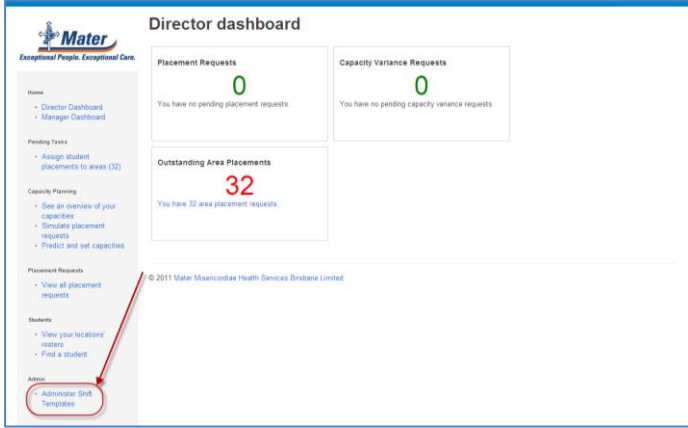
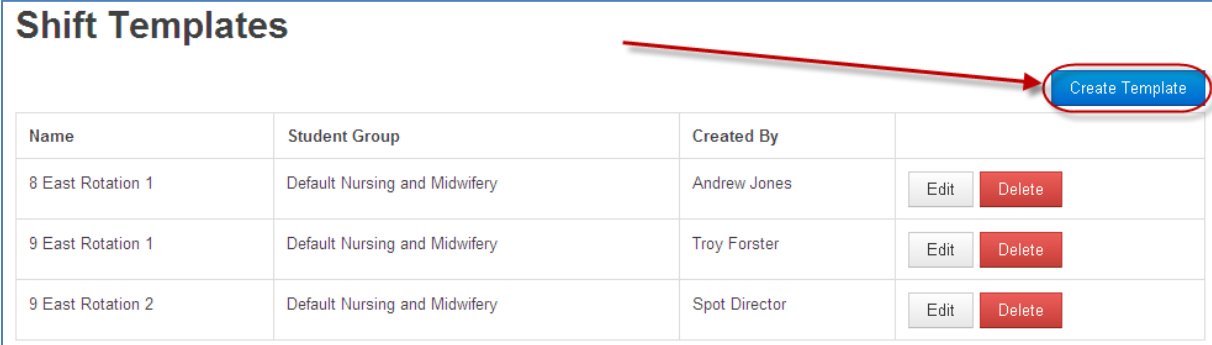
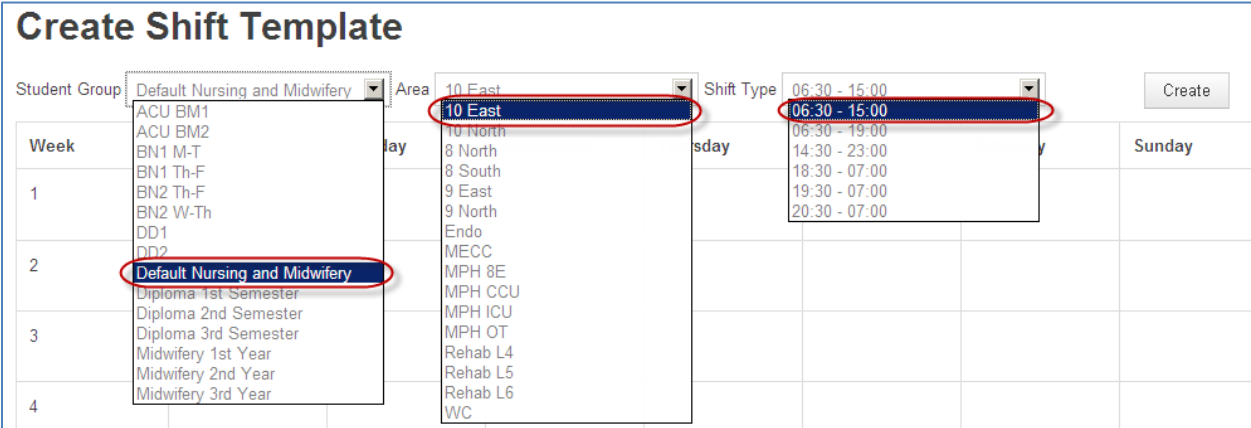


DRef-03 - Director Reference Sheet – Create and Edit Shift Templates.

