



Schedule Template User Guide

Scheduling Module



Introduction

The Schedule Template is designed to reduce the amount of time you need to spend each week on schedule maintenance. By taking data from the availability information for each employee, the system will build a schedule automatically. The template provides schedule administrators the ability to set up repeating shift rotations for qualified employees over a set time period. Once you have a template created, it will have the highest priority of an automatic schedule build.

Once you've mastered creating and using schedule templates, you will only need to make schedule changes for exceptions. By having a template and an enforced rotation set up, you reduce the amount of time you will need to spend each week maintaining the schedule and can focus

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Template Summary

By default, each schedule's template is disabled. Before setting up your template, you must first contact our technical support team to enable this feature. The template will only apply to the schedule they are enabled on.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

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When speaking to one of our representatives, you must first take the following steps:

- 1) Determine which schedule you want to set up a template for.
- 2) Determine the calendar date that the schedule template will begin (we recommend on the first day of the schedule period).
- 3) Determine the number of weeks it should run before it repeats.
- 4) Ensure that the employees are qualified for any Job Descriptions that you want the Template to assign. (This can be done from the Job Descriptions color bar using the Employees link or from the Employees color bar using the Job Descriptions color bar.) Please read our Job Descriptions [user guide](#) for more information.

Once you've taken the steps outlined above, you are ready to begin configuring the template. First navigate to the **Manage** tab in the Scheduling module and selecting the Schedule Period you would like the template to begin on. (Figure 1)

The screenshot displays the StaffReady Scheduling interface for the 'Main Lab Chemistry' department. The top navigation bar includes 'Scheduling', 'View', 'Manage', 'Setup', and 'Departments'. The main area shows a calendar for the week of 02/22 to 02/27, 2021. A list of employees is on the left, with their assigned shifts for each day. A 'Manage' tab is active, and a 'Schedule' dropdown is set to '02/14/2021 - 02/27/2021'. A 'Publish Schedule' button is visible. The calendar grid shows shift assignments for various employees, such as 'Late Shift' and 'Early'.

Figure 1

Scheduling Template Setup

You must make sure that whichever schedule period is selected is in Automatic Build status. (Figure 1)

Note: The method described here will generate a blank template. You can also take a snapshot with the shifts that you currently have assigned in a schedule period and that will be the basis for your template without having to unassign shifts first.

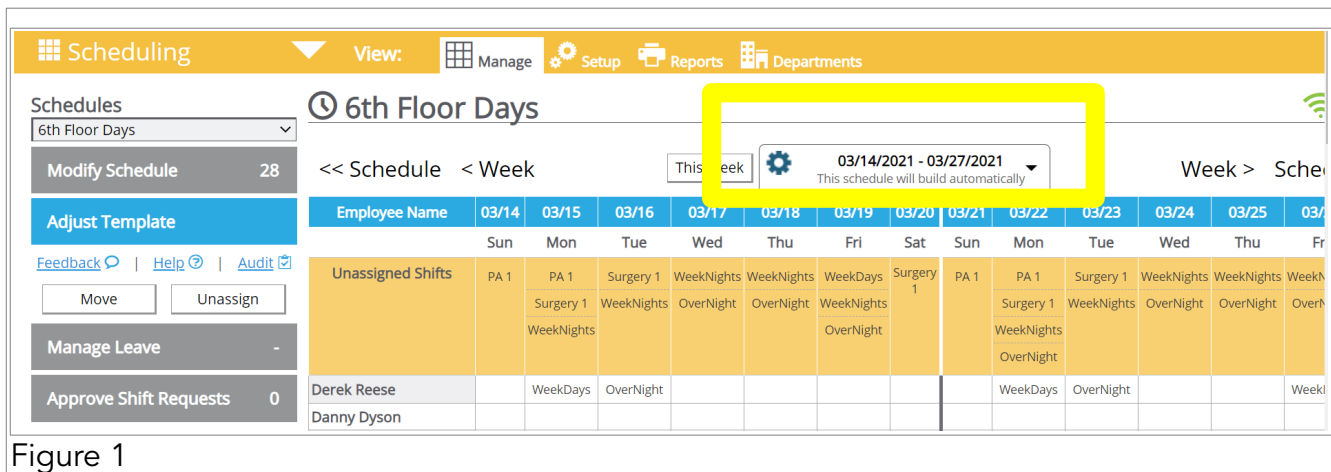


Figure 1

You must manually unassign all shifts on the schedule for the duration of the **Template** using the **Unassign** function. (Figure 2)

Select the **Unassign** button from the **Modify Schedule** menu and then select each shift on the calendar to Unassign it.

Assign all unassigned shifts to the appropriate employees for the duration of the template. (Figure 3)

Do not assign any shifts that you want to assign using the configuration in the **Setup** tab. All employees that you wish to assign must be qualified for their shifts before they can be assigned.

Once this has been done, contact StaffReady Technical Support to request that the **Template** be enabled.

