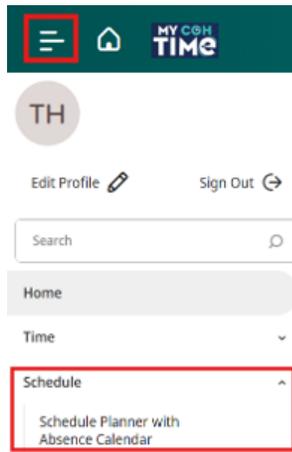


QUICK REFERENCE GUIDE: CREATING A SCHEDULE PATTERN

Schedule patterns allow you to enter a repeating pattern of shifts quickly in an organized way. You can create a schedule pattern for a single employee or multiple employees that share the same schedule.

1. Open the Schedule Planner glance from the home screen by selecting the Main Menu icon > Schedule > Schedule Planner with Absence Calendar.



2. Using the Timeframe Selector and the Locations and Hyperfind glance, choose the needed timeframe and list of employees from the drop-down menu.

View by Schedule Group ▾

📅 ▾ Current Schedule Period
👤 ▾ All Home
🔄 Loaded
2:56 PM

⚡ Quick Actions
👁 Show / Hide
≡ Gantt View
🔍 Zoom
👥 Load Groups

🔄 Refresh
📄 Save



3. Select the desired view settings by clicking the View By drop-down menu on the upper left-hand corner of the screen.

The screenshot shows the 'View By' dropdown menu on the left, which is highlighted with a red box. The menu options are: View By, Employee, Schedule Group, and Employment Terms. To the right, the main interface shows a calendar view for '10022_HPDP Airport IAH'. The calendar has a header with 'Current Schedule Period', 'Loaded', and '11:40 AM'. Below the header, there are three main sections: 'Sat 11/09 - Sat 11/09', 'Sun 11/10 - Sat 11/16', and 'Sun 11/17 - Fri 11/22'. Each section contains a grid of days with their respective dates and icons.

4. Check the box to the left of the employee's name. The number of selected employees will be displayed in the upper left-hand corner of the screen.

- To create an identical schedule pattern for multiple employees, check the box to the left of each employee's name. The number of selected employees will be displayed in the upper left-hand corner of the screen.

The first screenshot shows a list of employees with a header 'Name [1/68]' and a checkbox. The checkbox for the first employee is checked and highlighted with a red box. The second screenshot shows the same list with two employees selected, and the header now displays 'Name [2/68]'. Both checkboxes for the selected employees are highlighted with red boxes.



5. Right click on the employee's name and select Schedule Pattern.

- When one employee is selected, the details for the selected employee will be displayed.

20000498
CoH/1000/4000001/1000010051/20000498

Employee ID
[Redacted]

Primary Job
20000498

Schedule Group

Incoming Requests Count

Primary Location (Path)
CoH/1000/4000001/1000010051

Scheduled Hours

Schedule Pattern Add to Group Remove from... Add Shift Add Paycode Enter Time Off GoTo

- When multiple employees are selected, the display window will show the total number of employees who will receive an identical schedule pattern.

View by Employee ▾

Quick Action

2 Selected Employees

Schedule Pattern Add Shift Add Paycode Enter Time Off GoTo

[Two employees are selected with checkboxes]

You must remove an existing schedule pattern to prevent having multiple active schedules. See steps on page 9.



6. Name the schedule pattern and set the schedule pattern parameters.

- **Default parameters**
 - **Start Date:** Beginning of the pay period
 - **End Date:** Forever
 - **Define Pattern For:** 1 Week(s)
 - **Override Other Patterns:** Unchecked
 - **Start Pattern On:** Week 1

