and you can also use the drag/drop feature to quickly move or add shifts.

You can move a shift by clicking and dragging the shift to another day or employee or to copy a shift by holding down the Ctrl key and clicking/dragging the shift to another day or employee. It also allows you to swap two shifts by dragging and dropping one shift on top of the other shift (you will be asked to confirm swap). To assign an open shift drag an Unassigned shift and drop it onto an employee and day, or you can unassign a shift by dragging an employee's shift and dropping it on the Unassigned row. And you can UNDO any changes made with drag and drop. This can really speed up making changes to your schedule.

On Published weeks you can decide whether or not to send email notifications after each change. Under the "UNDO" button is a checkbox entitled "Send a notification for each change" that is defaulted to your SETTINGS page option for sending notification when Publishing - check the box to have notifications sent after a drag and drop or uncheck the box to have no notifications sent.



WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW SETTINGS HELP

Mar 19, 2007 04:16pm

Sample Pharmacy
Published Schedule

Live Chat Support
CHAT WITH US LIVE! SIGN-OUT

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


1 time off request

Add Shifts Search Save Template Print UnPublish Export

Week of Aug 6, 2007

Change Layout DRAG & DROP shifts to move them to another Employee or day. Drop shift on another shift to swap. [More...](#)

UNDO Drag / Drop
 Send a notification for each change Refresh after each change

| | Aug-6 - Mon | Aug-7 - Tue | Aug-8 - Wed | Aug-9 - Thu | Aug-10 - Fri | Aug-11 - Sat | Aug-12 - Sun |
|---|-------------------------------------|------------------------------------|------------------------------------|--------------------------------------|--------------|--------------|-----------------------------|
| (Unassigned Shifts) | | | | | | | |
| John Aaron  | 5pm - 9pm Store-Post Office | 9:30am - 5:30pm Store-Receiving | 9:30am - 5:30pm Store-Receiving | 9:30am - 5:30pm Store-Receiving | | | |
| Aaron Abson  | 10:30am - 5:30pm Store-Receiving | 9am - 5pm Store-Post Office | | 9am - 5pm Store-Cashier -drawer 1 | | | 11am - 5pm Store-Cashier |

The Drag/Drop feature is currently only available when using Internet Explorer on a PC.

Note: Using this view it may be useful to first filter your view to one position if possible when using drag and drop so you have only the appropriate employees displayed. If you need to drag a shift to a cell off the screen below drag the shift and hold it over the bottom of the screen so that it will scroll down the page.

To use the By Employee Schedule View

From any page

- On the top menu click **SCHEDULES** to go to the Scheduling section
- In the Schedule View dropdown in the upper left choose **By Employee**

Note: If you are not able to drag and drop on this view be sure your **Change Layout** option is checked to "Show employee name on the left (enables Drag & Drop)"

WhenToWork.com HOME **SCHEDULES** EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON HOW SETTINGS HELP

Mar 19, 2007 04:20pm **Sample Pharmacy** Unpublished Schedule **Live Chat Support** HAVE A QUESTION? **SIGN-OUT**

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

1 time off request

Change Layout

Configure "By Employee" Schedule View

Screen View

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**

Show employee name on the left (enables Drag & Drop)

Use the Quick Shift Edit and Add boxes

Name Display: First Last

Font Size: Small

Printout

Show: Description Position Category

Hide workers with no shifts

| | Aug-13 - Mon | Aug-18 - Sat | Aug-19 - Sun |
|---------------------|----------------------------------|--------------|-----------------------------|
| (Unassigned Shifts) | | | |
| John Aaron | 5pm - 9pm Store-Post Office | | |
| Aaron Abson | 9:30am - 5:30pm Store-Receive | | 11am - 5pm Store-Cashier |
| Dean Almanson | 9am - 5pm Store-Floor | | |
| Ron Arno | | | |
| | 1pm - 9pm | | |

To MOVE a shift to another day/employee

On the By Employee schedule view

- Click and hold down the left mouse button on a shift and drag it to another day and/or employee
- Move mouse to the background of an employee row & day, then "drop" the shift by releasing the mouse (note dropping a shift on top of another shift will mean you want to SWAP the shifts instead of just move the shift).
- The schedule will immediately be changed.
- Note you can also drop the shift directly onto the employee's name on the left to have the shift assigned to that employee on the same day.
- If the employee is not set to work that position or is unavailable, you will see an alert and the change will not be made. If adding the shift puts the employee over their maximum hours per week, the shift will be changed but you will see an alert.
- You can click the UNDO Drag/Drop to change the shifts back (UNDO can be used any number of times to undo back the last change you have just made on that week)

UNDO Drag / Drop

DRAG & DROP shifts to move them to another Employee or day.
Drop shift on another shift to swap. [More...](#)

Send a notification for each change

| | Jun-25 - Mon | Jun-26 - Tue | Jun-27 - Wed | Jun-28 - Thu | Jun-29 - Fri | Jun-30 - Sat |
|---------------------|-----------------|-----------------|-----------------|-----------------|-----------------|--------------|
| (Unassigned Shifts) | | | | | | |
| John Aaron | 9am - 3pm | 5pm - 9pm | 12pm - 6pm | 12pm - 6pm | 3pm - 9pm | |
| Aaron Abson | 9:30am - 5:30pm | | 9am - 5pm | | 12pm - 6pm | 9am - 12pm |
| Dean Almanson | 9am - 12pm | 9:30am - 5:30pm | 9:30am - 5:30pm | 9:30am - 5:30pm | 9:30am - 5:30pm | |

To COPY a shift to another day/employee

On the By Employee schedule view

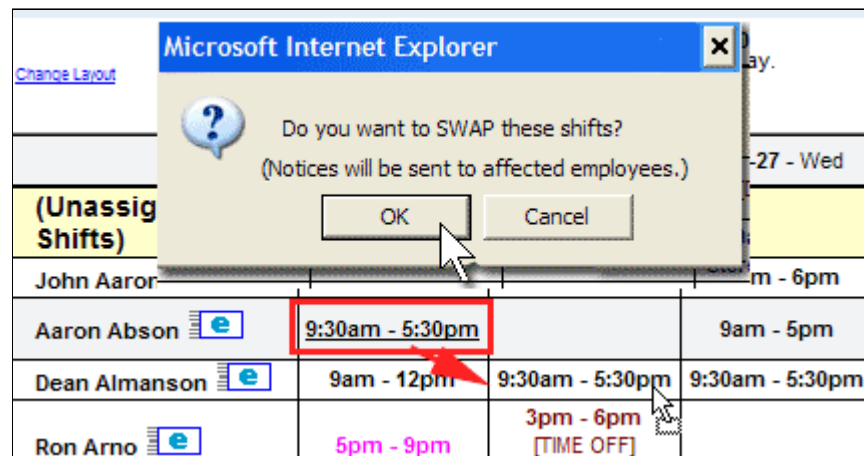
- Hold down the Ctrl key and click and hold down the left mouse button on a shift and drag it to another day and/or employee

Note that Ctrl dragging shifts to copy them cannot be undone with the UNDO button.

To SWAP two shifts

On the By Employee schedule view

- Click and hold down the mouse on first shift and move it on top of second shift.
- Release the mouse to drop the shift on top of other shift
- You will see a warning that asks if you want to swap the shifts - click OK
- If the other employee is not set to work that position or is unavailable at that time you will see an alert and the change will not be made. If adding the shift puts the other employee over their maximum hours per week the shift will be changed but you will see an alert.



