How to create a schedule template in HotSchedules

This guide explains how to create a schedule template in HotSchedules from a schedule you have already written and posted. You can then apply the template to a future week, edit the shifts, assign house shifts, and post the finished schedule. The example uses the "Delivery - To Go" schedule for the week of March 23rd.

Templates copy labor data from a specific week so you can reuse it for future scheduling. This saves time and effort.

Prerequisites

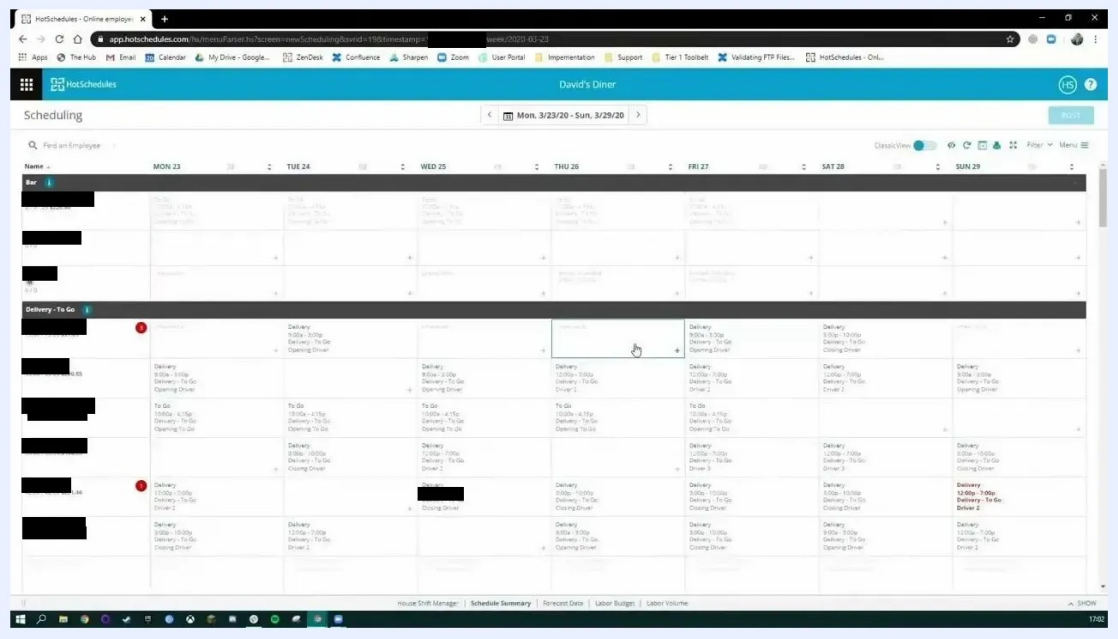
Before you begin, make sure you have:

- Access to the **Scheduling** tab in HotSchedules.
- The correct location and week selected.
- A schedule that is already written and posted, to use as the base for your template.

Create a template from an existing schedule

Step 1: Open the schedule you want to use as your template base

Open HotSchedules and go to the **Scheduling** tab. Check that you are viewing the correct location and the week that contains the schedule you want to copy. In this example, that is the week of March 23rd.



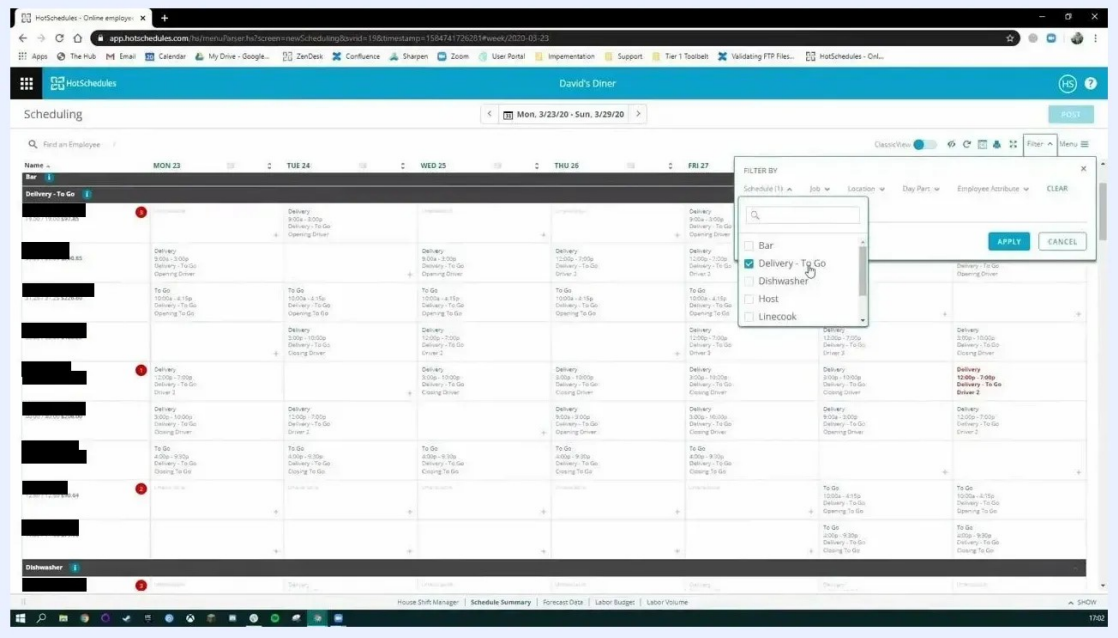
Scheduling screen for the week of March 23rd showing posted shifts for employees under "Delivery - To Go" and other categories, with employee names, job codes, and shift times.

Step 2: Filter the view to one schedule

Filter the screen so you work on only the schedule you need.

- Click the **Filter** button on the scheduling screen.
- In the **FILTER BY** menu, select the schedule (for example, **Delivery - To Go**).

- Click **APPLY** to hide all other schedules.



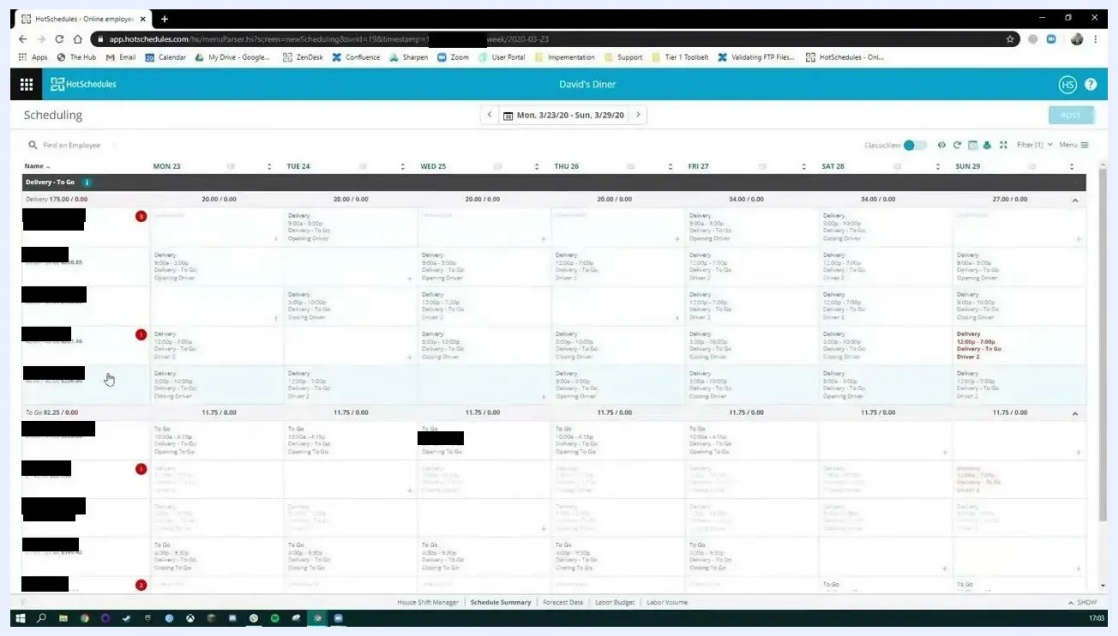
The Filter menu open with "Delivery - To Go" selected, ready to apply.

Step 3: Group job codes for clarity

If the schedule includes multiple job codes, such as "To Go" and "Delivery", group them so they are easier to review.

- Open the menu and go to the settings column.
- Change the **Group By** setting to show both the schedule and the job code.
- Click **Apply**.

