



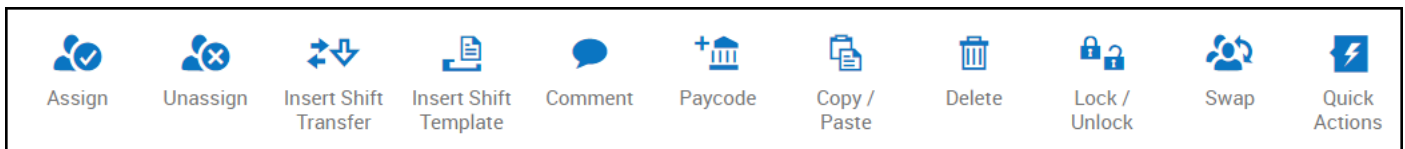
Quick Actions

Quick Actions are one-click shortcuts in the action bar that you use to complete repetitive tasks, speed up data entry, and reduce errors.

How Quick Actions work

Quick Actions operate a little differently from other buttons and controls:

1. Click **Quick Actions** and select a Quick Action.
2. Click the item you want to modify or take action on. If the action is associated with two items, you must also click the second item.



Example: Open the **Quick Actions** action bar, select **Copy / Paste**, then click the item to copy and click the target cell to paste it in. To paste the same item in many cells, just continue clicking the target cells one by one. The software pastes the copied item in each cell as you click.

When you select a Quick Action, it remains enabled until you disable it. You can continue clicking additional days or shifts to apply the same action. There is no need to select the Quick Action icon again when you do this.

Note: When a Quick Action is enabled, the Information Bar just above the Quick Actions action bar tells you what to do next.

1. When you are finished with a Quick Action, click it again to disable it. If you do not disable it, the next item you select will have the selected Quick Action applied to it.

There are two other ways to disable a Quick Action when you are finished with it:

- Click **Quick Actions**.
- Click **Close** at the right end of the Information Bar.

Available Quick Actions

The following is a list of all Quick Actions included in the software.

Assign

What: Assigns open shifts to employees.

How: Click the open shift, then click the employee. Repeat as needed.

If break rules are violated, reassign the breaks:

1. Right-click the shift.
2. Click **Assign Breaks** in the glance.

Note: If the employee's primary job does not match the job of the open shift, the segment becomes a transfer job. Work rule or labor level transfers remain the same.

Unassign

What: Unassigns an assigned shift to create an open shift.

How: Click an assigned shift. An open shift is created, having the same job as the shift did before you unassigned it. Click additional assigned shifts as needed to unassign them as well.

Insert Shift Transfer

What: Changes the job for a shift; all segments of the selected shift are assigned the selected job. Other data associated with the shift remain unchanged.

How:

1. Select the job from the list. The list contains only jobs that are included in your current transfer set.
2. Click one or more scheduled shifts.

Insert Shift Template

What: Creates and assigns shifts from a shift template.

How: Select the template from the list that appears, then select a date cell, whether empty or not. Click other date cells as needed to assign the same template to them as well.

Note:

- Search for the name of a template by typing any part of the template name in the search box.
- You cannot assign templates to locked or signed-off days.

Insert Comment

What: Assigns a comment to a shift or a paycode

How: Select the comment from the list that appears, then click a shift or a paycode. Click other entities as needed to assign the same comment to them.

Note: Search for a comment by typing any part of it in the search box.

Paycode

What: Replaces an assigned shift with a paycode.

How: Select the paycode, then click an assigned shift:

- The paycode replaces the entire duration of the shift.

- The system automatically creates an open (unassigned) shift with the same start and end time as the replaced shift.
- Click additional shifts as needed to replace them with the same paycode.

Note: You cannot replace an empty cell, a shift segment, a locked shift, or a shift during a locked or signed-off day.

Copy / Paste

What: Copies and pastes a shift, a paycode, a tag, availability or any combination of these items.

How: On the Copy / Paste click the date cell containing the item or items to copy, then click the date cell where you want the copied item or items to appear. Repeat to paste the same item or items in another cell.

Delete

What: Deletes a shift or a paycode.

How: Click the item to delete. Repeat to delete additional items.

To restore items deleted by mistake, do not save but instead select **Refresh**

Warning: When you refresh the page, you lose all changes since the last save.

Lock / Unlock

What: Locks or unlocks a shift. (You cannot lock or unlock days with this quick action.)

How: Click an unlocked shift to lock it, or a locked shift to unlock it. You can click additional shifts to lock or unlock as needed.

Swap

What: Swap shifts or days with no shifts.

How: Click the first item, then select the second item. Repeat as needed.

Note:

You can swap:

- Shifts or days with no shifts between two employees on the same day. Both employees must be qualified and available.
- Two items between two employees on different days.
- A shift for a paycode between two employees on the same day.
- A paycode for a shift between two employees on the same day
- Swaps between different days do not overwrite other items on the same day.

You cannot swap:

- Items with a group



- Items between the same employee
- Locked shifts
- Paycodes