Schedule Pattern

Pattern Template
 Shift Template
 Comment
 Copy/Paste
 Delete

New Pattern

+ Add New Pattern

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1							

Start Date*

End Date*
 Forever
 Specify Date

Define Pattern For*
 Week(s) ▾

Override Other Patterns

Start Pattern On*
 Week



7. Right click on the first weekday of the schedule pattern and select Add Shift.

Schedule Pattern

The screenshot shows the 'Schedule Pattern' interface. At the top, there is a pattern ID '20000498' and a path '.../1000010022/20000498'. Below this, a dropdown menu shows '2024.Nov_Master' and '11/09/2024-Forever'. A 'Start Date*' field contains '11/09/2024'. A table below shows a row for 'Monday' with a 'No.' of '1'. A context menu is open over the '1' in the 'No.' column, with the 'Add Shift' option highlighted in a red box. Other options in the menu include 'Add Paycode', 'Schedule Tag', 'Paste', and 'Insert Shift Template'.

8. Enter the shift start and end time using the recommended 24-hour time format.

- Using the 24-hour time format is recommended to avoid AM and PM errors. The system will automatically update to AM or PM.

The screenshot shows the configuration for a 'Regular' shift. The rate is '[8.00]'. The 'Start Time' field is set to '6:00 AM' and the 'Start Day' is '1'. The 'End Time' field is set to '1400' and the 'End Day' is '1'. The 'Start Time' and 'End Time' fields are highlighted with a red box.



All employees must have a work rule transfer.

9. Select Transfer Employee then click on Add Work Rule. Choose the required work rule from the list of options. Use the search box to narrow the list of available work rules, then click Apply.

Regular [8.00]
Start Time Start Day
6:00 AM 1
End Time End Day
2:00 PM 1
Transfer Employee

+ Add Business Structure
+ Add Work Rule
+ Add Cost Center
+ Add Labor Category

+ Add Work Rule
COH
COH EX PUNCH
COH EX PUNCH 30
COH NE CT DAY 30
COH NE CT DAY 30 HWKA
COH NE CT DAY 60
Cancel Apply

10. Review the shift details, then hit Apply to add the finished shift to the selected weekday.

Transfer [8.00]
Start Time Start Day
6:00 AM 1
End Time End Day
2:00 PM 1
Transfer
;HPD NE OT DAY;;;
Cancel Apply

Schedule Pattern
20000498
.../1000010022/20000498
2024.Nov Master
11/09/2024-Forever
Add New Pattern
Start Date+
11/09/2024
No. 1
Sunday
6:00 AM - 2:00 PM



11. Copy and paste the finished shift to all other weekdays necessary to complete the schedule, then select Apply to load the completed schedule pattern.

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	6:00 AM - 2:00 PM	6:00 AM - 2:00 PM	6:00 AM - 2:00 PM			6:00 AM - 2:00 PM	6:00 AM - 2:00 PM

12. A success message will appear indicating the pattern was applied. Unsaved changes are identified with a border and dot in the upper right of the shift.

View by Employee ▾

1:38 PM

✔ Success Pattern changes were successfully applied.

	Sat 11/09	Sun 11/10	Mon 11/11	Tue 11/12	Wed 11/13	Thu 11/14	Fri 11/15
<input checked="" type="checkbox"/> 	6:00 AM - 2:00 PM			6:00 AM - 2:00 PM			

The schedule must be saved before it is active.



13. Hit save. A success message will appear indicating the schedule pattern has been saved.

View by Employee ▾ 📅 Current Schedule Period 👤 10022_HPD Airport IAH 🔄 Loaded 🕒 2:23 PM

⚡ Quick Actions 👁 Show / Hide ☰ Gantt View 🔍 Zoom 🔄 Refresh 💾 Save

✔ Success The schedule has been successfully saved.

	Sat 11/09 - Sat 11/09		Sun 11/10 - Sat 11/16		Sun 11/17 - Fri 11/22		
<input type="checkbox"/> Name [0/145]	Sat 11/09	Sun 11/10	Mon 11/11	Tue 11/12	Wed 11/13	Thu 11/14	Fri 11/15
<input type="checkbox"/> Temporarily Unavailable	6:00 AM - 2:00 PM	6:00 AM - 2:00 PM	6:00 AM - 2:00 PM	6:00 AM - 2:00 PM			6:00 AM - 2:00 PM



REMOVING AN EXISTING SCHEDULE PATTERN

You must remove an existing schedule pattern to prevent having multiple active schedules that could create inaccurate attendance records and a potential overpayment of hours.