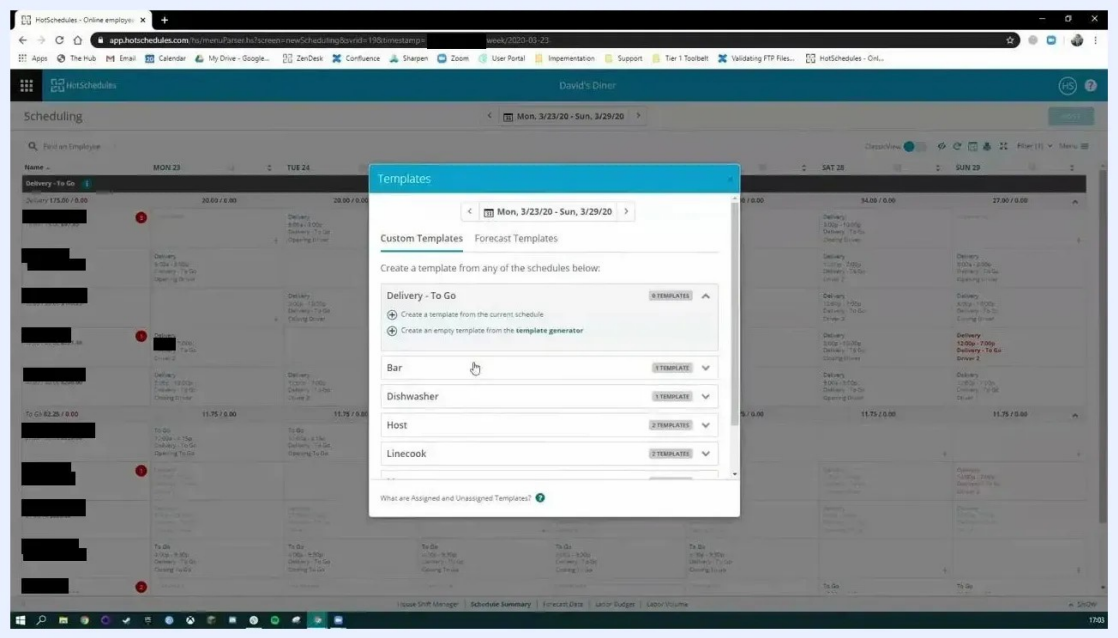
The schedule now shows all delivery drivers together and all to-go specialists together.



The schedule grouped by job code, with delivery drivers and to-go specialists clearly separated.

Step 4: Open the Templates dialog

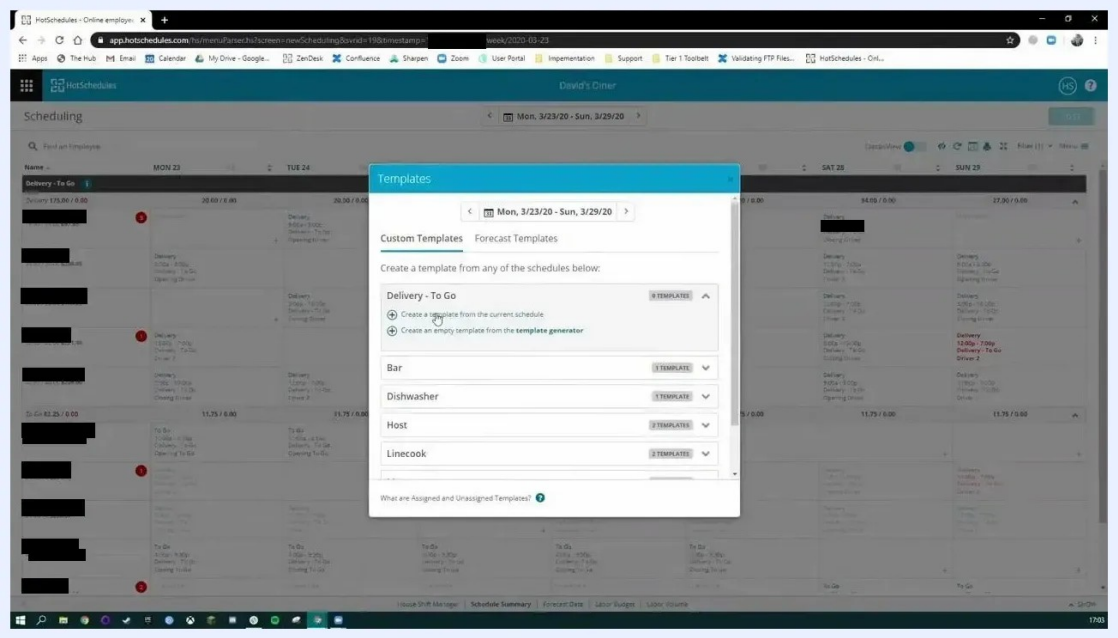
With the schedule filtered and grouped, open the **Menu** and select **Templates**. The **Templates** dialog appears with options for the current week and the available schedules.



The Templates dialog showing options to create a template from the current schedule for "Delivery - To Go" and for other schedules such as Bar, Dishwasher, Host, and Linecook.

Step 5: Create a template from the current schedule

Under **Delivery - To Go**, click **Create a template from the current schedule**. HotSchedules uses the labor data already in place for the selected week as the base for your template.



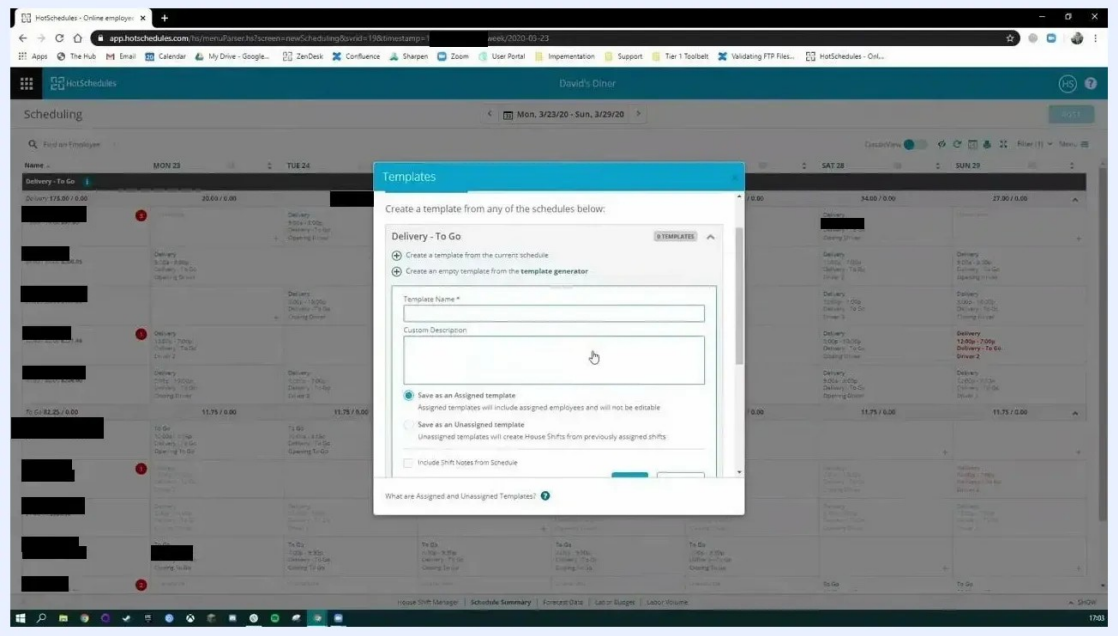
The cursor on "Create a template from the current schedule" under "Delivery - To Go" in the Templates dialog.

Step 6: Choose a template type

The template creation dialog offers two types of template:

- **Save as an Assigned template:** Includes the assigned employees. Shifts are not editable when you apply the template.
- **Save as an Unassigned template:** Creates house shifts from the previously assigned shifts. You can assign them later.

You can create both types for flexibility.