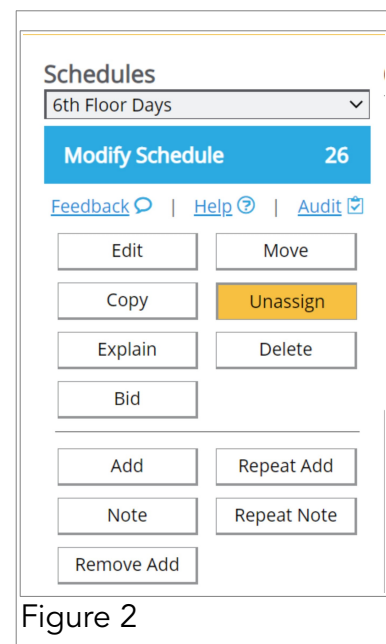


Figure 2

Provide the schedule name, the length of the template in weeks, and the date it should begin.

Unassigned Shifts	PA 1	PA 1	Surgery 1	WeekNights	WeekNights	WeekDays	Surgery 1	PA 1	PA 1	Surgery 1	WeekNights	WeekNights	WeekNights	Surgery 1
		Surgery 1			OverNight	WeekNights			Surgery 1	WeekNights	OverNight	OverNight	OverNight	
		WeekNights				OverNight			WeekNights					
									OverNight					

Figure 3

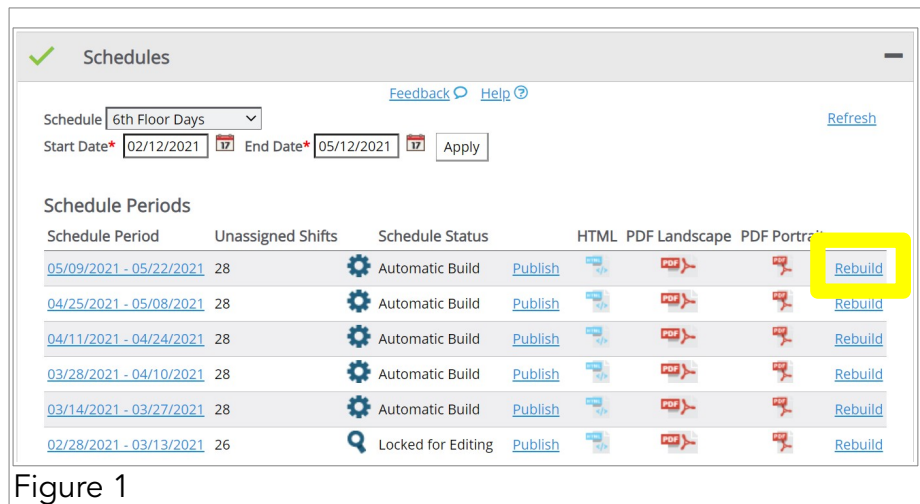
Continuing Template Setup

After customer support enables the **Template** for your schedule, a snapshot of the selected **Schedule Period's** shift assignments will be created as the Schedule Template.

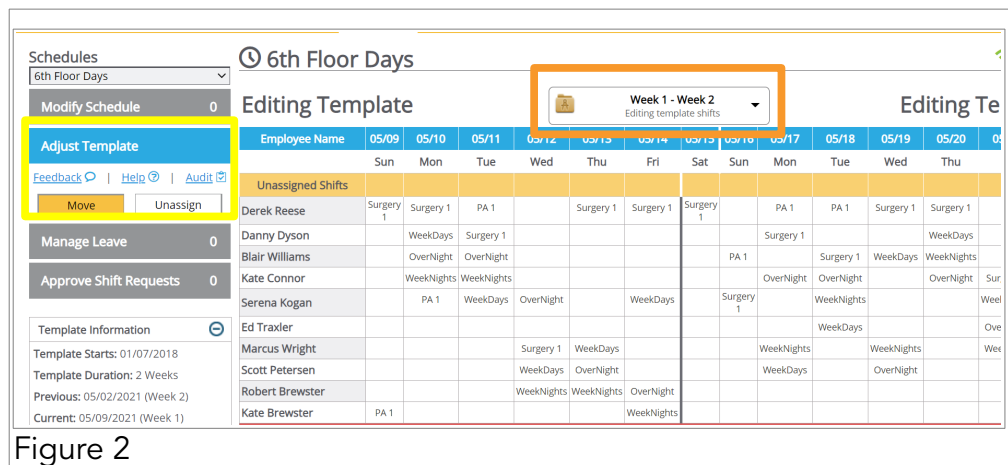
Once that has been done, navigate to the Welcome tab's Schedules menu and rebuild the Schedule Period that were locked during step 1. (Figure 1)

The **Automatic Build** will now assign the shifts as configured on the Template before assigning the remaining shifts according to the configuration in the Setup tab.

In the example in **Figure 3**, a 2 week template will be created beginning on 5/9. Select the **Adjust Template Menu** (Yellow box, **Figure 3**) and then either **Move** or **Unassign** to open the **Editing Template Screen**.



Note: The template can be configured directly from the Manage tab, and/or by using the **Enforced Rotations** feature interface. To learn more about how **Enforced Rotations** function, please check out our user guide [here](#).



All shift assignments for the specified **Schedule Period** will be applied to the **Schedule Template**. The **Editing Template** screen will only display two weeks at a time. To edit a different week(s), you can select the desired week(s) using the **Editing Template** week selection dropdown menu. (Orange box, **Figure 3**)

Resources

This concludes the User Guide for the **Schedule Template**. While not being an exhaustive resource, we hope that you have at least a cursory knowledge of this feature and how it functions within the entire framework of the Scheduling Module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

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Related Topics

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Job Descriptions	PDF Document
Modify Schedules Menu	PDF Document
My Schedules	PDF Document