Using the UNDO button

If you want to undo the last drag & drop change you made, simply click on the "UNDO Drag / Drop" button. If you sent out email notifications when you made the change, then they will also go out when you Undo the change (and similarly if you did not send notifications on change then no notifications go out when you Undo). Note that Ctrl dragging shifts to copy them cannot be undone with the UNDO button.

Related Topics:

- [Adding Shifts to a Schedule](#)
- [The Schedule Views](#)
- [Replacements - Who's Available?](#)
- [Adding Shifts to a Schedule](#)
- [Automatic Notices Sent to Employees](#)
- [Tracking Who Has Seen Changes](#)
- [Click a Shift to Edit, Delete, Clone, Assign](#)
- [Editing Multiple Shifts at Once](#)
- [Deleting Multiple Shifts](#)
- [Manually Assign Employee to Shift](#)

Replacements - Who's Available?

If an employee calls in sick, is called out or you would like to change the worker for a shift simply click the shift and choose another employee. The list of employees displays in order of availability and work time preferences with the best recommended employees listed first. If employees have entered their [work time preferences](#) the list will sort the employees in order by who likes to work at that time on that day. The list can also be sorted alphabetically by clicking the Name column heading.

Find a replacement for a shift using the By Employee view

From the By Employee View

- Click the shift that you want to change to open the "Quick Shift EDIT" window
- Click the "Change Worker or Clone This Shift" link

The screenshot shows the 'Published Schedule' interface. At the top, it displays '03:21pm' and 'Published Schedule'. Below this, there are filters for 'Schedule View: By Employee', '1 time off request', 'Category: All Categories', and 'Positions: All Pos'. There are buttons for 'Add Shifts', 'Search', 'Save Template', 'Print', and 'UnPublish'. A navigation bar shows 'Week of Jun 4, 2007'. Below this, there are instructions: 'DRAG & DROP shifts to move them to another Employee or day. Drop shift on another shift to swap. More...'. A 'UNDO Drag / Drop' button and a checkbox 'Send a notification for each change' are also visible. The main schedule table shows shifts for 'Jun-4 - Mon'. A shift for '9am - 5pm Store-Post Office' is highlighted in red. A 'Quick Shift EDIT' window is open over this shift, showing details for 'Aaron Abson - Monday, Jun-4'. The window includes a 'DELETE This Shift' button, 'Shift History' link, 'Start Time' (9am), 'End Time' (5pm), 'Display Color' (black), 'Enter Paid Hours' (8) or 'Auto Calculate' checkbox, 'Position' (Store-Post Office), 'Optional Text' field, and 'Optional Category' (none). At the bottom of the window are 'Cancel', 'Change Worker or Clone This Shift', and 'Save Changes' buttons. A red arrow points from the highlighted shift in the schedule to the 'Change Worker or Clone This Shift' button in the window.

- Then in the Shift Change window you can see a list of available employees - sorted by who prefers that shift time. To Choose a new employee click their name (to see an employee's details double-click their name) then click the Save Changes button.

Store-Post Office Shift Change
Monday - Jun 4, 2007

[DELETE This Shift](#) [Shift History](#)

Start Time: End Time: Display Color:

Enter Paid Hours: or Auto Calculate

Optional Text:

Optional Category:

create copies of this shift

Send Notices To Affected Employees

Assigned To: **Aaron Abson**

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

| Name | Phone | Week Shifts | Week Hours | Hours Left | Group | Availability |
|-------------------------|----------|-------------|------------|------------|-------|---------------------------------|
| None (Unassigned Shift) | | | | | | |
| Aaron Abson | | 5 | 30.0 | 0.0 | 1 | Currently assigned worker |
| John Aaron | 555-2239 | 4 | 21.0 | 29.0 | 1 | Prefers this time |
| Phillip Rayston | | 4 | 24.0 | 16.0 | 1 | |
| Frank Garcia | 555-2879 | 4 | 22.0 | 18.0 | 1 | Within MIN TIME of existing ... |
| Ron Arno | 555-2967 | 2 | 16.0 | 24.0 | 1 | Overlaps CANNOT WORK h... |
| Karen Wescott | | 2 | 14.0 | 26.0 | 1 | Already working at this time |
| Dean Almanson | 555-2875 | 5 | 34.30 | 15.70 | 1 | Already working at this time |

Find a replacement for a shift on all other weekly views:

From any weekly Schedule View

- **Click the shift** that you want to change to directly open the Shift Change window

03:36pm **Published Schedule** [CHAT WITH US LIVE!](#)

Schedule View: 1 time off request Category: All Categories Positions: All Position

Hospital-Cashier Shift Change
Monday - Jun 4, 2007 [Shift History](#)

[DELETE This Shift](#)

Start Time: End Time: Display Color:

Enter Paid Hours: or Auto Calculate

Optional Text:

Optional Category:

create copies of this shift

Send Notices To Affected Employees

Assigned To: **Jana Rostenmen** [View Availability Chart](#)

Click a row, then Save Changes button, to assign that employee (Double click a name to see employee's details)

| Name | Phone | Week Shifts | Week Hours | Hours Left | Group | Availability |
|-------------------------|----------|-------------|------------|------------|-------|-------------------------------|
| None (Unassigned Shift) | | | | | | |
| Jana Rostenmen | | 5 | 28.50 | 11.50 | 1 | Currently assigned worker |
| John Aaron | 555-2239 | 4 | 21.0 | 29.0 | 1 | Prefers this time |
| Jennifer McDonnell | | 0 | 0.0 | 40.0 | 1 | |
| Jennifer Larson | | 5 | 32.0 | 8.0 | 1 | Dislikes this time |
| Randi Samuels | | 5 | 40.0 | 0.0 | 1 | Within MIN TIME of existing . |
| Lauren Donson | | 2 | 12.0 | 8.0 | 1 | Within MIN TIME of existing . |
| Frank Garcia | 555-2879 | 4 | 22.0 | 18.0 | 1 | Within MIN TIME of existing . |

- Make any changes to the shift
- Choose an employee to work the shift by clicking the name once. When you click the **Save Changes** button that employee will be assigned.
- You can choose "None (Unassigned Shift)" (If the schedule is published and you have set "all unassigned shifts to appear on the tradeboard" on your **SETTINGS** page the shift will automatically be posted to the tradeboard until a worker is assigned or picks it up)
- Another way to see who might be a good choice for a replacement is to click the "Availability Chart" link in that window. This gives a graphical view of who is available and who likes that time period along with each employee's number of hours under maximum for that week

03:36pm **Published Schedule** CHAT WITH US LIVE!

Schedule View: Calendar 1 time off request Category: All Categories Positions: All Position

Hospital-Cashier Shift Change
Monday - Jun 4, 2007

[Shift History](#)

Start Time: End Time: Display Color:

Enter Paid Hours: or Auto Calculate

Optional Text:

Optional Category:

create copies of this shift

Send Notices To Affected Employees

Assigned To: **Jana Rostenmen**

Availability/Coverage
Jun 4, 2007

only show workers who can work this shift

| Key | | prefers to work | dislikes working | cannot work | time off | working | working other position |
|------------------|----------|-----------------|------------------|-------------|----------|---------|------------------------|
| Hospital-Cashier | Hrs Left | 9 | | 10 | | 11 | 12 |
| John Aaron | 29 | | | | | | |
| Aaron Abson | 0 | | | | | | |
| Dean Almanson | 15.7 | | | | | | |
| Amy Cabillo | 5 | | | | | | |
| Caron Chamos | 2 | | | | | | |
| June Clemson | 20.5 | | | | | | |
| Richard Compton | 17 | | | | | | |
| Lauren Donson | 8 | | | | | | |

- Click **Save Changes**
- The window will close and the schedule will be updated
- Changing a published schedule automatically sends out notifications to all affected employees (unless the Send Notices to Affected Employees box is unchecked)

Note: The Shift Change window defaults to the "Grid View" of employees - if you have any trouble with this grid or prefer your employees to be sorted by first name you can try the "Non-Grid View." Click the "Non-Grid View" link in the upper left of the Shift Change window to try it out. The view will remain the same unless you change it back.

WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW SETTINGS HELP

Mar 19, 2007 04:33pm **Sample Pharmacy** Unpublished Schedule **Live Chat Support** HAVE A QUESTION? **SIGN-OUT**

Schedule View: Calendar Category: All Categories Positions: All Positions

1 time off request

(Try Non-Grid View)

DELETE This Shift

Store-Cashier Shift Change

Monday - Aug 13, 2007 [Shift History](#)

Start Time: 9am End Time: 5pm Display Color: black

Enter Paid Hours: 8.0 or Auto Calculate

Optional Text: -drawer 1

Optional Category: none

create 0 copies of this shift **Save Changes**

Assigned To: **Nathan Radison** **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) | | | | | | |
| Nathan Radison | 555-1286 | 2 | 15.50 | 24.50 | 1 | Currently assigned worker |

All changes made to a shift in the last 30 days are recorded in the shift's [Shift History](#).

Related Topics:

- [Making Changes \(after Publishing\)](#)
- [Publishing an Open Schedule](#)
- [Preventing E-Mail Notices](#)
- [Availability - Coverage Schedule View](#)
- [Tracking Changes to Shifts - Shift History](#)

Add Shifts To a Schedule

Normally it is best to use the [By Employee Schedule View](#) to add shifts because it allows you to quickly add shifts without the page reloading each time. To Add a shift on that view you can click the cell that corresponds to the Employee/day OR by you can use the **Add Shifts** button on any schedule view, (see instructions below).

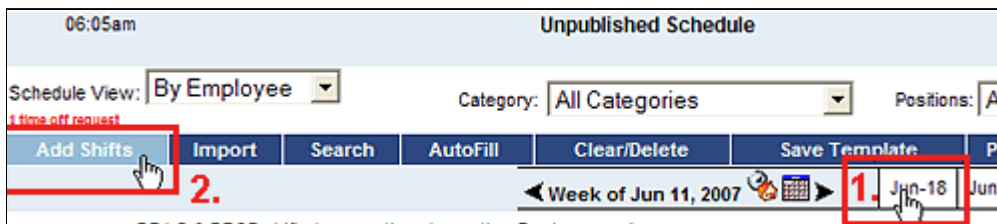
The only information required for adding a new shift is the position, begin and end time and day(s) to add shift. Below is an overview of the many options that can also be chosen when adding a shift. Keep in mind that normally you will be using Import to bring in your previously added shifts each week - after adding your first week's shifts you should only need to add shifts if you need more than you had the previous week.

[Click here for Quick Adding Shifts using the By Employee View](#)

Shifts can also be added from any schedule view by using the Add Shifts button

From any weekly Schedule View:

- Roll over the **Week of....section and choose the week you want** and navigate to it. (Or click the ► arrow or the calendar) (1.)
- Click the **Add Shifts** button to open the Add Shifts window (2.)



1. Category (optional) - if you have created categories you can choose a category to prepopulate the fields with your "category default" information and then click the **7. Add This Shift** button. If you do not use categories fill in the options as follows:

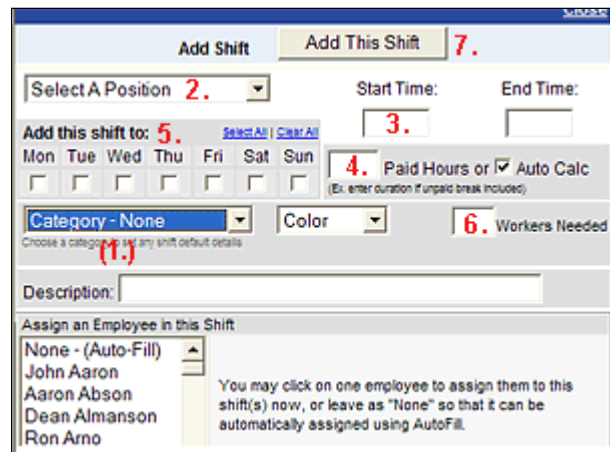
2. Select A Position for this shift
3. Begin and End Time for the shift - Enter the time with the letter a or p after it to indicate AM or PM. (Ex. 816a) or enter as military time. You can enter any times you like down to the minute.

4. Enter Paid Hours (optional) - (Duration of shift) - if the shift includes unpaid **lunch or break time** you can uncheck the Auto Calculate box and enter the time the employee will be paid (Ex. 8am to 5pm with an hour lunch enter duration of 8 paid hours)

5. Days to add Shift - check off the days you want to add this shift

6. Workers Needed (optional) - if you need more than one worker for this time period to work this position enter how many workers are needed

7. Click the Add This Shift button



Note: After adding the shift(s) the window will stay open for you to enter another shift. For your convenience the Position, begin and end times, etc. are kept for the next shift.

To change the times simply click and type the new times. When you are finished adding shifts for all of your Positions click **Done** and the window will close.

Your schedule will now display with the new shifts and you are ready to make any need changes and then **AutoFill** to get the best assignments possible for your shifts.

Optional information that can be entered for any shift

Description - which can be displayed with the shift on the schedules (Ex. if there are special instructions to the employee or schedule meal or BREAK TIMES)

Assign Employee(s) -You can assign an employee manually when adding a shift by clicking the employee name (to choose multiple employees hold down CTL and click multiple names in the list) In most cases you will leave the assignment as None (Auto-Fill) so that AutoFill will choose the best employee for you.

Categories - If you have shifts with similar begin and end times over multiple Positions you can create categories for faster entry. Click the Category drop down box and choose Add / Edit Categories to create categories for Add Shift information. (Ex. if you have similar night shifts for different positions you can create a NIGHT category and enter the defaults so that when you Add Shifts you can first choose that Category and the fields will be prepopulated (but changeable) for you.