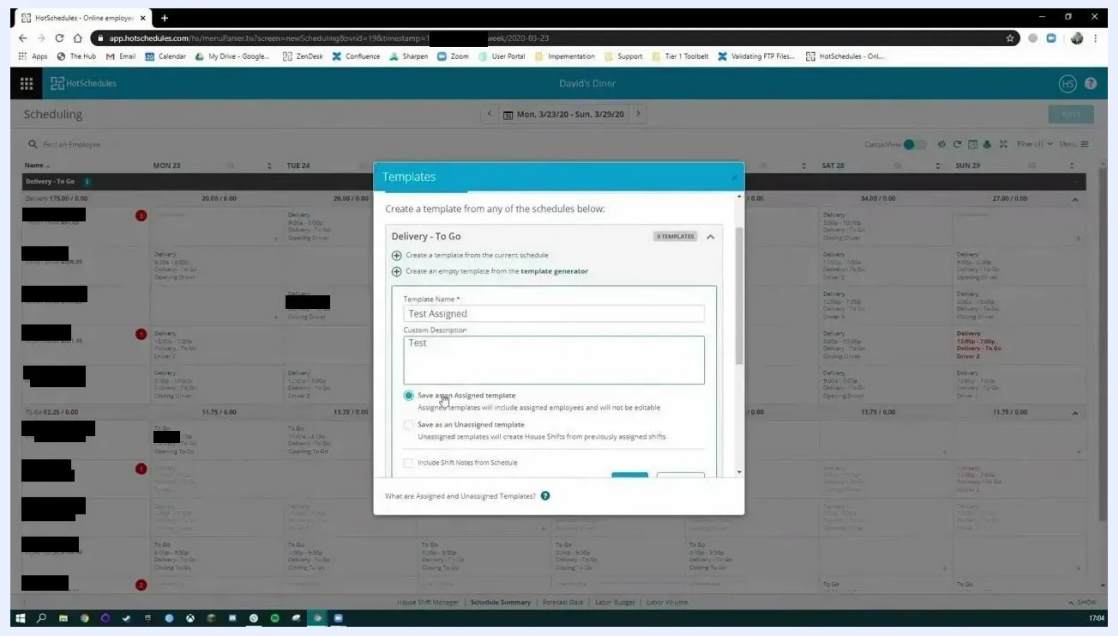
The template creation dialog with fields for Template Name and Custom Description, and options for "Save as an Assigned template" or "Save as an Unassigned template".

Step 7: Save an assigned template

Complete the dialog to create the assigned template.

- Enter a name in the **Template Name** field (for example, Test Assigned).
- Optionally, enter a description in the **Custom Description** field (for example, Test).
- Select **Save as an Assigned template**.

- Click **Save**.



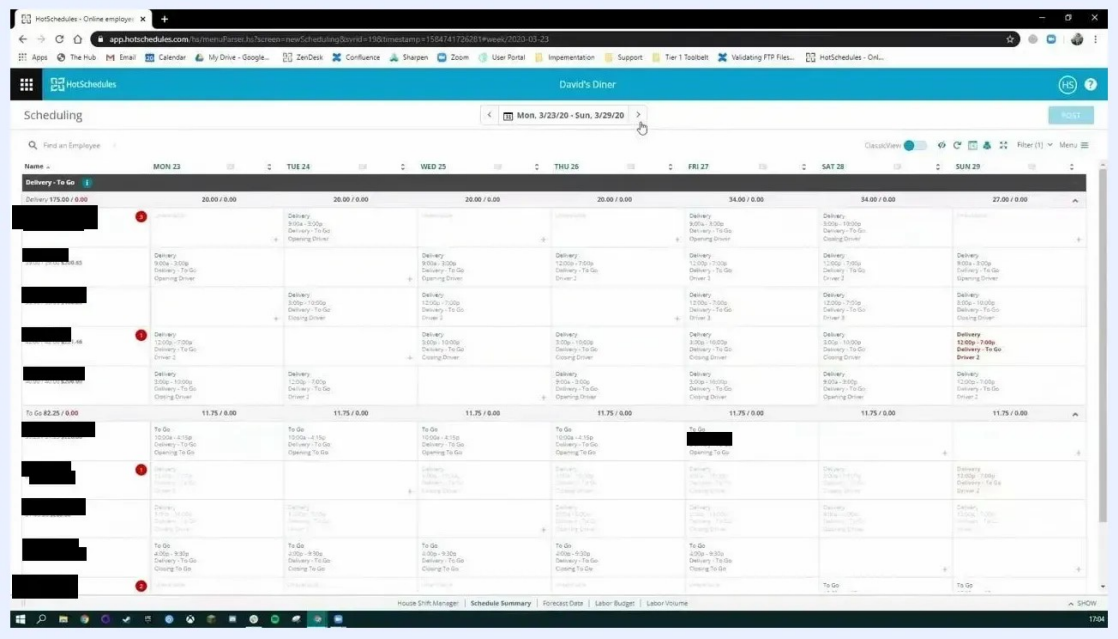
The template dialog filled in with "Test Assigned" as the name, "Test" as the description, and "Save as an Assigned template" selected.

Step 8: Save an unassigned template

Repeat the process to create an unassigned template.

- Enter a name (for example, Test Unassigned).
- Optionally, enter a description (for example, Test).
- Select **Save as an Unassigned template**.
- Click **Save**.

Both templates now appear under **Delivery - To Go** in the **Templates** dialog. Assigned templates carry an **ASSIGNED** badge so you can identify them easily.

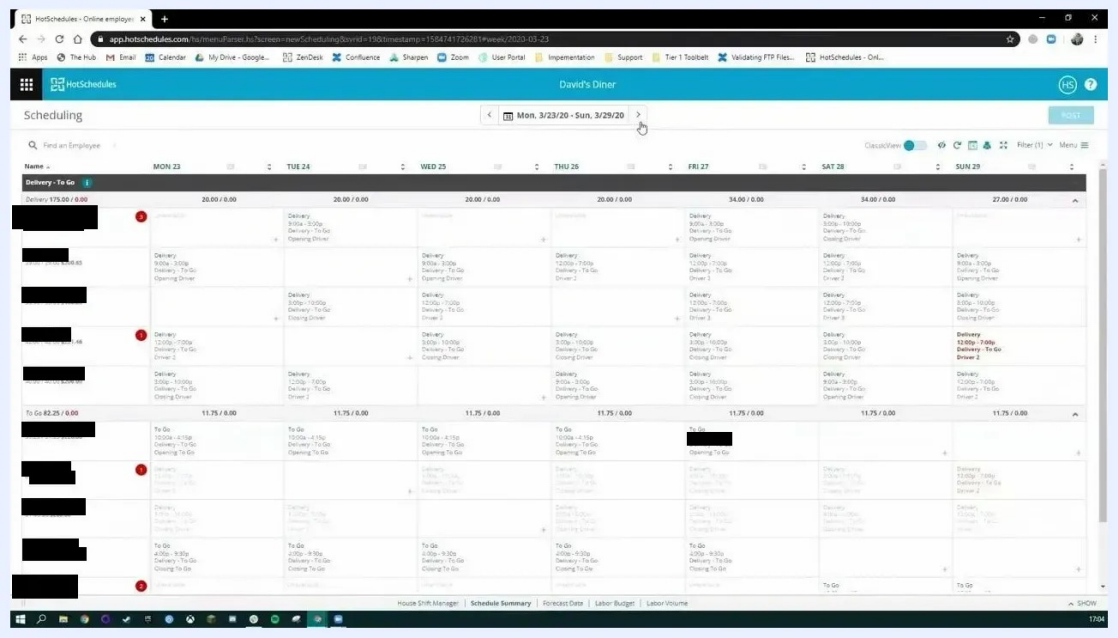


The Templates dialog listing "Test Assigned" (with the ASSIGNED badge) and "Test Unassigned" under "Delivery - To Go".

Apply and edit schedule templates

Step 9: Go to the week where you want to apply a template

Exit the **Templates** dialog. Use the date selector at the top of the scheduling screen to move to the target week (for example, Mon, 3/30/20 - Sun, 4/5/20). The schedule grid for the new week is empty and ready for a template.

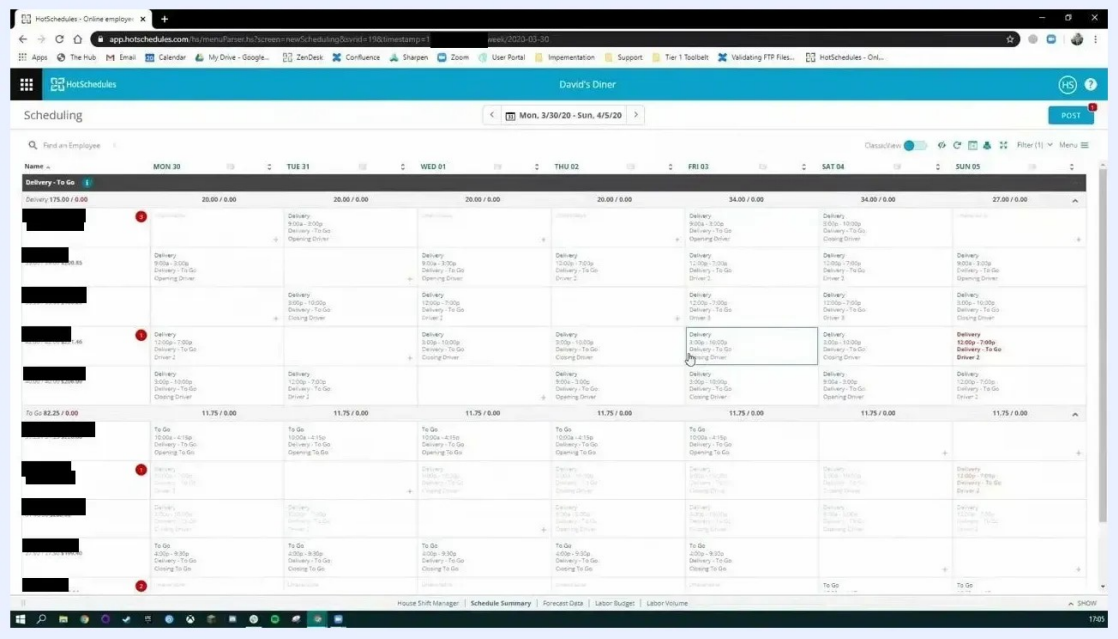


The scheduling screen for March 30th to April 5th with empty schedule grids for "Delivery - To Go" and "To Go".