- Schedule patterns that have already been worked must have an end date applied and cannot be deleted.
- You can edit a schedule pattern with a modified date of the next day which will end the current pattern as of that date and start the new pattern as of that date. The date must be after the last signoff date.
- Overwriting a schedule pattern will remove the current pattern and replace it with the edited one from the last signed off date. **WARNING: You may be deleting past worked shifts.**

<input checked="" type="checkbox"/> Name [1/1]	Sat	Sun	Mon
<input checked="" type="checkbox"/> [Redacted Name]	7:00 AM - 3:00 PM 10:00 PM - 6:00 AM 11:00 PM - 7:00 AM 11:00 PM - 7:00 AM 11:00 PM - 7:00 AM	7:00 AM - 3:00 PM 10:00 PM - 6:00 AM 11:00 PM - 7:00 AM 11:00 PM - 7:00 AM 11:00 PM - 7:00 AM	7:00 AM - 3:00 PM 10:00 PM - 6:00 AM 11:00 PM - 7:00 AM 11:00 PM - 7:00 AM 11:00 PM - 7:00 AM

1. Follow steps 1-4 provided on pages 1 and 2.



2. Select the schedule pattern that is no longer needed and click the blue down arrow to display the list of options.

The screenshot shows the 'Schedule Pattern' management interface. At the top, there are icons for information, Pattern Template, Shift Template, Comment, Copy/Paste, and Delete. Below this is a list of schedule patterns. The first pattern is 'New Pattern 8/31/2024-Forever'. The second is 'New Pattern 11/23/2024-Forever'. The third is '11/23/24 11/23/2024-Forever'. The fourth is 'New Pattern 11/23/2024-Forever', which is highlighted with a red box around its dropdown arrow. A context menu is open over this pattern, showing options: Edit (with a pencil icon), Rename (with a circular arrow icon), and Delete (with a minus icon). To the right of the list is a '+ Add New Pattern' button. Below the list, there are fields for 'Start Date*' (11/23/2024), 'End Date*' (Forever selected, Specify Date unselected), 'Define Pattern For*' (1 Week(s)), and 'Start Pattern On*' (Week 1). A table below shows a shift for 'Monday' from '7:00 AM - 3:00 PM'.

3. To edit a schedule pattern, select Edit.

This is a close-up of the context menu for the 'New Pattern 11/23/2024-Forever' item. The 'Edit' option, represented by a pencil icon, is highlighted with a red rectangular box. The other options are 'Rename' (circular arrow icon) and 'Delete' (minus icon).



4. Choose to either Modify or Overwrite the schedule pattern, then click apply. The end date will be displayed in the schedule pattern title.
 - The Modify as of Date will default to the next calendar day. Use the calendar icon to select a different effective date.

Edit Pattern X

Modify As Of Date 

This will end the current pattern as of this date and start the new pattern as of this date.
The date must be after the last signoff date.

Sample: 

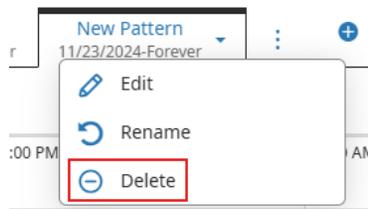
Overwrite Pattern

This will remove the current pattern and replace it with the edited one from the last signed off date. **WARNING:** You may be deleting past worked shifts.

Sample: 

5. Modify the schedule as needed following steps 6-12.
6. To delete a schedule pattern, select Delete. The end date will default to the current calendar day.

- Use the calendar icon to select a different effective date. The end date will be displayed in the schedule pattern title.



New Pattern
11/23/2024-Forever

- Edit
- Rename
- Delete**

Warning X

The pattern cannot be deleted because it has already been worked.

Would you like to end date it as of:



