PRESETS – HOW TO CREATE, USE AND DELETE

What are the benefits to creating and using a Preset?

If you use filters to view the schedule, create a Preset that includes your selected filters. You will be able to select the preset from the schedule selection page and the schedule will load with your selected filters.

If you navigate away for the ASV, you can return to your preset schedule by selecting Scheduling from the blue bar and then View Schedule. The schedule loads with filters and other parameters of the preset last loaded.

CREATING A PRESET BASED ON THE CURRENT WEEK:

Load the schedule for teams to view, then using the Schedule Period selection of Current Week, select Load. Select the filters for the schedule, then expand the Schedule Selection area by selecting the expand icon (up arrow) located above the function tools, right side of screen – *the Schedule Selection area displays*

1. Select Save as Preset, located after the Load button on the left side of page - *the Preset Definition window displays*
2. Name the preset with a unique identifying name, if you have more than one team, include the team's name -*only you will see your presets*
3. Select the checkboxes for Filters and Sorts & Exclude OFF Shifts, DO NOT select Include Sub Teams
    a. Schedule Period – If you loaded the schedule with the Current Week selected, then the radio button will be selected, and Current Week is listed for the Schedule Period.
    b. You can use the dropdown to change the selection.
4. Select Save.

CREATING A PRESET FOR MANUAL DATES

Follow the directions above, including steps 1 & 2
3. Select the checkboxes for Filters and Sorts & Exclude OFF Shifts, DO NOT select Include Sub Teams
4. Schedule selection and Dates – Select the radio button in this section
    a. On the first row type 0 (zero) for the Days, if current date is the desired as the start date, then select Before for the Current Date
    b. On the next row enter the number of days after the current date, let us say 2 for the Days, then select After the Current Date –*In this example when the preset is selected it will display the schedule for three days, the current date, and the following two days*
5. Select Save

EXAMPLES OF OTHER DATE SELECTIONS: To view yesterday, today & tomorrow you will select 1 day before the current date and 1 day after the current date. To view today and the next 4 days you will select 0 days before and 4 days after.

LOADING A SCHEDULE USING A PRESET:

1. Select Scheduling from the blue navigation bar, then select Advanced Schedule View
2. Select the lookup icon in the Preset section and select the preset from the list – instead of using the lookup you can choose to type a few letters of the preset name in the field, then press the tab key

The schedule will load with the filters and dates set for the preset selected – you will not have to select Load.

If you navigate away from the ASV you can return to the schedule displaying with the filters and parameters of the preset previously loaded by selecting Scheduling from the blue navigation bar, and then select View Schedule.
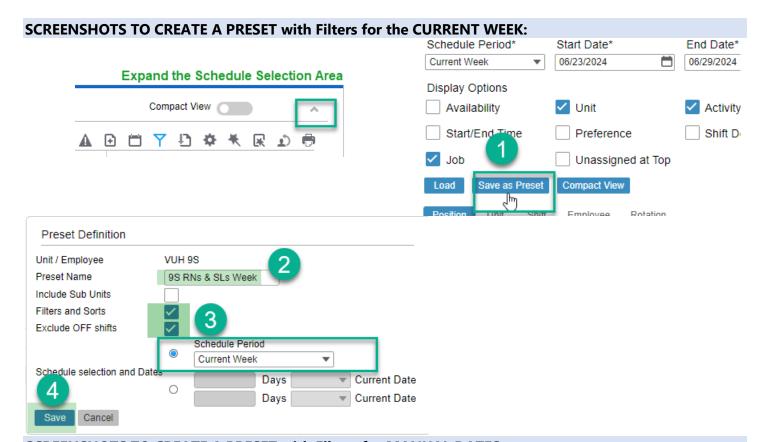
DELETING A PRESET:

1. Select Scheduling from the blue navigation bar, then select ASV Preset
2. Select edit by the preset to be deleted
3. Select the box in the Del (delete) column
4. Select Save

SCREENSHOTS TO CREATE A PRESET with Filters for the CURRENT WEEK:

SCREENSHOTS TO CREATE A PRESET with Filters for MANUAL DATES:

Steps 1 & 2 in screenshots above, then 3, 4, & 5 below