Step 10: Apply the assigned template

Click the **Menu** button in the upper right corner of the scheduling screen and select **Templates**. Then select your assigned template.

The template fills the schedule grid with the same shifts for the same employees as in the original week. This works much like the **Copy Schedule** tool.



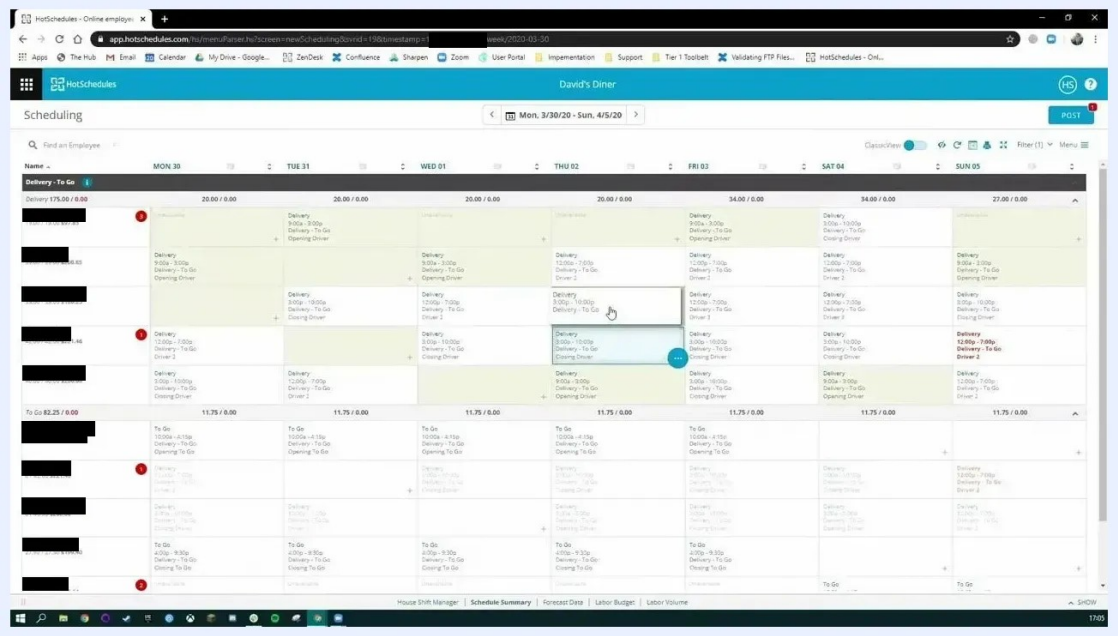
The schedule grid populated with shifts for each employee under "Delivery - To Go" after applying the assigned template, with shift times, roles, and employee names in each cell.

Step 11: Edit shifts after applying the template

You can change the schedule even after you apply a template.

- To move a shift to a different employee, click and drag it to that employee's row.
- To change a shift's start or end time, double-click the shift. In the edit dialog, use the clock radial or the time fields to set new times.

- If you have multiple locations set up, you can also change the shift's location in the edit dialog.



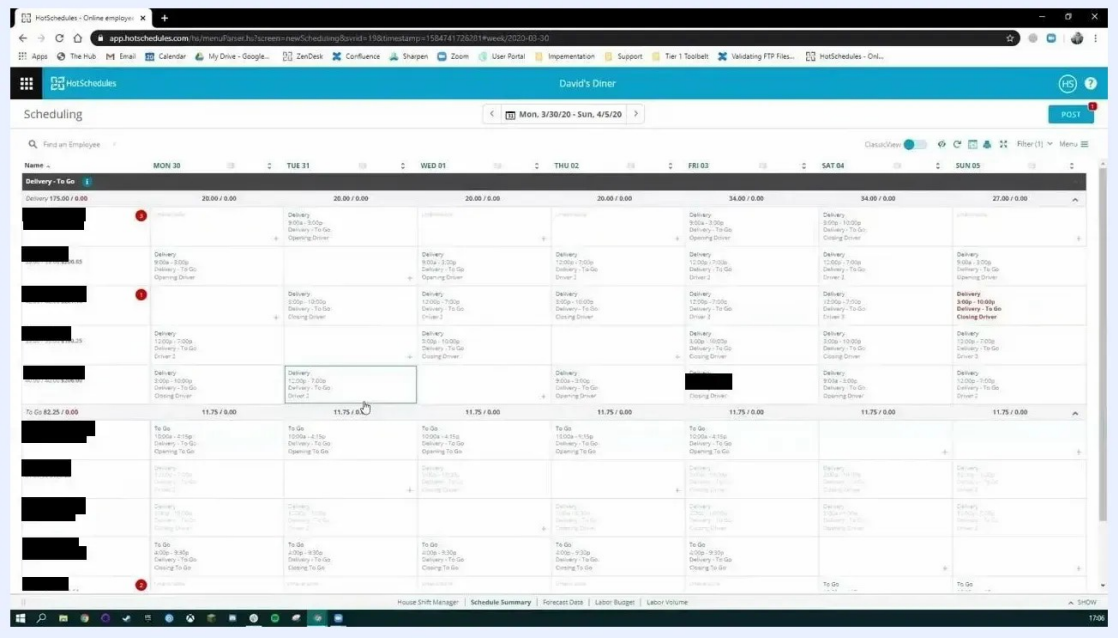
The Edit Shift dialog for "Alfonso Hernandez - Thu, 4/2/20", with fields for date, start and end time, location, schedule, and total hours and pay.

Step 12: Delete the current schedule to apply a different template

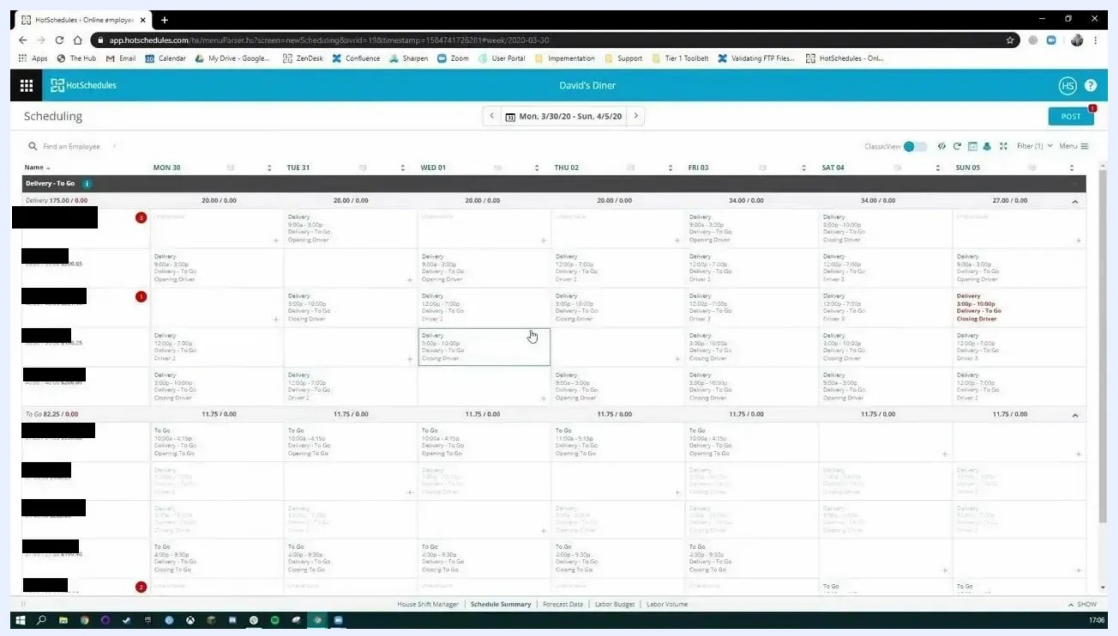
You cannot apply multiple templates to the same schedule. To apply a different template, such as an unassigned one, delete the current schedule first.