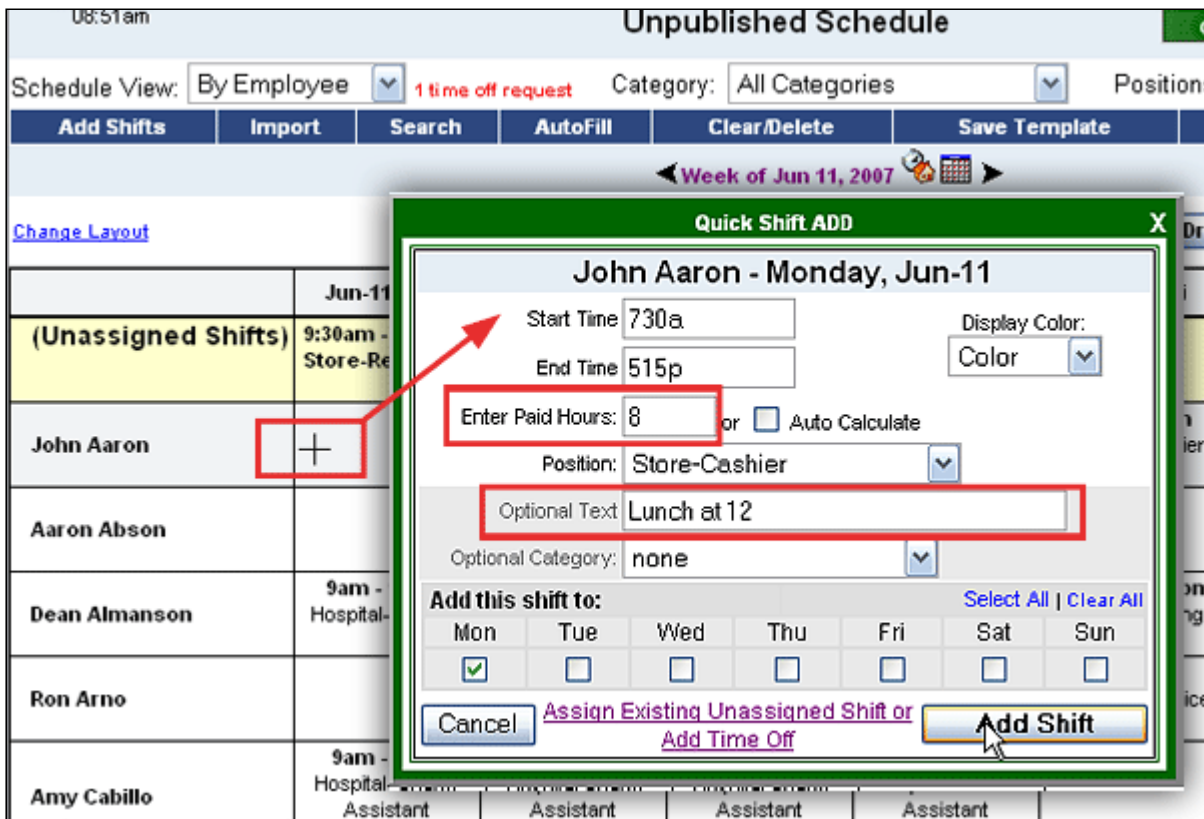
NOTE: When adding a shift if you choose to assign an employee who is not set up to work that Position you will be given an opportunity to add that position for the employee in a new window - when that windows closes you will the message "**Your shift was NOT added**" - you must hit the **Add Shifts** button again to then assign the employee to that shift.

Related Topics:

- [Adding Shifts to a Schedule](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Preplacing an Employee](#)
- [AutoFilling your Schedule](#)
- [Adding New Category Definitions](#)

Adding Lunch or Breaks to Shifts

Lunches or breaks can be added to shifts when they are first created or at any time. Once you have added this information into a schedule week it will be there when you **Import** the week into future schedules. This information is added in the shift description field for each shift and then the shift "Paid Hours" can be manually set to account for any unpaid lunch or break time.



So for example if you have an 7:30am to 5:15pm shift with an unpaid 1 hr, 45 min lunch you can enter those begin and end times and then enter paid hours of "8" and then in the shift description you could enter "Lunch at 12." The break times can then be displayed on the schedules for both employees and managers to see.

You can quickly add this information to multiple shifts using the [Multi-Shift Edit schedule view](#)..

Note: Using this method WhenToWork does NOT allow you to graphically see and account for break time within the shifts. If you need to have accurate worker counts at all times you could in the example above create one shift from 8am-12:15 and another shift from 1:15 to 5. This would allow you to have accurate counts on the Availability/Coverage but then might be awkward if employees use the tradeboard and need to post two shifts to try to get rid of one day's work.

Related Topics:

- [Filtering the Schedule View/Printout](#)
- [Viewing One or More Locations](#)
- [Standard Views](#)
- [Multi-Shift Edit View](#)
- [Availability - Coverage View](#)
- [Change Layout - Fonts, Name Order etc.](#)

Automatic Notices Sent to Employees

WhenToWork can be set up to automatically notify employees when there is a new schedule or when an employee's schedule has changed. Each employee has a **Notifications** page where they can enter email addresses and text message addresses and choose what events trigger a notice sent to each address. (Managers with permission to edit employees can also view and set up these notifications for employees from the [Employee details](#) page.)

The default choices when adding an email is address includes "Forwarding all WhenToWork Messages" which means that notifications are automatically sent when:



- A schedule is published or unpublished (unless SETTINGS option is set to "No") E-mail includes link for employee to confirm receipt.
- A published schedule is changed (only affected employees are notified) (this can be turned off when making the changes) E-mail includes link to confirm receipt.
- When the manager approves or denies an employee-submitted time off request
- When the manager approves or denies a trade/drop/unassigned pickup request
- When Manager clicks "E-Mail Employee Sign-In Instructions" in the Edit Employee window




You can stop automatic notifications from being sent out when Publishing & Unpublishing by changing that option on your SETTINGS page. This option can be turned on and off and at any time and the change goes into effect immediately (it does not requiring logging out and back in to go into effect).

Stopping Notices when Changing Shifts on a Published Schedule

When changing a shift on a published schedule you can check or uncheck the box for sending notifications to affected employees. A useful Schedule View when making multiple changes to a published schedule is the **Multi-Shift Edit** Schedule View which allows you to change a number of shifts, set whether or not to send notifications and then Save Changes all at once. Note these check boxes all default on or off according to your SETTINGS page notification option choice.

Forwarding to E-Mail

Messages can be viewed when users sign-in to WhenToWork.com. Messages are automatically forwarded to the user E-mail if their E-mail address is entered into the system. (Notification options can be set up for each email entered.) When a new schedules or schedule changes are e-mailed to employees , the e-mail also includes a link for them to confirm receipt. When confirmed, the confirmed icon  appears on the **Statistics** and **By Employee** schedule view.

On the **Statistics** and **By Employee** schedule views (You can see the status of whether employees have been  e-mailed the schedule,  confirmed receipt of e-mail, or  has logged in and viewed the schedule.)




Related Topics:

- [How Messaging Works](#)
- [Enter E-Mails for Automatic Forwarding](#)

Track Who Has Seen The Schedule and Schedule Changes

After a schedule is Published two schedule views show you the status of each employee and whether they have seen it.

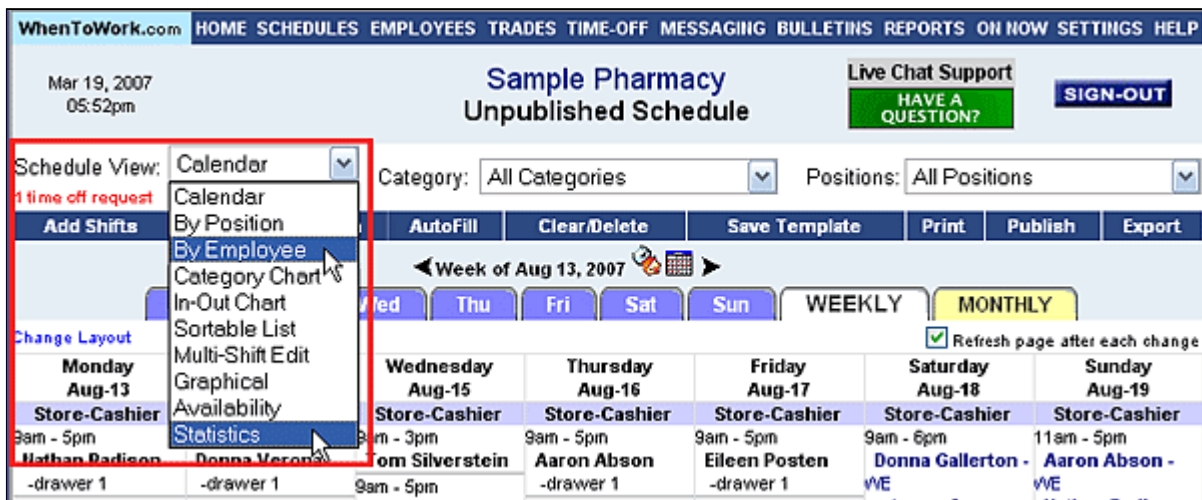
By using the "By Employee" or "Statistics" Schedule View you may see next to certain employees the following icons:

-  Means that the schedule was E-mailed to the employee
-  Employee confirmed receipt of e-mail
-  Means that the employee has signed in and viewed their most current schedule

To check who has seen their most recent schedule or confirmed receipt of their schedule e-mail after changes have been made:

From any Schedule View

- In the Schedule View dropdown box choose "Statistics" or "By Employee"



The screenshot shows the 'WhenToWork.com' interface for 'Sample Pharmacy' with an 'Unpublished Schedule'. The 'Schedule View' dropdown menu is open, showing options like 'Calendar', 'By Position', 'By Employee', 'Category Chart', 'In-Out Chart', 'Sortable List', 'Multi-Shift Edit', 'Graphical', 'Availability', and 'Statistics'. The main schedule grid displays days from Wednesday to Sunday, with employee names and shift times listed for each day.

To track the latest sign-in time and date for each employee:

From any page

- In the top menu click **EMPLOYEES** to open the Employee List page
- If the Last Login column is not showing on that page:
 - Click the **Select Columns to View** link in the upper left of page
 - Check the box next to Last Sign-In
 - Click **Update Display**

WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW SETTINGS HELP

Mar 19, 2007 05:58pm Sample Pharmacy Employees

1 pending time off request

Add New Employee

Select Columns to View

Include Columns:

- Last Sign-In 2.
- Sign-In Count
- Address
- Address 2
- City
- State
- Zip
- E-Mail
- Employee Number
- Phone
- Phone2
- Cell
- Hire Date
- Comments
- Scheduling Group
- Max Weekly Hours/Days
- Max Daily Hours/Shifts
- Pay Rate

Update Display

Total Employees: 37

| Max Weekly Hours | Max Weekly Days | Max Daily | |
|------------------|-----------------|-----------|--------|
| | | Hours | Shifts |
| 50 | 7 | 14 | 1 |
| 30 | 7 | 14 | 1 |
| 50 | 7 | 14 | 2 |
| 40 | 7 | 14 | 1 |
| 40 | 7 | 14 | 1 |
| 20 | 7 | 14 | 1 |
| 40 | 7 | 14 | 1 |
| 50 | 7 | 14 | 1 |
| 20 | 7 | 14 | 1 |

The last date the employee signed in can also be seen in the "View Employee Details Window" which can be viewed by clicking an employee name anywhere in the system.

WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW SETTINGS HELP

Mar 19, 2007 05:58pm Sample Pharmacy Employees

1 pending time off request

Add New Employee

Select Columns to View

John Aaron

Information Schedules - Preferences Time Off

Name: John Aaron

Phone: 555-2239

E-Mail: sample@when2work.com [Edit E-Mail Notifications](#)

Positions: Hospital-Cashier Hospital-Pharm. Assistant Store-Cashier
Store-Cosmetics Store-Floater Store-Floor
Store-Giftware-Front Store-Post Office Store-Receiving

Hire Date: 4/21/2004

Pay Rate: 8.00

Scheduling Group: 1

Max AutoFilled: 50 Hrs/Week 7 Days/Week
14 Hrs/Day 1 Shifts/Day

Employee #: 12300

Address: 1123 Main Street

City, State, Zip: Uptown, CA

Last Sign-In: 03/17/07 02:07pm

Comments: up for promotion

Related Topics:

- [Changing the Schedule View](#)
- [List of Employees](#)
- [Viewing Employee Details](#)

Click a Shift to Edit, Delete, Clone or Assign

To Edit, Delete, Clone or Manually Assign a Shift on the By Employee View:

Normally it is best to use the [By Employee Schedule View](#) to edit, delete, close or assign shifts because it allows you to quickly make changes without the page reloading each time. To Edit a shift on that view you can click the shift, use Drag/Drop to move shifts or Ctrl Drag/Drop to make a copy of a shift. Note the By Employee view is the only one that allows you to edit a shift's position. See [By Employee Schedule View](#) for more about using the By Employee view.

If you are editing more than one shift it may be more convenient to use the ["Multi-Shift Edit" Schedule View](#).

To Edit, Delete, Clone or Manually Assign a Shift using other Weekly Schedule Views:

From any weekly Schedule View (except the [By Employee](#))

- (1.) Click on any shift to open the (2.) Shift Change window
- Make whatever changes are needed
 - change the times, display color, text, category etc.
 - or type the number of copies of this shift that you want to Clone (Exact unassigned copies of the shift for the same day and position)
 - or click the Delete button in the top left of the window to delete the shift
 - or click an employee name to assign an employee to work the shift (employees are listed in order by availability, click any column heading to sort by that column)
- click the **Save Changes** button
- the window will close and the Schedule View will be updated
- If the shift was on a published week all affected employees are automatically notified.

Unpublished Schedule
(Try Non-Grid View) (To Edit more than one shift at a time try the [Multi-Shift Edit](#) Schedule View)

Store-Floor Shift Change
Monday - Jun 11, 2007

Start Time: 9am
End Time: 5pm
Display Color: black

Enter Paid Hours: 6.0 or Auto Calculate

Optional Text:

Optional Category: none

create 0 copies of this shift **Save Changes**

Assigned To: **June Clemson** [View Availability Chart](#)

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

| Name | Phone | Week Shifts | Week Hours | Hours Left | Group | Availability |
|-------------------------|----------|-------------|------------|------------|-------|-----------------------------------|
| None (Unassigned Shift) | | | | | | |
| June Clemson | | 4 | 26.50 | 13.50 | 1 | Currently assigned worker |
| Jana Rostenmen | | 4 | 24.0 | 16.0 | 1 | Prefers & dislikes this time |
| Lucy Gingam | 555-2896 | 4 | 24.0 | 16.0 | 1 | |
| John Aaron | 555-2239 | 2 | 12.0 | 38.0 | 1 | Dislikes this time |
| Donna Gallerton | 555-8236 | 4 | 27.50 | 2.50 | 1 | Within MIN TIME of existing shift |

Related Topics:

