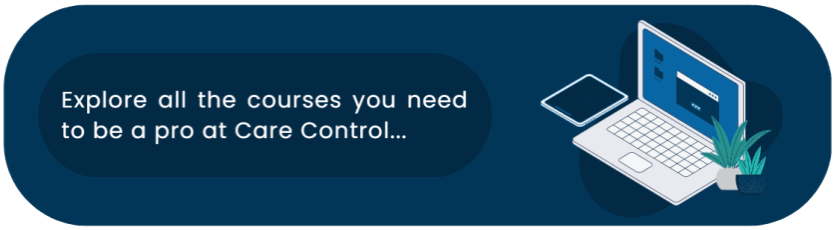
Processing a Rota Template

Roster Windows · https://cclearninghub.co.uk/docs/processing-a-rota-template/



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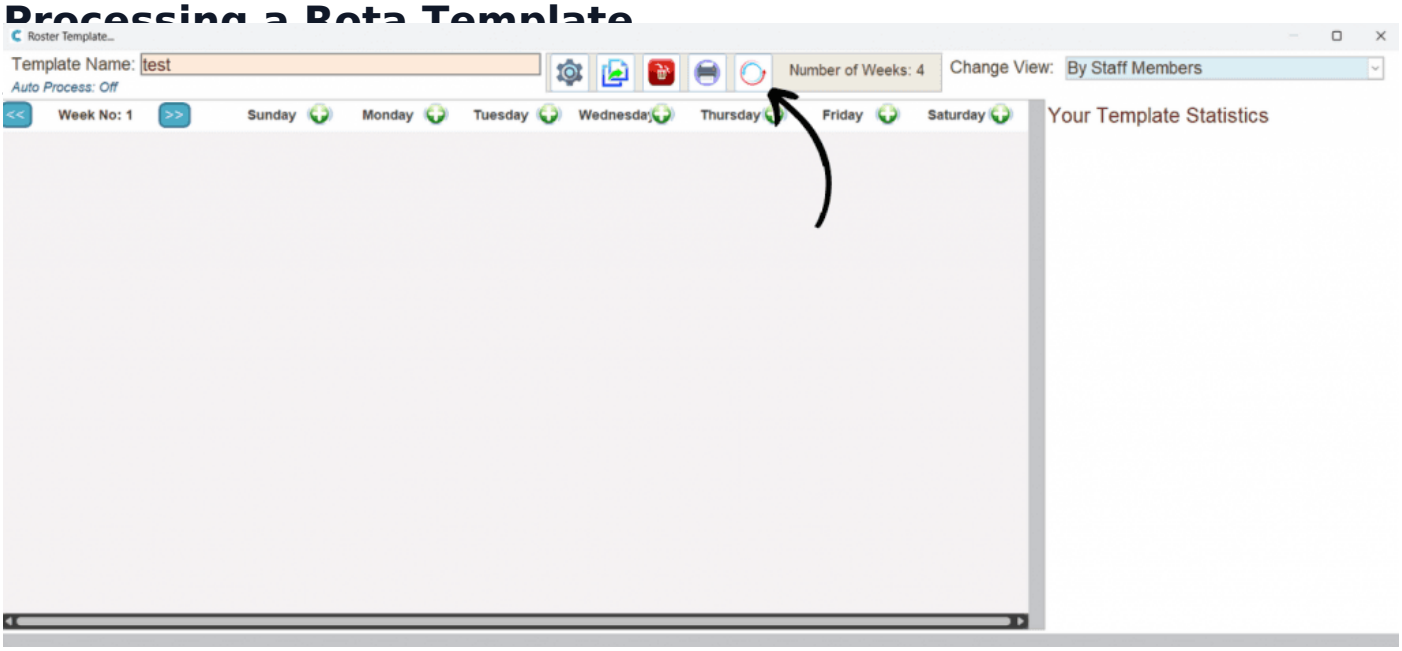
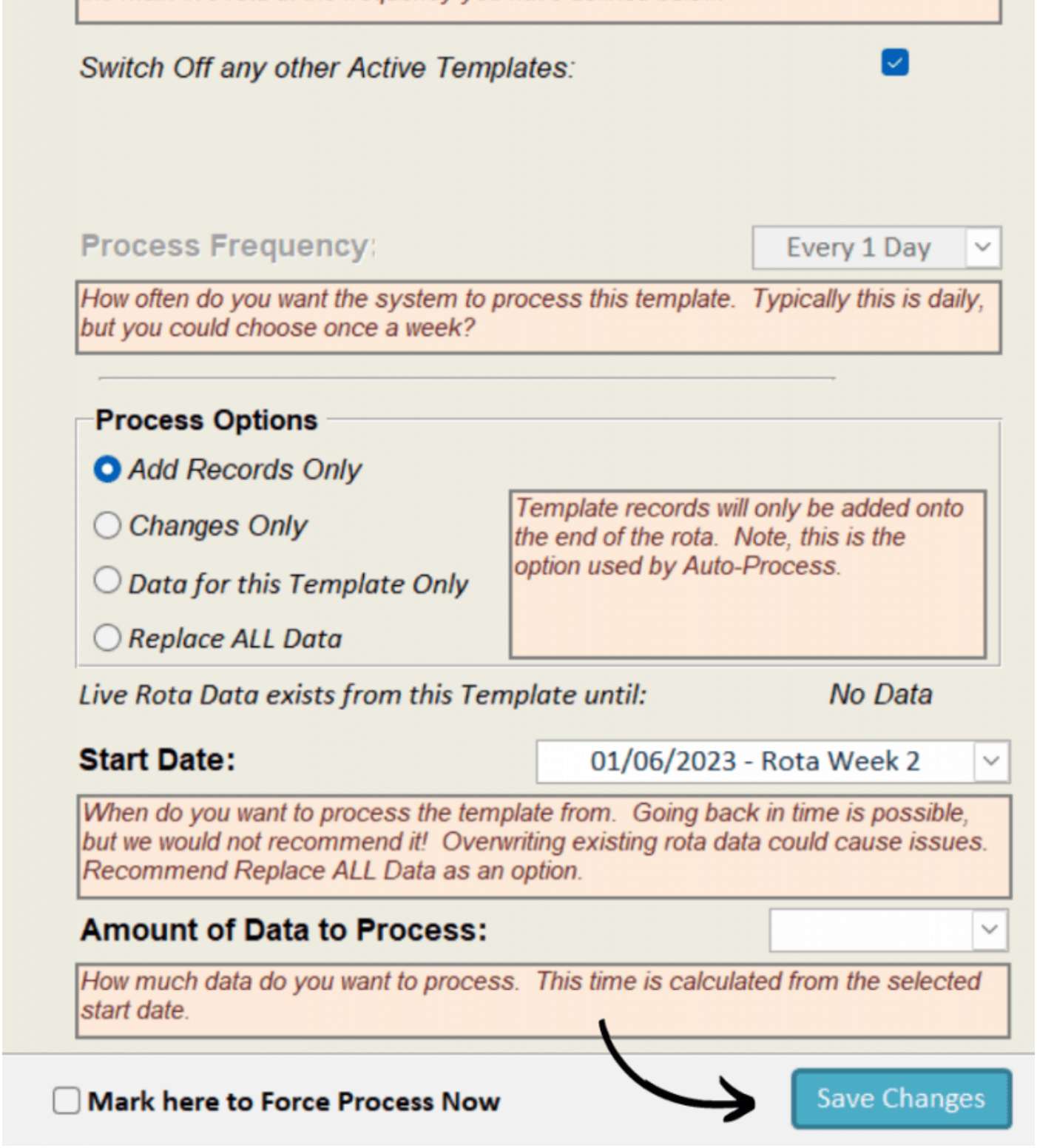