- Open the **Menu** in the upper right corner.
- Select **Delete Schedule**.
- Confirm the deletion when prompted.

The schedule grid is now empty and ready for a new template.



The Menu open with "Delete Schedule" highlighted.



The empty schedule grid for "Delivery - To Go" and "To Go" after the deletion, with blank cells showing only "+" icons.

Step 13: Apply the unassigned template

Return to the **Templates** menu and select your unassigned template. The template fills the schedule grid with house shifts, which you can assign to employees as needed.

Assign unassigned shifts

Step 14: Find the unassigned shifts

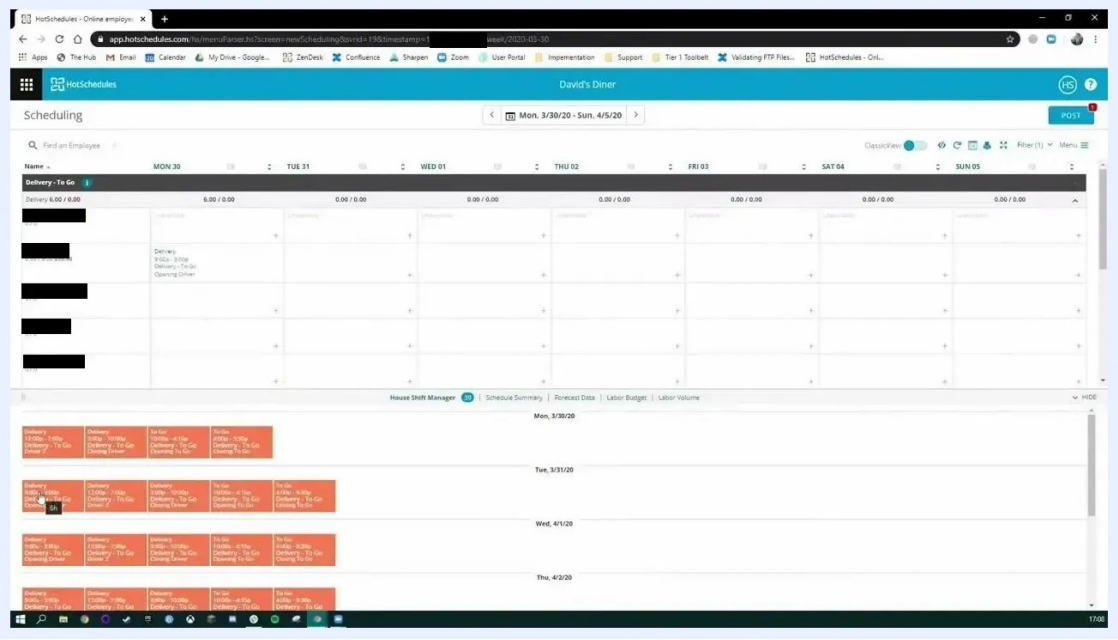
Scroll to the bottom of the scheduling screen to see all unassigned shifts for the week. Each shift box shows:

- The type of shift (for example, "Delivery" or "To Go")
- The time range (for example, "9:00a - 3:00p")
- The role (for example, "Opening Driver" or "Closing Driver")

Step 15: Assign a shift by drag and drop

Click and hold an orange shift box in the unassigned section. Drag it to the employee's row and the correct day column, then release the mouse button.

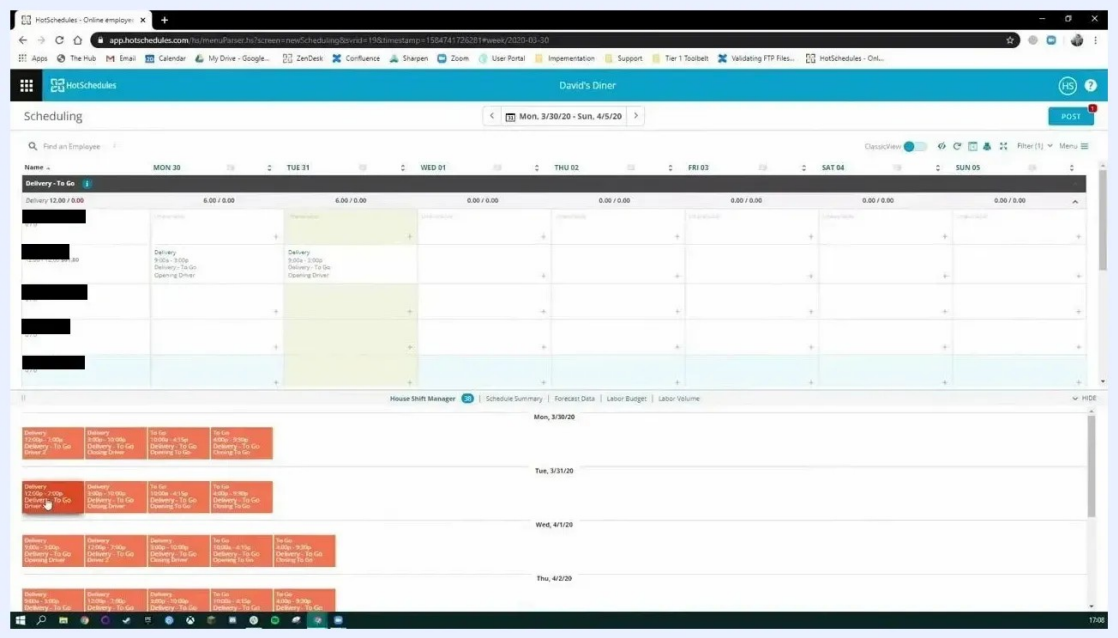
The shift appears in the employee's schedule, and the unassigned shift count goes down. For example, drag "Delivery 9:00a - 3:00p Delivery - To Go Opening Driver" to Abel Garcia on Monday.



A shift assigned to Abel Garcia on Monday, with a lower unassigned shift count.

Step 16: Open the Smart Select tool

Click directly on a shift in the schedule grid to bring up the Smart Select tool. It gives you options for managing or reassigning the shift. The grid highlights available cells and shows visual cues for possible assignments.

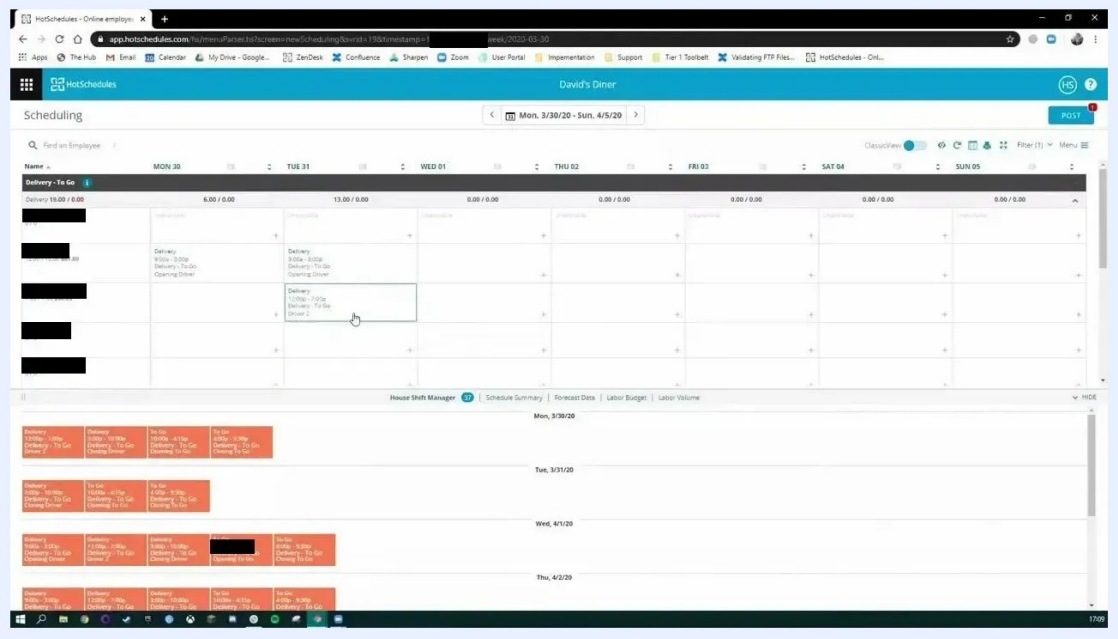


The Smart Select tool active, with available cells highlighted in the schedule grid.

