

Visual Scheduling: Rolling a Schedule Template Forward

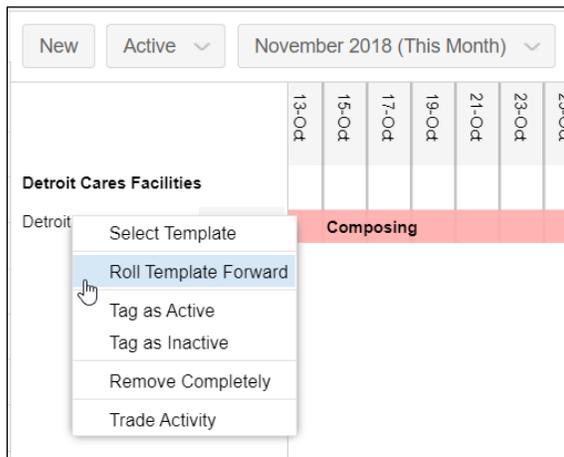
Job Aid

To create a new schedule template for the next scheduling period, you can roll your master template forward. Your master template, defined during your system implementation, is a blueprint of your ideal schedule with optimal shifts and coverage. If you made changes to your template in the previous scheduling period, those changes will not be rolled forward to your new template.

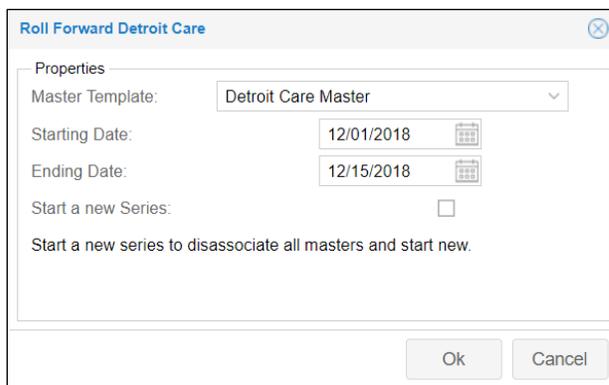
When the master template is rolled forward, existing roster schedules are pulled into the new template. You can begin work on the next scheduling period having only to fill gaps in coverage.

To roll a master template forward:

1. Click the template name in the dashboard and select **Roll Template Forward**.



2. Select the master template. If there is a single master for this template, it is presented as the default master template.



If you select Normal, you will rollover your current template with all of the changes you have applied during the scheduling period. Template Overlay can be used to compare your current schedule template with the master template. For information about how to use template Overlay, see the “Viewing Master Template Overlay” section below.

3. Change the date values if needed. Date values default to the week immediately following the week of the current schedule template.
4. Do not enable the Start a new Series checkbox. This will disassociate the newly created master from the rolled forward master and start a new master.

A series is a sequence of schedule templates that originate from the same master template. Templates that are rolled forward from the same master creates a series.

You can roll a template forward any time during the current scheduling timeframe, however, you should leave enough time to review the template and add schedules or adjust staffing numbers if needed before employees interact with it in the published stage.

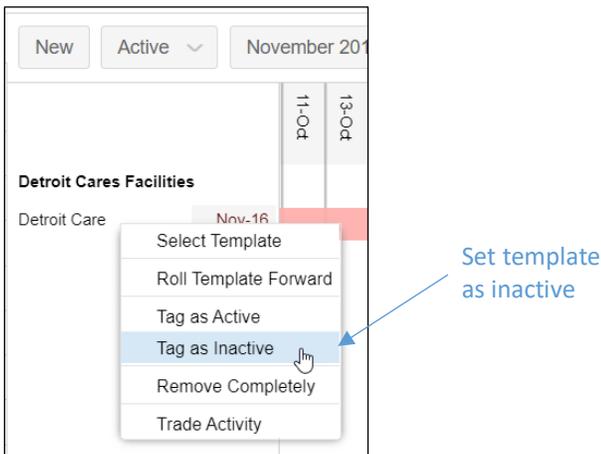
If your Visual Scheduling templates are configured to update the number of staff needed per schedule based on updated census counts, template review for staffing levels will not be necessary.

Make Previous Template Inactive

Once the current template has completed the Live stage, you can place the template in inactive status to prevent it from appearing in your dashboard. You can still view the inactive templates if you select Inactive from the menu in the dashboard.



A template can be set as inactive by clicking the template name and selecting **Tag as Inactive**.

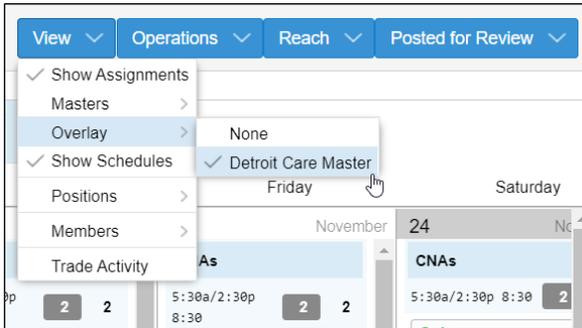


To activate an inactive template, click the template name in the dashboard and select **Tag as Active**.

The **Remove Completely** template option will remove your template from the dashboard. Note that there is no record retained of the template once it has been removed.

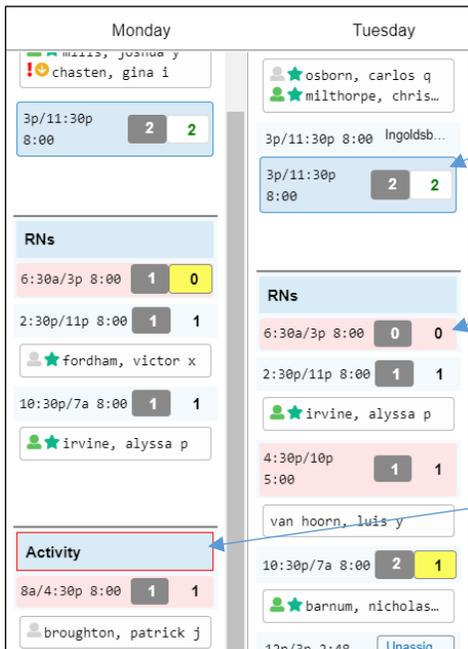
Viewing Master Template Overlay

To view the master template Overlay, Click the View member in the schedule template page and select Overlay and the master template.



The overlay view will display differences in coverage schedule numbers:

- Red highlighted schedule indicates a difference in coverage schedule assignments between the current schedule template and the master.
- Position with red outline indicates the position has been added to the schedule template but not the master.
- Blue highlighted schedule indicates a schedule that is present in the master but not in the schedule template.



Schedule in master template not in schedule

Number of employees needed for coverage schedule is different between schedule template and master template

Position added to schedule template was not added to the master template

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