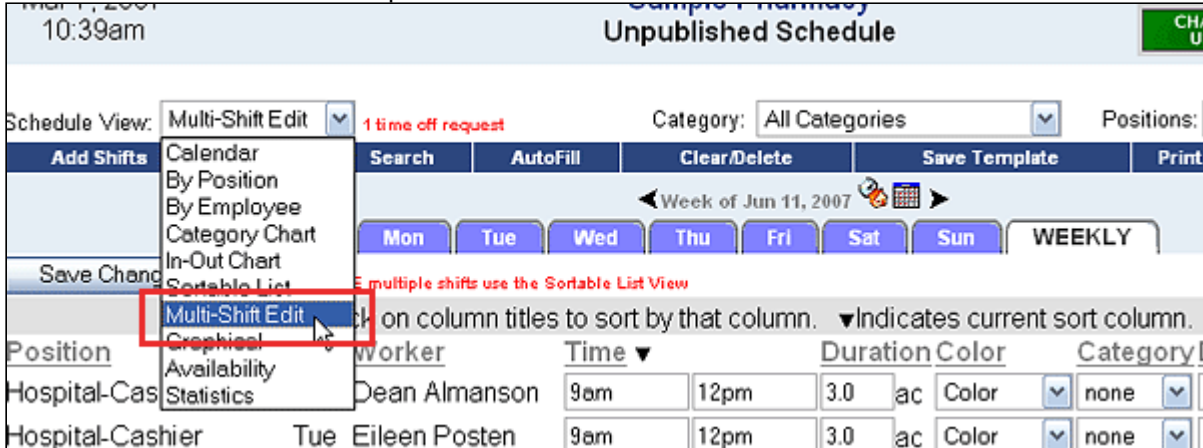
- [Multi-Shift Edit View](#)

Edit Multiple Shifts in a Week at Once

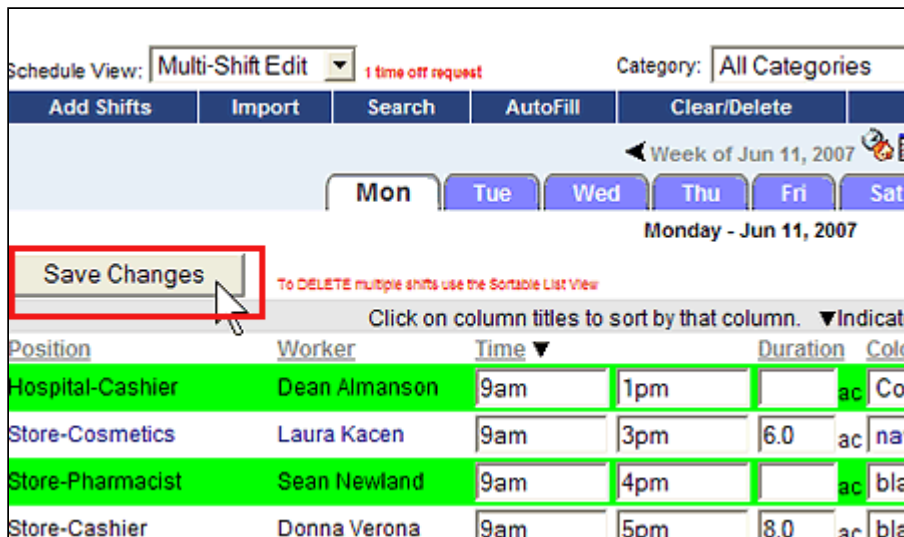
If you have a number of changes to make to shifts already created, you can use the **Multi-Shift Edit** schedule view. This allows you to sort by any column and to make changes to everything (except the position and worker assignment) and save all changes at once.

To edit multiple shifts:
From any Schedule View

- In the Schedule View dropdown box choose **Multi-Shift Edit**



- Make changes to shifts by typing, pasting text, or changing dropdowns for any number of shifts. (The row for each changed shift will appear green.)
- Click the **Save Changes** button to save all of the changes



Note: Position and Employee assignments cannot be changed using this method. The position can be changed from the **By Employee** View or by clicking the shift on any view. Multiple Shifts can be set to unassigned by using the [Sortable List Schedule View](#). Shifts can be assigned to specific employees by clicking the individual shift to edit or using [AutoFill](#).

Related Topics:

- [Multi-Shift Edit View](#)
- [Making Schedule Changes](#)
- [Deleting Multiple Shifts](#)

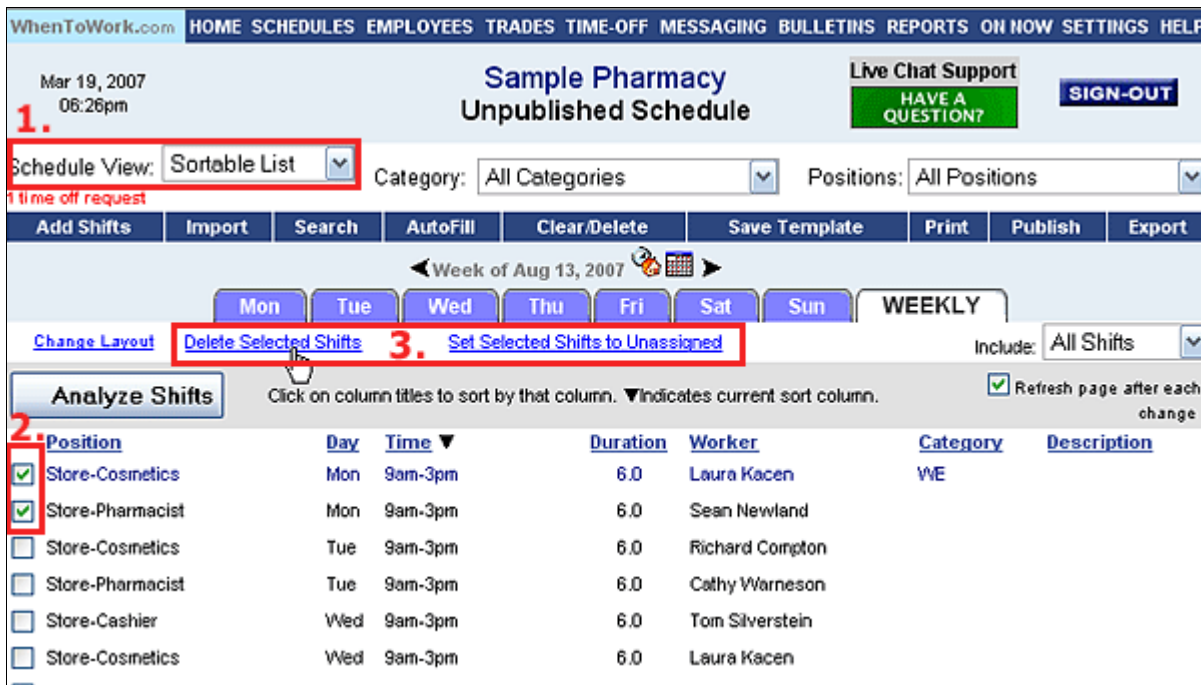
Delete or Unassign Multiple Shifts

To delete or unassign a single shift you simply click on the shift in any weekly view to open the Shift Change window and then click the **Delete** button or set the worker to None. If you are deleting or clearing more than one shift you can use the **Sortable List** weekly Schedule View to delete or unassign (clear) them all at once.