Steps	Action	What it looks like																
1.	<p>In the sidebar on your Director Dashboard is the Administer Shift Templates link.</p> <p>Click on this link to navigate to the Shift Templates screen.</p>	 <p>The screenshot shows the Director dashboard with a sidebar on the left. The 'Administer Shift Templates' link is circled in red. The main content area shows summary statistics: Placement Requests (0), Capacity Variance Requests (0), and Outstanding Area Placements (32).</p>																
2.	<p>The Shift Templates screen displays the Name of each shift template, the Student Group the template applies to and who originally created the template, of any shift template that applies shifts in your Areas.</p> <p>To create a new shift template, click the Create Template button. To edit a previously created template, click its Edit button, and to delete a template, click its Delete button.</p>	 <p>The screenshot shows the 'Shift Templates' screen with a table of existing templates and a 'Create Template' button highlighted with a red arrow.</p> <table border="1" data-bbox="247 1160 1449 1384"> <thead> <tr> <th>Name</th> <th>Student Group</th> <th>Created By</th> <th></th> </tr> </thead> <tbody> <tr> <td>8 East Rotation 1</td> <td>Default Nursing and Midwifery</td> <td>Andrew Jones</td> <td><input type="button" value="Edit"/> <input type="button" value="Delete"/></td> </tr> <tr> <td>9 East Rotation 1</td> <td>Default Nursing and Midwifery</td> <td>Troy Forster</td> <td><input type="button" value="Edit"/> <input type="button" value="Delete"/></td> </tr> <tr> <td>9 East Rotation 2</td> <td>Default Nursing and Midwifery</td> <td>Spot Director</td> <td><input type="button" value="Edit"/> <input type="button" value="Delete"/></td> </tr> </tbody> </table>	Name	Student Group	Created By		8 East Rotation 1	Default Nursing and Midwifery	Andrew Jones	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	9 East Rotation 1	Default Nursing and Midwifery	Troy Forster	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	9 East Rotation 2	Default Nursing and Midwifery	Spot Director	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Name	Student Group	Created By																
8 East Rotation 1	Default Nursing and Midwifery	Andrew Jones	<input type="button" value="Edit"/> <input type="button" value="Delete"/>															
9 East Rotation 1	Default Nursing and Midwifery	Troy Forster	<input type="button" value="Edit"/> <input type="button" value="Delete"/>															
9 East Rotation 2	Default Nursing and Midwifery	Spot Director	<input type="button" value="Edit"/> <input type="button" value="Delete"/>															
3.	<p>Firstly, select the Student Group for which you are creating the shift template in the first drop down list.</p> <p>Then select the Area of the first shift is to be worked on the template from the second drop down list.</p> <p>Then select the Shift Type of the first shift to be worked on the template from the third drop down list.</p>	 <p>The screenshot shows the 'Create Shift Template' form. Three dropdown menus are highlighted with red circles: 'Student Group' (Default Nursing and Midwifery), 'Area' (10 East), and 'Shift Type' (06:30 - 15:00).</p>																



4. The shift template is laid out with weeks as the rows and days of the week as the columns, with each cell able to have 1 shift applied.

To add a shift to the template, click in your selected cell. The **Area** and **Shift Type** chosen will be displayed, along with a colour bar and a delete (✘) button.

In the below example, students will attend a shift at 0630-1500 in 10 East on Tuesday in Week 1.

Create Shift Template

Student Group: Default Nursing and Midwifery | Area: 10 East | Shift Type: 06:30 - 15:00

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		10 East 06:30 - 15:00 ✘				
2						

5. Continue adding the same shift to any other days and weeks that the students will work it. In the below example, students will work the 0630-1500 shift in 10 East nine times over 4 weeks.