Step 17: Review the employees available for a shift

When you assign a shift, the Smart Select window lists eligible employees. For the "Delivery 12:00p - 7:00p Driver 2" shift, it shows three employees: Anthony Salerno, Bayan Bisso, and Cezario Sanchez.

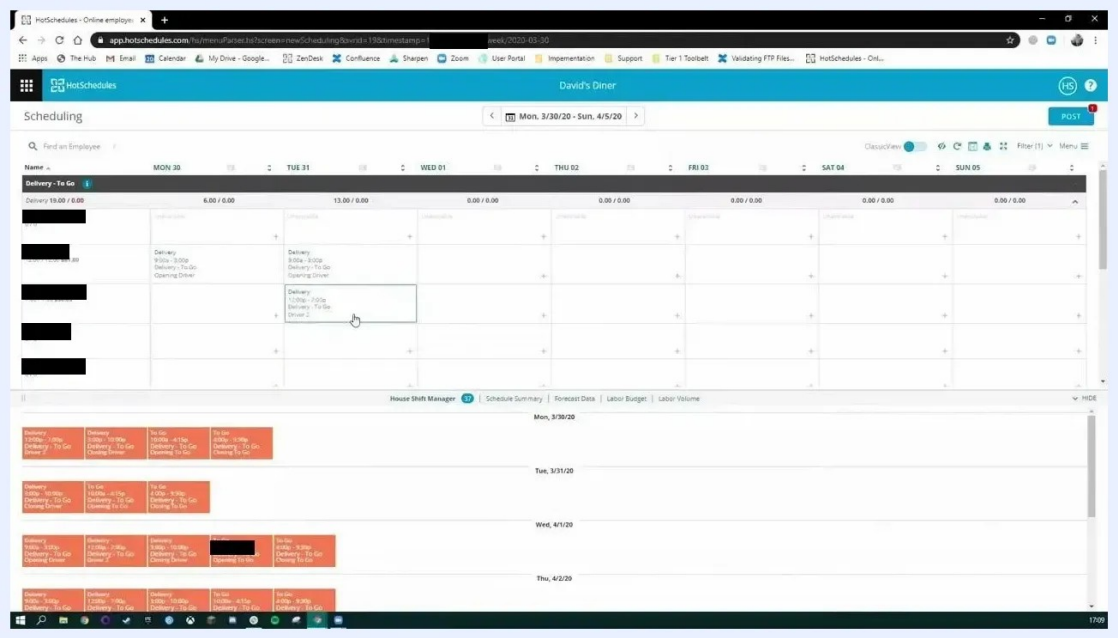
The table shows each employee's name, scheduled hours for each day, total hours, cost, and skill level. Use it to choose an employee for the Tuesday shift.



The Smart Select window listing Anthony Salerno, Bayan Bisso, and Cezario Sanchez with columns for each day, hours, cost, and skill, and the cursor over Tuesday for Anthony Salerno.

Step 18: Assign the shift for a specific day

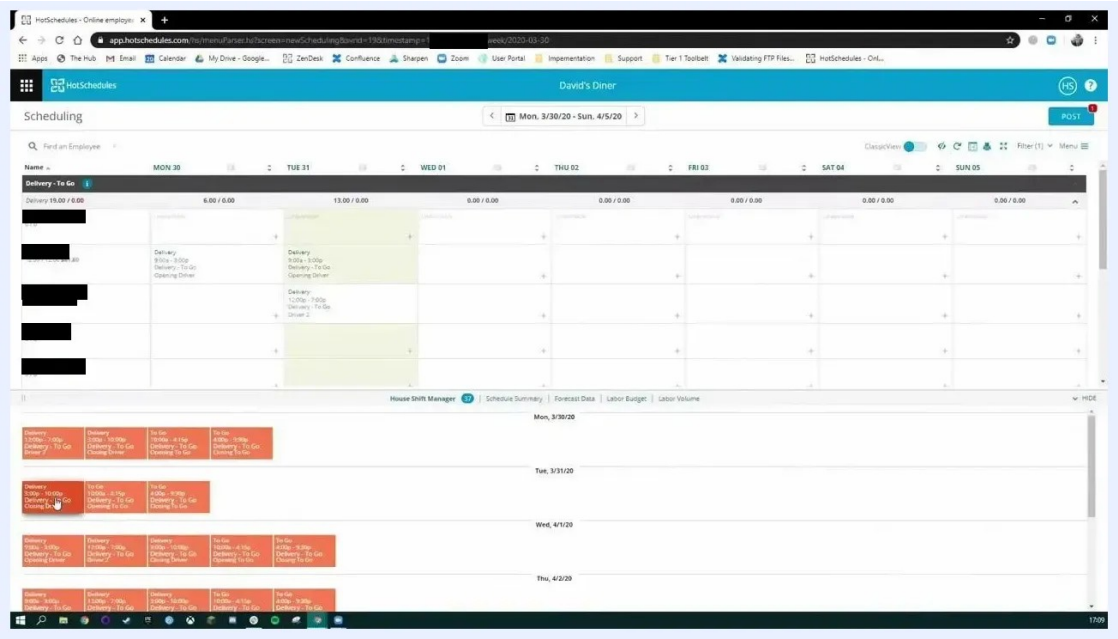
In the Smart Select window, click the day you want (for example, **Tue**) in the chosen employee's row. This assigns the shift to that employee for that day. In this example, you select Tuesday for Anthony Salerno.



The Smart Select window with Tuesday highlighted for Anthony Salerno, ready to assign the shift.

Step 19: Select another unassigned shift

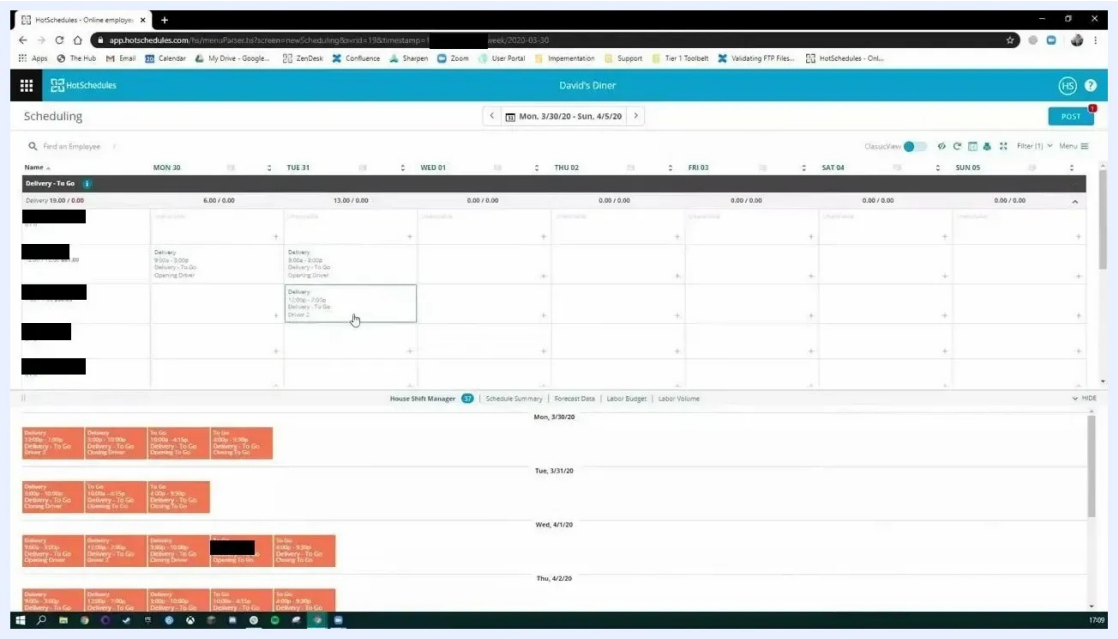
To assign another shift, click it in the orange section at the bottom of the screen. For example, select "Delivery 3:00p - 10:00p Closing Driver". The schedule grid updates to show the newly assigned shift in the appropriate cell.



The schedule grid with the cursor selecting the "Delivery 3:00p - 10:00p Closing Driver" shift from the unassigned section.

Step 20: Check employee hours in Smart Select

The Smart Select window lists eligible employees for the new shift. Review each employee's current hours to avoid over-scheduling. In this example, Abel Garcia already has 12.00/19.00 hours, so you assign the shift to Bayan Bisso instead.



