

SOP 50 | Scheduling

Build copy or bulk edit shifts

Review a multi-shift change before applying the batch.

For Web · Administrator / Supervisor

Before you start Verify the selected properties, dates and eligible workers. A batch is limited to 100 operations.

Open Schedule > Property schedule > Portfolio schedule

Step 1 Open the batch tools

Open Property schedule from Schedule, then expand Build shifts across properties to use the Bulk schedule composer.

Step 2 Build or reuse the draft

Choose properties, service dates and eligible employees per property. Set Starts locally, Ends locally, notes and reason. Optionally load a device template or use Copy previous week, then inspect every copied date.

Step 3 Review and apply

Select Review batch. Read every operation and warning, then Apply reviewed batch only when the full batch is correct.

Step 4 Bulk edit existing shifts

Select eligible shifts in the portfolio schedule. In Bulk shift action choose Move or reassign or Cancel selected shifts. Set the change and required reason, then Review selected changes and Apply reviewed batch.

Step 5 Verify the result

Inspect the saved shifts and pending acceptance. Save device template stores a reusable draft on this browser; it is not a published schedule or shared server template.

Check your result The reviewed batch is applied together and the calendar shows the intended dated shifts.

If something goes wrong Clear selections and refresh if a shift has changed or started. Access/training restrictions still apply even when overlap warnings are advisory.

See the picture reference on the next page.

SOP 50 Picture reference

Build copy or bulk edit shifts

DRAFT → PREVIEW → ATOMIC PUBLISH

Bulk schedule composer

Up to 100 operations

1. PROPERTIES

☐ Lakeside Commons Showcase

☐ Oak Terrace Showcase

☐ Synthetic North Property

☐ Synthetic South Property

2. SERVICE DATES

☐ Thu, Oct 1

☐ Fri, Oct 2

☐ Sat, Oct 3

☐ Sun, Oct 4

☐ Mon, Oct 5

☐ Tue, Oct 6

Starts locally

08:00 PM

Ends locally

11:00 PM

Route notes

Required batch reason

Template name

Save device template

Load a template

Copy previous week

Review batch

Select properties, dates, and eligible employees, then review. Overlaps are advisory; access and training are required. Saving records any overlap warnings in the audit history.

Step 2 · Choose properties, dates and employees, then review the complete batch.

Application screenshot with training data.

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