Create Shift Template

Student Group: Default Nursing and Midwifery | Area: 10 East | Shift Type: 06:30 - 15:00 Create

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1		10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘			
2							
3	10 East 06:30 - 15:00 ✘			10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘	
4						10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘

5. To add a second **Shift Type**, select a different shift in the drop down box and click on the cells desired. The new shift type will have a different coloured bar so you can more easily distinguish the different shifts.

Create Shift Template

Student Group: Default Nursing and Midwifery | Area: 10 East | Shift Type: 14:30 - 23:00 Create

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1		10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘	10 East 14:30 - 23:00 ✘	10 East 14:30 - 23:00 ✘	
2	10 East 14:30 - 23:00 ✘	10 East 14:30 - 23:00 ✘	10 East 14:30 - 23:00 ✘				
3	10 East 06:30 - 15:00 ✘			10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘	10 East 06:30 - 15:00 ✘	10 East 14:30 - 23:00 ✘



6. You can also add shifts in a multiple **Areas** to the template for roster that rotate regularly between areas by selecting a new **Area** and **Shift Type** and clicking on the cells desired.

Create Shift Template

Student Group: Default Nursing and Midwifery | Area: **MECC** | Shift Type: 06:45 - 19:15 | Create

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1		10 East 06:30 - 15:00 ✕	10 East 06:30 - 15:00 ✕	10 East 06:30 - 15:00 ✕	10 East 14:30 - 23:00 ✕	10 East 14:30 - 23:00 ✕	
2	10 East 14:30 - 23:00 ✕	10 East 14:30 - 23:00 ✕	10 East 14:30 - 23:00 ✕	MECC 06:45 - 19:15 ✕	MECC 06:45 - 19:15 ✕		
3	10 East 06:30 - 15:00 ✕			10 East 06:30 - 15:00 ✕	10 East 06:30 - 15:00 ✕	10 East 06:30 - 15:00 ✕	10 East 14:30 - 23:00 ✕

7. Once you have completed entering shifts, click the **Create** button (or **Update** button if editing an already created template), type in a Name for the template and click on the **Save** button.

Create Shift Template

Student Group: Default Nursing and Midwifery | Area: 10 East | Shift Type: Name: 10 East Rotation 1 | Save | **Create**

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1		10 East 06:30 - 15:00 ✕	10 East 06:30 - 15:00 ✕	10 East 06:30 - 15:00 ✕	10 East 14:30 - 23:00 ✕	10 East 14:30 - 23:00 ✕	
2	10 East 14:30 - 23:00 ✕	10 East 14:30 - 23:00 ✕	10 East 14:30 - 23:00 ✕	10 East 19:30 - 07:00 ✕	10 East 19:30 - 07:00 ✕		
3	10 East 06:30 - 15:00 ✕			10 East 06:30 - 15:00 ✕	10 East 06:30 - 15:00 ✕	10 East 06:30 - 15:00 ✕	10 East 14:30 - 23:00 ✕

8. **Troubleshooting 1: Student Group is not displaying in the drop down list**

If a *Student Group* is not displayed in the drop down list this will be because either the *Student Group*:

- has not been created **and/or**
- has not been assigned to any Shifts in any of your *Areas*.

Contact your System Administrator to rectify, or if you have Administrator access, refer to [ARef-10 - How to Administer Areas](#) and [ARef-05 - How to Administer Disciplines](#)

9. **Troubleshooting 2: Area not in the drop down list**

If an *Area* is not displayed in the drop down list, this will be because the *Area* either:

- has not been created **and/or**
- has not been allocated to your user profile **and/or**
- has not got any shifts that have been assigned the *Student Group* chosen in the first drop down list.

Contact your System Administrator to rectify or, if you have Administrator access, refer to [ARef-10 - How to Administer Areas](#), [ARef-09 - How to Add and Disable Locations and Areas](#) and [ARef-02 - How to Administer Users](#)

10. **Troubleshooting 3: Shift Type not in the drop down list**

If a *Shift Type* is not displayed in the drop down list, this will be because the *Shift Type* either:

- has not been created in the chosen *Area* **and/or**
- has not been allocated to the chosen *Student Group*.

Contact your System Administrator to add it or, if you have Administrator access, refer to [ARef-10 - How to Administer Areas](#).