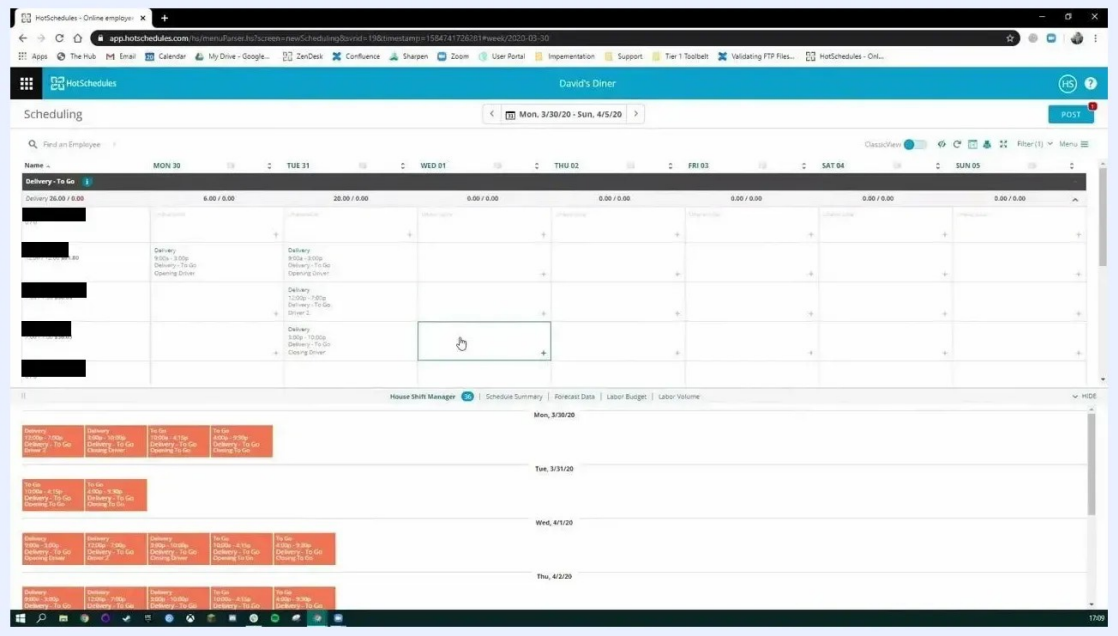
The Smart Select window for "Delivery 3:00p - 10:00p Closing Driver" showing Bayan Bisso, Cezario Sanchez, and Abel Garcia with their scheduled hours.

Step 21: Use Auto Schedule to assign all remaining shifts

To assign all unassigned shifts automatically, open the menu and select **Auto Schedule**, the first option in the list. The **Auto Schedule** window offers these settings:

- Auto schedule house shifts
- Auto schedule currently scheduled shifts
- Allow employees to have more than one shift per day
- Allow shifts to be placed when employee is unavailable
- Honor requests off
- Limit hours based on scheduled hours limits for ACA
- Honor employee schedule thresholds
- Skill level rules (none, threshold, or location-based)
- Maximum allowable hours (for example, 40.0)
- Maximum allowable days (for example, 5)

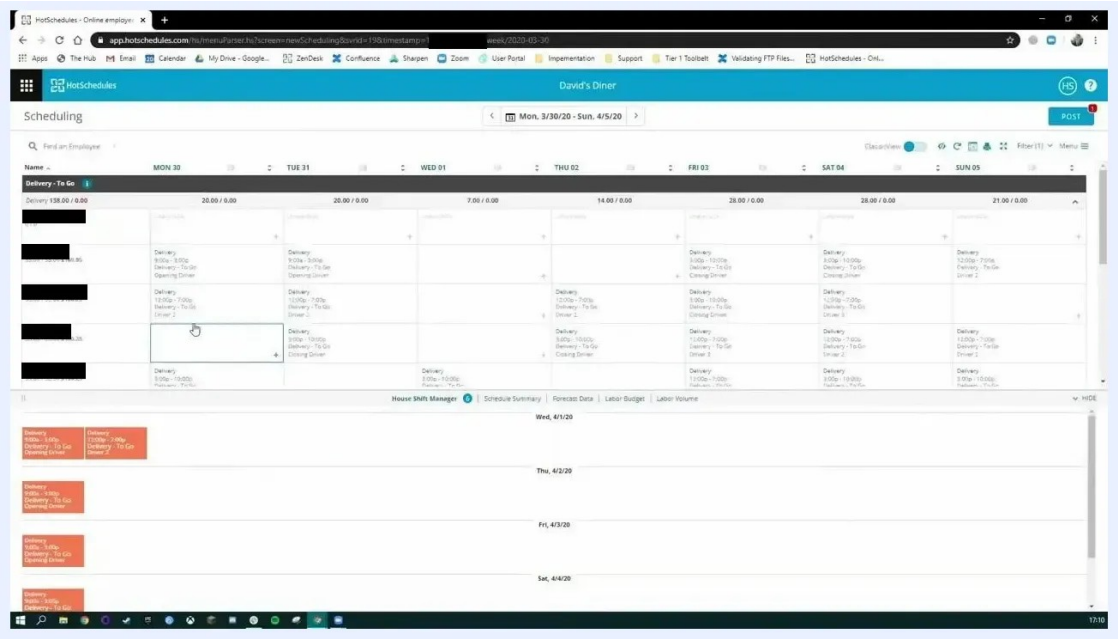
Click **Generate Schedule** to run the auto-scheduler.



The Auto Schedule window with its configuration options and the Generate Schedule button highlighted.

Step 22: Review the auto-scheduled results

The schedule grid updates with shifts assigned to their best-matched employees. Some shifts may stay unassigned if no eligible employees are available or if constraints prevent assignment. In this example, most shifts are filled and a few orange unassigned shifts remain at the bottom.



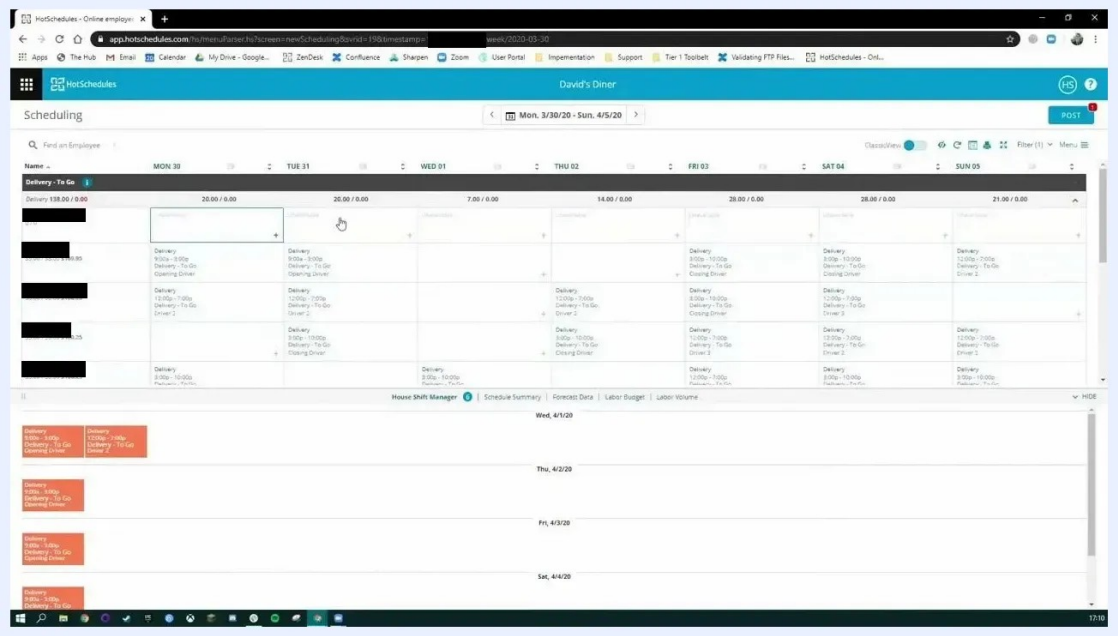
The schedule grid after auto-scheduling, with most shifts assigned and a few orange unassigned shifts at the bottom.

Finalize and post the schedule

Step 23: Review remaining shifts and employee availability

Check the schedule grid for any unassigned shifts, which appear in orange at the bottom. The auto-scheduler does not assign shifts to employees who have marked themselves as unavailable.

The grid lists employee names in the left column and days of the week across the top. Each cell shows assigned shifts or indicates unavailability.