1

After opening the template you wish to process, press the symbol with 2 arrows at the top of the window.

2

The processing window contains options for how the template will overwrite an existing template amongst other options, which are explained below:



Switch to Active Template:

When this is set as *Yes,* the template will automatically process as often as defined in the Process

Frequency.
When this is set as *No*, the template will only process the amount of data defined for ‘Amount of Data to Process’, after that number of weeks has passed the Rota will be blank.

Process Frequency: For example, if the frequency is set to *Every 1 Day,* then every 1 day which passes the template will be added to the live Rota, onwards of the amount of data which has been processed already.

Add Records Only:
The records on the template will be added onto the end of the Rota, so it if you have added shifts into the template, it will not insert them when choosing this option.
The records will start adding onto the end of the Rota from the Start Date selected, so if you process 12 weeks of data and select a start date of 01/01/2023 then on that date the records will start to be added on to the end, until the 12 weeks have passed (each day which passes those records will be added in).

Changes Only:
If you have added in any shifts into the Rota template then this option will add in those entries for you.
If you already have shifts on the Rota, then any matching records from the template will be updated as long as the change is more recent to the template than the Live Rota. So, if a change to the matching record is made on the Live Rota, then that will supersede the processed Rota change made beforehand, but if you make the Rota change and then process it that will override any Live Rota changes.

Example: this option is useful when you have added on extra shifts and made changes to existing shifts and would like these changes to be applied without affecting the existing holiday, absence and cover on the Live Rota.

Data for this Template Only: When selecting this option all of the data after the selected start date will be removed.
Everything for this template will be overwritten, but the other templates will remain untouched.
If you have input any holidays, absences or cover onto the Live Rota then all of this will also be overwritten.

Example: this option is useful when you want a clean slate but only for that specific Rota template. If there are several incorrect shifts, holidays absences and cover then this would be the option to use.

Replace ALL Data:

This option only becomes available when the Support Multi-Active Templates settings is switched to **No** in the **Core Roster Settings**.

Starting from the select **Start Date** all of the data from every template which has been processed will be removed completely.

Example: this option is useful when you want to completely wipe out every entry on the Live Rota. If all of the templates which have been processed to the Live Rota are incorrect, then this is a way of restarting the process from scratch.