



Create a Schedule Faster

Quick Start Guide

Document Details

Document #: 160_QS130_220929

Release Version: 1.3.x

Version Release Date: October 2016

Overview

This guide will show you how to copy a past schedule, save a schedule template, and create templates for common shifts. All these tools will help you create a labor schedule in minutes.



Be sure to grab the latest version of this document here:

<https://links.crunchtime.com/TWQS-CreateAScheduleFaster>

OR by scanning the QR code to the left.



Watch the tutorial on MainCourse:

<https://links.crunchtime.com/TWX103mewq>



Copy a Schedule

Overview

Copying a schedule uses the shifts from a previous week in the schedule you're currently creating, saving you a lot of time when making a schedule for a typical week.

Copy a Schedule

Teamworx > Manage Schedules

CRUNCHTIME! TEAMWORX

Kim Possible 304 - Portland

Create New

1 Manage Schedules

2

3

4

5

6

Week Ending Date

09/18/2022 Kim Possible

Select Week Ending Date: 10/09/2022

Copy Existing Week Ending Date: (optional) 10/02/2022

☒ Copy with employees

Submit Cancel

- 1 From the Manager Console, select *Manage Schedules*.
- 2 Select *Create New*.
- 3 Pick the week you are scheduling from the *Select Week Ending Date* drop-down menu.
- 4 Select the past schedule you would like to use from the *Copy Existing Week Ending Date* drop-down menu.
- 5 Select *Copy with Employees* to include the team members that were scheduled on the copied week (optional). When this box is not checked the schedule will be created with all shifts Unassigned.
- 6 Select *Submit* to create a new schedule using the shifts (and employees if selected) from the copied week.





Favorite a Schedule

Star a Schedule

Did you just make a great schedule? Starring that schedule will make it super easy to find and use again.

The screenshot shows the 'Teamworx > Manage Schedules > Labor Schedule' page. A star icon next to the 'Labor Schedule' title is highlighted with a green box and labeled '2'. A modal window titled 'Star Schedule' is open, showing a text input field with 'High Volume Week' (labeled '3') and two buttons: 'Star & Save' (labeled '4') and 'Save'. The background shows a week view for October 2022 with employee schedules for Chris Stabler and Courtney Tyler.

1. Open a Teamworx labor schedule.
2. Click or tap the *Star* icon.
3. Enter a description of the schedule (optional).
4. Select *Star & Save*.

Use a Favorite Schedule

Once a schedule has been starred, it can be easily found when creating a new schedule.

The screenshot shows the 'Teamworx > Manage Schedules: Create New' page. The 'Create New Schedule' form has a 'Copy Existing Week Ending Date: (optional)' dropdown menu highlighted with a green box and labeled '1'. The dropdown list is open, showing 'None' and '10/09/2022 ★ High Volume Week' (labeled '2'). The '10/09/2022' date is highlighted in orange text. The 'Submit' button is visible at the bottom left.

1. When creating a new schedule, select the *Copy Existing Week Ending Date* drop-down menu.
2. Favorite schedules will appear at the top of the list. A star and the schedule description (if entered) will be displayed in **orange text**.





Shift Templates

Overview

Shift Templates allow you to build and reuse schedules for days that differ from an ordinary schedule, such as a holiday. You can either save an existing schedule or use the Shift Builder to create a template for a specific occasion.

Save Shift Template

An existing schedule can be saved as a Shift Template with just a few steps.

The screenshot shows the Teamworx Labor Schedule interface. An orange arrow points to the 'Wand' icon in the top right corner of the 'Day View' section. A green box highlights the 'Wand' icon, and a numbered list indicates the steps: 1. Select the Wand icon. 2. Choose 'Save Shift Template As' from the drop-down menu. 3. Enter a name for the template. 4. Write a description for the template (optional). 5. Select 'Submit' to create a new template with this schedule.

The 'Create New Scheduling Template' dialog box is shown, with the following fields and options:

- Enter Template Name:
- Description:
- Buttons:

- 1 Select the *Wand* icon.
- 2 Choose *Save Shift Template As* from the drop-down menu.
- 3 Enter a name for the template.
- 4 Write a description for the template (optional).
- 5 Select *Submit* to create a new template with this schedule.



Note: You must be creating or editing a schedule on Day View to save or load a Shift Template.

(Continued)



Shift Templates

(Continued)

Shift Builder

The Shift Builder allows you to edit existing Shift Templates and create new ones. Any templates that were saved using the previous steps will appear here and can be edited as needed.

The screenshot shows the Teamworx Shift Builder interface. On the left is a Manager Console with a sidebar menu. The main area displays a list of existing templates. A modal window titled 'Create New Scheduling Template' is open on the right, allowing the user to enter a new template name, optionally select an existing template to copy, and enter a description. A 'Submit' button is at the bottom of the modal.

Teamworx > Shift Builder

CRUNCHTIME! TEAMWORX

Schedule Overview
Daily Roster
Manage Schedules
Shift Builder
Manager Log
Staff Requests

Shift Builder

Search by Name

Template Name ↑	Created By
Mother's Day	Kim Possible 09/21/2022 1:55 PM

Create New Scheduling Template

Enter Template Name: Halloween

Copy Existing Template: (optional)

Description: Holiday on 10/31 - Staff can wear costumes! 🎃

Submit Cancel

- 1 Select *Shift Builder* from the Manager Console.
- 2 Select *Create New*.
- 3 Enter a template name.
- 4 To use another template as a foundation, select a template from the *Copy Existing Template* drop-down (optional).
- 5 Enter a description of the new template (optional).
- 6 Select *Submit*.