To Delete Multiple Shifts

From any Schedule View

1. In the Schedule View dropdown choose **Sortable List** (this schedule view can be sorted by any column)
2. Check the boxes next to the shifts you want to delete (at the bottom of the page is a "Select All" link)
3. Click the **Delete Selected Shifts** link



WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW SETTINGS HELP

Mar 19, 2007 06:26pm

Sample Pharmacy
Unpublished Schedule

Live Chat Support
HAVE A QUESTION? SIGN-OUT

1. Schedule View: **Sortable List** Category: All Categories Positions: All Positions

Time off request

Add Shifts Import Search AutoFill Clear/Delete Save Template Print Publish Export

Week of Aug 13, 2007

Mon Tue Wed Thu Fri Sat Sun WEEKLY

Change Layout **Delete Selected Shifts** 3. Set Selected Shifts to Unassigned Include: All Shifts

Analyze Shifts Click on column titles to sort by that column. ▼ indicates current sort column. Refresh page after each change

| Position | Day | Time | Duration | Worker | Category | Description |
|--|-----|---------|----------|-----------------|----------|-------------|
| <input checked="" type="checkbox"/> Store-Cosmetics | Mon | 9am-3pm | 6.0 | Laura Kacen | WE | |
| <input checked="" type="checkbox"/> Store-Pharmacist | Mon | 9am-3pm | 6.0 | Sean Newland | | |
| <input type="checkbox"/> Store-Cosmetics | Tue | 9am-3pm | 6.0 | Richard Compton | | |
| <input type="checkbox"/> Store-Pharmacist | Tue | 9am-3pm | 6.0 | Cathy Warneson | | |
| <input type="checkbox"/> Store-Cashier | Wed | 9am-3pm | 6.0 | Tom Silverstein | | |
| <input type="checkbox"/> Store-Cosmetics | Wed | 9am-3pm | 6.0 | Laura Kacen | | |

If you make changes to a published schedule the affected employees are only automatically sent notification messages if the "Send notifications" box at the top of the page is checked.

or Use the Clear/Delete button

On UnPublished weeks you also can filter your display and then delete shifts for those particular Positions, Categories and Groups (or Delete an entire schedule) using the **Clear/Delete** Function.

Clear Shifts
 This command will affect: Store-Pharmacist
 Categories: All Categories

For this WEEK'S Schedule

- Clear all auto-filled shifts
- Set every shift to UNASSIGNED
- ERASE this entire schedule

Clear WEEK

For one DAY'S Schedule
 Monday

Clear the auto-filled shifts

Published Schedule
 Category: All Categories
 Positions: Store-Pharmacist

Week of 01/03/2009

| Thursday 1/6 | Friday 1/7 | Saturday 1/8 | Sunday 1/9 |
|--|--|---|--|
| Store-Pharmacist 9am - 3pm Caron Chamos do not be late 3pm - 9pm Cathy Warneson | Store-Pharmacist 9am - 3pm Sean Newland 3pm - 9pm Caron Chamos | Store-Pharmacist 9am - 6pm Cathy Warneson | Store-Pharmacist 11am - 5pm Cathy Warneson |

Related Topics:

- [Sortable List View](#)
- [Clearing Work Assignments - Deleting Shifts](#)

WhenToWork.com Online Scheduling

Clear Work Assignments

On UnPublished weekly schedule views 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 (If you allow that on your SETTINGS>Employee Permissions page.).

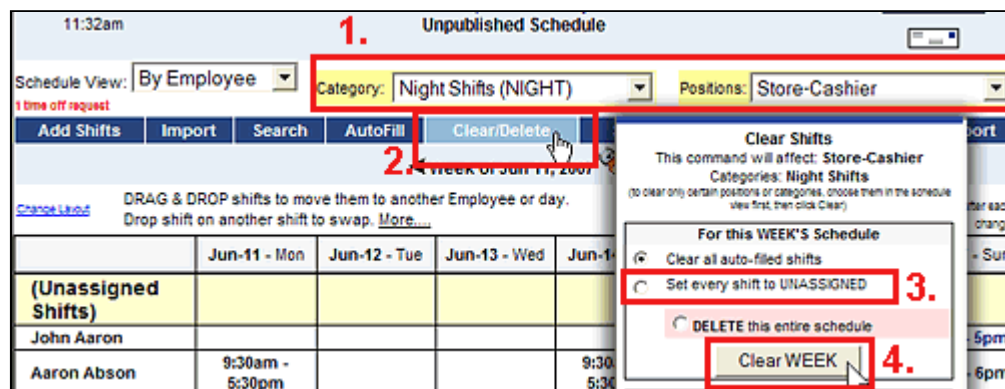
You can Clear (unassign) shifts:

- 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 and checking off the ones to clear)
- a number of shifts at once by filtering on a position, category or group first (using the **Clear/Delete** button - see below).
- 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 on the screen



- 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 all 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](#)

Manually Assigning Employees to Shifts

You can manually assign employees to shifts before or after using AutoFill. If some of your employees always work certain shifts ("pinned" employees) you can assign only those workers and use **Save Template** (so that when you Import and AutoFill in future weeks those employees will already be assigned). You can assign employees when **Adding Shifts** or later by **Editing a Shift**.

You can use the **By Employee** Schedule View to quickly add a shift for an employee by clicking the cell for the employee/date OR from other Schedule Views:

To Assign an employee (or make changes) to a shift:

On any weekly Schedule View:

- Click on the shift to bring up the Shift Change window (1.)

The screenshot shows the 'Hospital-Cashier Shift Change' window. The 'Save Changes' button is highlighted with a red box and labeled '3.'. In the background, a table shows a list of employees and their assigned shifts. The shift '9am - 12pm' is highlighted with a red box and labeled '1.'. The employee 'Dean Almanson' is highlighted with a red box and labeled '2.'.

| Name | Phone | Week Shifts | Week Hours | Hours Left | Group | Availability |
|-------------------------|----------|-------------|------------|------------|-------|---------------------------|
| None (Unassigned Shift) | | | | | | |
| Dean Almanson | 555-2975 | 4 | 24.0 | 16.0 | 1 | Currently assigned worker |
| Jana Roslenmen | | 4 | 24.0 | 16.0 | 1 | Prefers this time |
| Lucy Singani | 555-2090 | 4 | 24.0 | 16.0 | 1 | |
| Virginia Hector | 555-8973 | 3 | 22.0 | 18.0 | 1 | |
| Tom Silverstein | | 4 | 16.0 | 24.0 | 1 | |
| Jennifer Larson | | 3 | 21.0 | 19.0 | 1 | Dislikes this time |

- Choose the employee you want to be assigned to the shift by clicking on the employee name (Double click the employee name to bring up that employee's details window.) (You also can make any other changes to the shift information you like.) (2.)
- Click **Save Changes** (3.)

You also can assign an employee at the time you **Add Shifts**.

Related Topics:

- Assigning Certain Employees Before AutoFilling
- Adding Shifts to a Schedule

Show Schedules to Non-Employees, Third Party

If you have supervisors, other non-employees or a third party who need to see your schedules you can [create a Manager account](#) for them and uncheck all permissions. This way they can log in and see everything with the manager interface - but they cannot make changes.

You may have an unlimited number of managers and they do not count toward your account employee billing total.

Related Topics:

- [Adding Managers & Permissions](#)

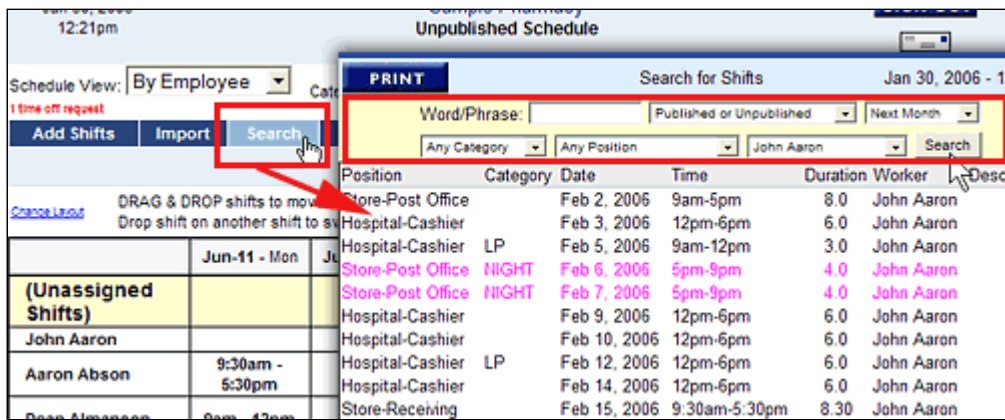
Search for Shifts

You can search for shifts based on certain criteria from most UnPublished and Published views. This can be handy for example, to find all shifts for an employee in the next month,

To search for shifts:

From any weekly Schedule View

- Click **Search** to open the Search window
- Change the settings to narrow your search (ex. Published or Unpublished)
- Enter a word or phrase to search for in the description if necessary
- Choose the time period to search
- Click **Search**



The list of shifts that match that search will appear in the same window below. Clicking certain words for any of the shifts listed will open a new window with information

- Click the Employee name to bring up the View Employee Details window
- Click the Date to go that day in the schedule
- Click any other part of the row to go to the Shift Change window so that you can make changes to the shift.