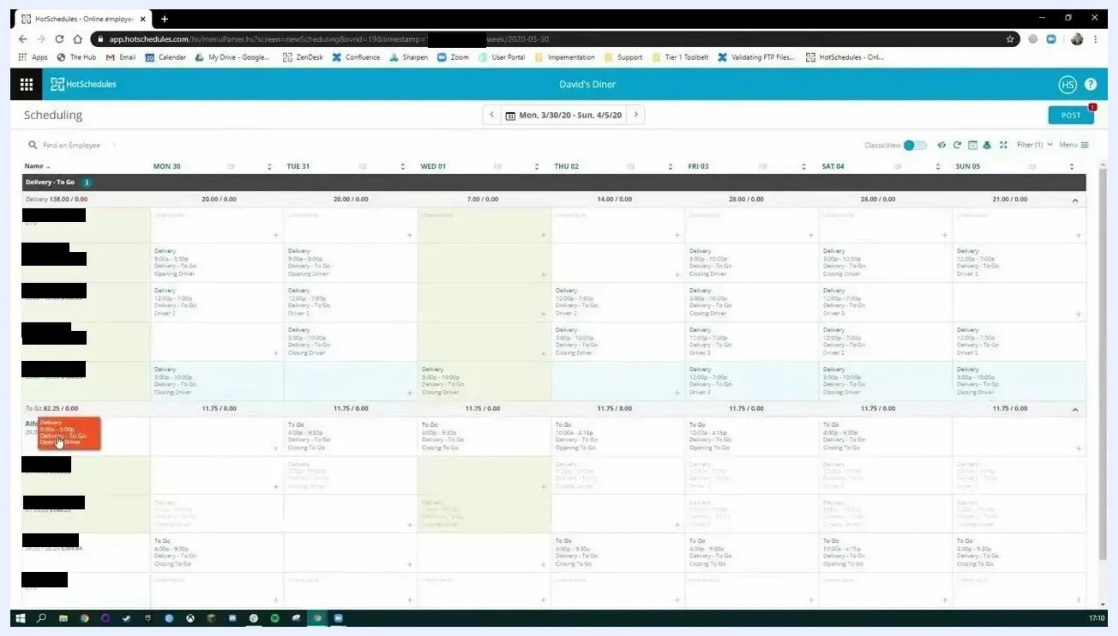


The schedule grid showing employees, assigned shifts, and unassigned shifts at the bottom, with some cells marked "Unavailable".

Step 24: Assign the remaining shifts manually

Find an unassigned shift in the orange section, such as "Delivery 9:00a - 3:00p Delivery - To Go Opening Driver". Drag it to the employee and day you want (for example, Wednesday for Abdul Marchoud), then drop it into the cell.

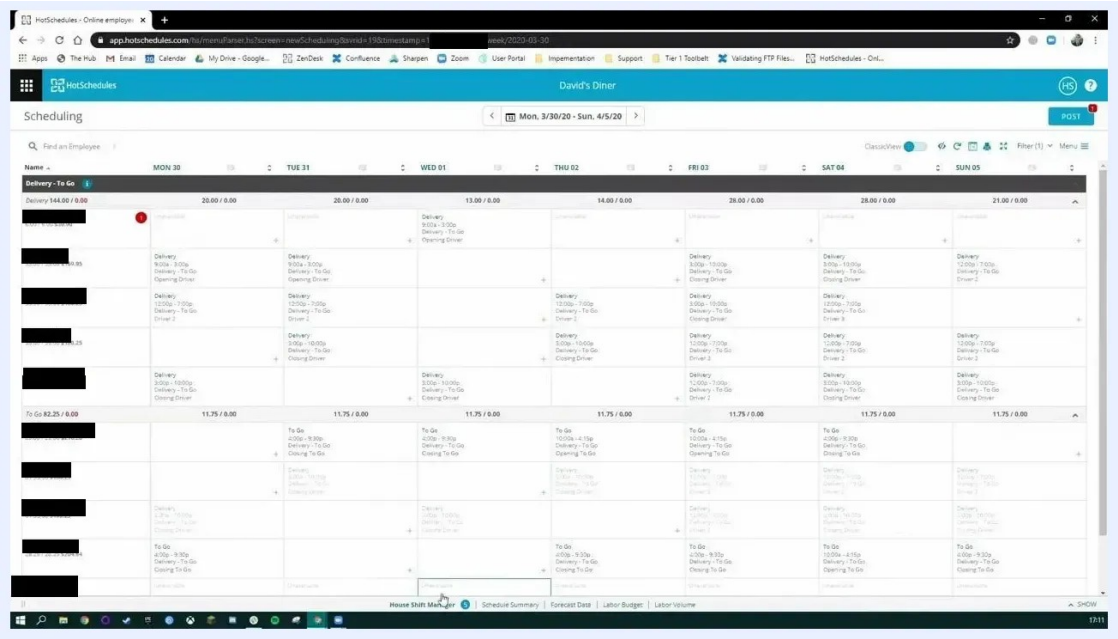
Confirm that the shift now appears in the correct cell. The orange unassigned shift disappears from the bottom section once you assign it.



An orange unassigned shift being dragged to an employee's cell for Wednesday.

Step 25: Manage house shifts

Shifts that remain in the House Shift Manager are available for pickup by eligible employees. To remove unnecessary house shifts, open the House Shift Manager and delete or edit them as needed. You can open it from the tab at the bottom of the schedule grid.

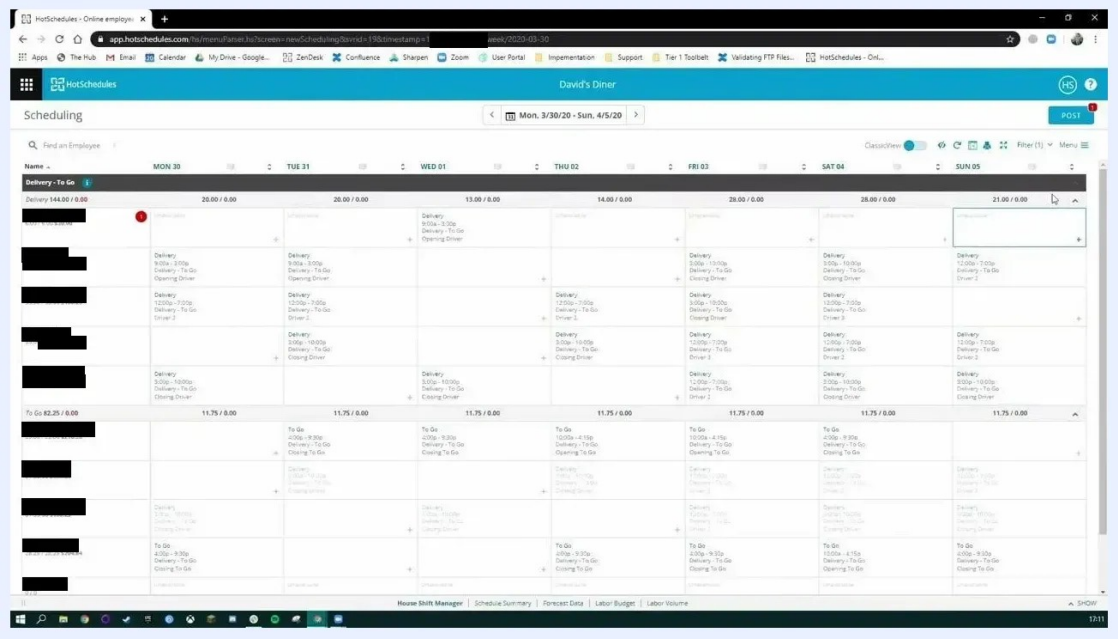


The schedule grid with the House Shift Manager tab visible at the bottom, showing the remaining house shifts.

Step 26: Post the schedule

When all the shifts you want are assigned, click the blue **POST** button in the upper right corner of the screen to publish the schedule. A confirmation or notification may appear.

After posting, a green notification bar appears at the bottom of the screen and reads "Schedules Posted." The schedule grid reflects all assigned shifts, and employees can view their schedules.



The schedule grid with the cursor near the POST button in the upper right corner, ready to publish.

Summary

You now know how to create a schedule template in HotSchedules and use it. You filtered and grouped an existing schedule, saved both assigned and unassigned templates, and applied them to a new week. You then edited shifts, assigned house shifts with drag and drop, Smart Select, and Auto Schedule, and posted the schedule.

This process combines the efficiency of auto-scheduling with the flexibility of manual adjustments. It keeps coverage optimal and respects employee availability.

What's next

- Create templates for other schedules listed in the **Templates** dialog, such as Bar, Dishwasher, Host, and Linecook.
- Apply your saved templates to future weeks to reduce the time you spend scheduling.