(Continued)



Shift Templates

(Continued)

Shift Builder (continued)

Teamworx > Shift Builder: Create New

CRUNCHTIME! TEAMWORX

Shift Builder

10 min 15 min **30 min** 60 min Name: Halloween 304 - Portland ☒ Active

☒ Paid ☐ Unpaid ☒ Work ☐ Non-Work Labor Violations

Save **Cancel**

Station	×	Skill & Rate	Shift Hrs	6AM	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM	8PM	9PM	10PM	11PM
Back of House Payroll																					
Cleaning Crew +																					
1 x	Dishwasher	8.50																			
2 x	Dishwasher	8.50																			
Cook, Line +																					
1 x	Grill	8.50																			

- Click or tap on the Add (+) icon.
- Select a *position* from the drop-down menu.
- Drag to paint the hours for each shift.
- Select Save to finish the template.

Use a Shift Template

Teamworx > Manage Schedules: Edit Schedule

Labor Schedule

CRUNCHTIME! TEAMWORX

Save Cancel KP Kim Possible 304 - Portland

Day View Sep 26 - Oct 2, 2022

MON 26 TUE 27 WED 28 THU 29 FRI 30 SAT 1 SUN 2

☒ Paid ☐ Unpaid ☒ Work

Auto-Schedule Open Shifts

Undo Auto Schedule

Load Shift Template

Save Shift Template As

- From a new schedule, select the Wand icon.
- Select Load Shift Template.
- Choose a Template from the pop-up menu. The selected template will be applied to the labor date you are currently editing.

Select Shift Template

Search by Name

☐ Show all locations ☒ Active only

Template Name ↑	Status	Location
No Template		
Halloween	Active	304 - Portland
Mother's Day	Active	304 - Portland





Common Shifts

Overview

Use Common Shifts to create templates for your most frequently used shift, so you don't have to recreate the shifts from week-to-week.

Getting Started

The screenshot shows the Teamworx Shift Builder interface. On the left, a dark blue sidebar contains a menu with items: Schedule Overview, Daily Roster, Manage Schedules, Shift Builder (highlighted with a green box and a '1' in a white box), Manager Log, Staff Requests, and Message Center. Above the sidebar, an orange banner reads 'Teamworx > Shift Builder'. The main content area has a dark blue header with the 'CRUNCHTIME! TEAMWORX' logo on the left and a user profile 'KP Kim Possible 304 - Portland' on the right. Below the header, the 'Shift Builder' title is centered. To the right of the title are two buttons: 'Common Shifts' (highlighted with a green box and a '2' in a white box) and 'Create New'. Below these buttons is a search bar labeled 'Search by Name' and two checkboxes: 'Active only' (checked) and 'Show all locations'. A table follows with columns: Template Name, Created By, Last Modified, Status, Location, and Actions. The table contains one row for 'Mother's Day' created by 'Kim Possible' on '09/21/2022 1:55 PM', last modified by 'Kim Possible' on '09/29/2022 2:29 PM', with status 'Active' and location '304 - Portland'. An 'Edit' button is in the Actions column.

- 1 Select *Shift Builder* from the Manager Console.
- 2 Click or tap the *Common Shifts* button.

(Continued)



Common Shifts

(Continued)

Create Common Shift

Teamworx > Shift Builder: Common Shifts

CRUNCHTIME! TEAMWORX

KP Kim Possible 304 - Portland

Common Shifts

☐ Paid ☐ Unpaid ☒ Work ☐ Non-Work

10 min 15 min **30 min** 60 min

	Name	Station	Skill & Rate	Shift Hrs	Shifts														
					6AM	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM	8PM
All Positions +																			
Back of House Payroll																			
Cleaning Crew +																			
1 x	Opening Dishwasher	Dishwasher		9.00															
2 x	3:00 PM - 9:00 PM	Dishwasher		6.00															
Cook, Line +																			
1 x	Closing Grill	Grill		8.00															

- 3 Select the *Add (+)* icon to enter a new shift for a particular Position.



Tip: Adding a shift under “All Positions” will allow you to schedule that shift for any position.

- 4 Enter a *Name* for the shift to make it easily recognizable. If left blank, the name will automatically be set to the shift start and end time.
- 5 Select a *Station* (optional).
- 6 *Drag to paint* the shift schedule onto the grid.
- 7 Select *Save*.

A



Note: If you want to disable Common Shifts for a particular position, select the *Cancel* icon. When selected, the icon will turn red, and the shifts for this position will be greyed out. The option to add Common Shifts for this position will no longer be visible on the labor schedule.

(Continued)



Common Shifts

(Continued)

Apply Common Shifts

Teamworx > Manage Schedules: Edit Schedule

Labor Schedule ☆ CRUNCHTIME! TEAMWORX Publish Save Draft Cancel KP Kim Possible 304 - Portland

Day View Oct 10 - 16, 2022 Week View

MON 10 TUE 11 WED 12 THU 13 FRI 14 SAT 15 **SUN 16**

☐ Paid ☐ Unpaid ☒ Work ☐ Non-Work Override Availability

Station × Employee ↑ Filter Dly Hrs Wkly Hrs Shift Hrs

Shifts 6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

2 Opening Dishwasher
3:00 PM - 9:00 PM

Cleaning Crew + ... 1

1 × Dishwasher Samantha Taggert 5.50 30.00 5.50

Cook, Line +

- 1 Click or tap on the *ellipses* (•••) for the position you would like to schedule.
- 2 Select the *Common Shift* from the pop-up menu. A new line will be added to the schedule with the chosen shift.