Example Uses for Search:

- list one employee's shifts for the next month
- view one employee's shifts for a certain position or category for last month.
- view all shifts with a specific word in the description (where you might have entered a client name or event etc.)
- view unassigned shifts for next month
- view shifts for one location that contain a certain phrase
- view published shifts for a deleted employee

the Search Window allows you to find and list shifts based on a number of things:

| | | | |
|-----------------|--|-------------|--|
| Schedule Status | Published or Unpublished Unpublished Published | Time Period | Any Time Today After Today Before Today This Month Last Month Next Month |
| Category | All Categories choose a category or group | | |

| | | | |
|-----------|---|----------|--|
| Position: | All Positions choose a position or group | Employee | All employees Unassigned Shifts choose one employee choose a deleted employee |
| Phrase | type a phrase (optional) | | |

Related Topics:

-

Who's On Now - Who's On Later

Managers (and employees if you allow them on the [SETTINGS>Employee Permissions](#) page) can get a quick view of who is working right now or coming in later using the ON NOW section.

| Worker | Position | Category | Until | Duration | Description |
|----------------|---------------------------|----------|-------|----------|-------------|
| Amy Cabillo | Hospital-Pharm. Assistant | | 6pm | 9.0 | |
| Judy Gray | Hospital-Pharmacist | | 6pm | 9.0 | |
| Nathan Radison | Store-Cashier | | 5pm | 8.0 | -drawer 1 |
| Eileen Posten | Store-Cosmetics | WE | 3pm | 6.0 | |
| Dean Almanson | Store-Floor | | 5pm | 6.0 | |

Click the "Show Those Working Later Today" or the "Show all of Today's Shifts" links to see those lists.

On your [SETTINGS>Employee Permissions](#) page you can also allow employees to see this view when they sign in.

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](#)
- [Setting a Category Default Shift Color](#)



Log in Via a Web Enabled Phone or PDA

Managers and Employees can log into a very basic view of their account using:

<http://WhenToWork.com/ph>

Managers can view schedules, find employee information and view other information.

Employees can view their schedule, messages and trade offers.

Employees also can sign in using the regular login and download a VCAL VCS file from their "My Schedule" page and import it into Outlook or other Calendar programs and then synchronize with their PDA.

Track Changes to Shifts - Shift History

Managers (with permission to edit shifts) can click on a shift and see a link to access a "Shift History" that shows shift creation and log of change details for the last 30 days. This can be useful to track who changed details about a shift or assigned it.

If you allow employees to trade or pick up shifts "At Will" you will see the employee that "changed" a shift and picked it up along with when the shift was originally created and any other changes made.

Viewing the Shift History Using the By Employee View:

From the By Employee Schedule View

- Click **the shift** to open the Quick Shift EDIT window
- Click the **Shift History** link in the upper right

The screenshot shows the 'Unpublished Schedule' interface. A 'Quick Shift EDIT' window is open for 'Aaron Abson - Monday, Jun-11'. The window includes fields for 'Start Time' (9:30am), 'End Time' (5:30pm), 'Display Color' (black), and 'Enter Paid Hours' (8). A 'Shift History' link is highlighted in the upper right corner of the 'Quick Shift EDIT' window. Below it, a 'Shift History' window is open, displaying a table of changes for the shift '9:30am - 5:30pm Store-Receiving'.

| Date | Changed By | Change |
|----------------|------------|-------------------|
| Mar-7, 03:31pm | John Smith | Worker assigned |
| Mar-7, 03:31pm | John Smith | Worker reassigned |

Note: Shift change details are kept for the last 30 days

Using Other Weekly Schedule Views:

From the Schedule View

- Click **the Shift** to open the Shift Change window
- Click the **Shift History** link in the upper right

09:17am

Published Schedule

(Try NON-GRID View)

Schedule View: Calendar

Add Shifts

DELETE This Shift

Hospital-Cashier Shift Change

Monday - Jun 4, 2007

Shift History

Start Time: 9am

End Time: 12pm

Display Color: black

Enter Paid Hours: 3.0 or Auto Calculate

Optional Text:

Optional Category: none

Shift History

Jun 4, 2007 9am-1pm

Jana Rostenmen

Hospital-Cashier -

| Date | Changed By | Change |
|------------------|------------|--------------------------------------|
| Mar-10, 09:41 am | John Smith | End Time changed Duration changed |

Note: Shift change details are kept for the last 30 days

Monday Jun-4

Hospital-Cashier

9am - 12pm

Jana Rostenmen

Hospital-Pharm

Assistant

9am - 6pm

Amy Cabillo

Hospital-Pharma

9am - 6pm

Judy Gray

Store-Cashier

1:30am - 5:15pm

John Aaron

Lunch at 12

9am - 5pm

Donna Verona

-drawer 1

9:30am - 6:30pm

Hathan Radison

Jennifer McDonnell

0 0.0 40.0 1

CHAT WITH US LIVE!

Related Topics:

- [Clicking a Shift to Edit, Delete, Clone or Assign](#)
- [Deleting Multiple Shifts](#)
- [Tracking Schedule Changes - Import, AutoFill, Publish](#)

Schedule History - Track Schedule Changes (Import, AutoFill etc.)

Managers (with permission to edit shifts) can click on the **Schedule History** link at the bottom of each weekly schedule to access a "Schedule History" window that shows details about when a schedule week was Imported, Published or Unpublished and also who performed the function. Note you can also track changes to individual shifts using each shift's [Shift History](#).

If you allow employees to trade or pick up shifts "At Will" you will see the employee that "changed" a shift and picked it up along with when the shift was originally created and any other changes made.

To view the Schedule History:

From any Weekly Schedule View

- Navigate to the schedule week you want to view
- Scroll to the bottom of the schedule and click the "Schedule History" link in the lower right.

The screenshot displays the 'Sample Pharmacy Published Schedule' for the week of June 4, 2007. The interface includes a navigation bar with options like 'HOME', 'SCHEDULES', 'EMPLOYEES', etc. Below the navigation bar, there are filters for 'Schedule View' (Calendar), 'Category' (All Categories), and 'Positions' (Store-Cashier). A 'Schedule History' pop-up window is open, showing a table of changes for the week of August 13, 2007. The table has columns for Date, Changed By, Change, Filter, and Details. A red arrow points from the 'Schedule History' link in the bottom right corner of the main interface to the pop-up window.

| Date | Changed By | Change | Filter | Details |
|-----------------|------------|-----------------|--------|--|
| Mar-19, 02:03pm | John Smith | Import Schedule | (None) | Week of Aug 6, 2007 (Added to existing shifts) |

Related Topics:

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