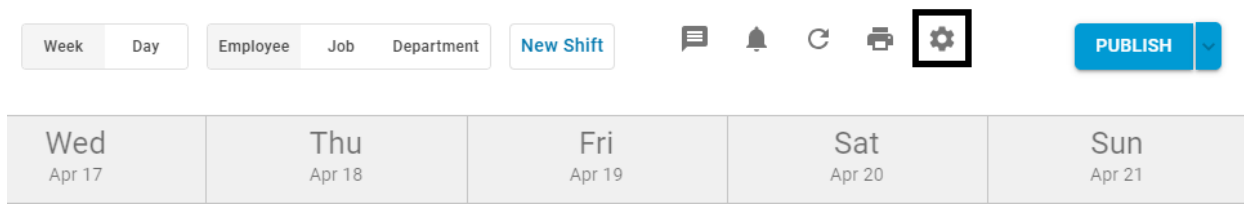# Schedule Calendar: Scheduling Templates

This feature works in conjunction with the Schedule Calendar. Click here to learn about the [Scheduling: Schedule Calendar](#).

The View & Template Options sidesheet on the Schedule Calendar allow you to set your preferred view, including if you want to view Weather, Events, and any Advanced Metrics as well as preferred Employee displays and 'Start With' options. Additionally, you can set your Schedule Calendar to display All Employees or only Scheduled Employees.

View / Template Options Sidesheet

The View/Template Options Sidesheet will appear vertically in your web browser and is only displayed horizontally for ease of reading on the Support Center.

1) Saved Views Selector - This drop-down listing will provide all Saved Views made for the Schedule Calendar. These Views can be created, updated, and removed at any time from the Save View Options (#2). Multiple Views can be created as needed, and the User can switch between them using the Saved Views Selector

**2) Saved Views Options -** The listed options will enable the following to occur:

- **Default**
  - This will set the current view selected from the Saved Views Selector (#1) as your Default View
- 💾 - This will save any changes made to the selected view
- ╋ - This will allow the User to create a new Saved View from the selections made
- 🗑 - This will delete the selected view from the Saved Views Selector (#1)
- ✕ - This will remove any updates made to this sidesheet

3) View Weather Checkbox - This will display the weather in the Week View. When checked the Weather for the Location (based on the Zip Code on the

Location Address on the <u>Location Record</u>) will be displayed on the Date, as shown below:
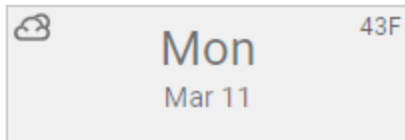
4) View Events Checkbox - This will display any posted <u>Events</u> above the date on the Event, as shown below:
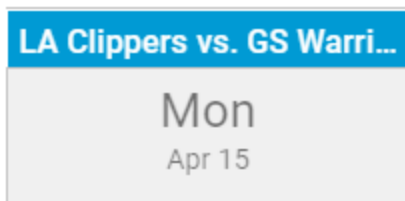
5) View Advanced Metrics Checkbox - This will enable the selected Advanced Labor Metrics to display on the Schedule Calendar. Options include the following:

- <u>Burdened</u> – Labor Estimates are calculated using (Employee Hours * Pay Rate) + Employee Benefit percentages (per the Location Record). Management Estimates (including Management Benefits) are included
- <u>Unburdened</u> – Labor Estimates are a straight calculation of Hours * Pay Rate for all Employees. No Management Estimates or Benefits included

6) Home Store Only - This will only display Employees who have this Location set as their default Location, regardless of if they have an assigned Shift during the selected Week (or Day)

7) Scheduled Employees - This will only display the Employees that are currently scheduled with at least one shift during the selected Week (or Day)

8) Sort Selector - The organization of Employees on the Schedule. Options include:

- Start Time (Earliest - Latest)
- **Note:** This option will only appear when viewing the Schedule in 'Day' View. If selected and two or more Employees start at the same time, those Employees will be organized alphabetically
- Start Time (Latest - Earliest)
- **Note:** This option will only appear when viewing the Schedule in 'Day' View. If selected and two or more Employees start at the same time, those Employees will be organized alphabetically

- Name (A-Z)
- Name (Z-A)
- Most Scheduled Hours
- Least Scheduled Hours

9) Start With Template Selector - This enables the Scheduler to select the desired Schedule Template to help create the upcoming week's Schedule. Templates can be added, edited, and deleted at any time by selecting a Template and selecting the corresponding Start With Template Options (#10). Multiple Templates can be created, and Scheduler's can switch between them using the Start With Template Selector

- **Note:** Each time a template is selected, the system will compare any availability changes and Employee requests to listed Shifts. If a Shift is in conflict with one or both of these areas, it will be moved to the 'Unassigned' section of the schedule

10) Start With Template Options - The listed options will enable the following to occur:

- USE - This will populate the current Schedule with the selected Template
- 🖫 - This will save the changes made to the selected Template
- ⧉ - This will copy a selected Template
- ＋ - This will allow the User to create a new Template from the selections made
- 🗑 - This will delete the saved Template from the Start With Template Selector (#9)

11) Start With Prior Week - This will start your current Schedule with the Shifts from a prior week. When selected, a week selector will appear, where the desired week can be chosen to start with. A 'Prior Week Use' modal will then appear where Scheduled Jobs or entire Departments can be selected to either 'Add To' or 'Overwrite' the week's Schedule for those Jobs/Departments

12) Delete & Print Options:

- <u>Delete</u> **-** This will open the 'Delete Schedule' confirmation window, which contains the following options:

  - **Current View** - When clicked, all unpublished shifts displayed in the current view will be deleted. This includes assigned and unassigned shifts.

  - **Entire Schedule** - When clicked, all unpublished shifts for the entire schedule will be deleted. This includes assigned and unassigned shifts, even if they are not currently displayed.

- <u>Print</u> **-** This will open the 'Print Options' sidesheet. Learn more about <u>Print Options here.</u>