Creating Schedule Patterns

Schedule Patterns are predefined, repeating schedules that define when employees are scheduled to work. Examples of Schedule Patterns are “9 AM-6 PM (M-F)” or “11 AM-7 PM (Sa-Su).” Schedule Patterns are assigned to employees – both salaried and hourly. Schedule Patterns assigned to salaried employees can create auto punches if Time and Attendance is set up to do so; Schedule Patterns assigned to hourly employees create schedules that Supervisors can then use to compare to an employee’s actual work time to monitor attendance and address any issues that arise.

Generally, Schedule Patterns are defined and schedules are created at implementation. However, when you add a shift, hire seasonal workers, or have employees who work regular schedules that have not been created in the system, follow the steps below to create a new Schedule Pattern.

- Step 1: Create a name for the Schedule Pattern.
- Step 2: Define the reference date, or beginning date for the Schedule Pattern cycle and the number of schedules that should be created initially and that each employee record should always have.
- Step 3: Define the active dates for the Schedule Pattern.
- Step 4: Choose a start date for the Schedule Pattern.
- Step 5: Assign times to each day of the week the schedule includes.
  For example, if a Schedule Pattern includes Monday through Friday, enter times for each of the five days.

Detailed instructions and screen shots for each step begin on the next page.
Step 1: Name the Schedule Pattern.

Follow these steps to create a name for the new Schedule Pattern:

1. Select Schedule Patterns from the Operations menu.

2. Click the Add New Schedule Pattern link at the top of the page.

3. Complete the fields according to the on-screen instructions and then click Ok.

![Image](image.png)

Figure 1. Create a new schedule pattern on the Schedule Patterns Basic Properties window.

Note: Best practice is to name the Schedule Pattern using start and end times as well as the days of the week it includes. You may also want to add special notations such as Paid Lunch or Unpaid Lunch.
Step 2: Define the active dates for the Schedule Pattern.

Follow these steps to define the dates during which the Schedule Pattern will be active. Schedules will be created for employees to whom the Schedule Pattern is assigned for the active duration you specify:

1. On the Schedule Patterns window, click the Duration Change link.
2. Make entries and selections, following the on-screen instructions and then click Ok.

Figure 2. Choose the active dates for the Schedule Pattern on the Schedule Pattern Duration Properties window.
Step 3: Define the Schedule Pattern reference date.

Follow these steps to define the first date schedules should be created for employees who are assigned this Schedule Pattern and the number of initial schedules that should be created:

1. On the Schedule Patterns window, click the Reference Change link.

2. Complete the fields according to the on-screen instructions, noting the following, and then click Ok.
   - The Reference Date must be equal to or after the active date you entered in “Step 2: Define the Active Dates for the Schedule Pattern.”
   - Check the Place Schedules on Holidays box only if employees work on holidays.

Figure 3. Choose the beginning date of the Schedule Pattern on the Schedule Pattern Reference Properties window.

Note: When a Schedule Pattern is initially created, the nightly process creates multiple schedules based on the value in the Schedules to Create field: 180 days in the example above. After initial schedule creation, nightly processing adds one new day so that each employee always has the same number of schedule days.

Only existing schedules that were created from a Schedule Pattern are updated during nightly processing. Nightly processing will not delete, replace or update:

- Schedules that have been manually modified.
- Absence Planned Schedules created when a Leave Request is approved.
Step 4: Choose a start date for the Schedule Pattern.

Follow these steps to choose a start date for the Schedule Pattern:

1. On the Schedule Patterns window, click the Advanced Change link.

2. Complete the fields according to the on-screen instructions and then click Ok.

Note: If you select “Beginning x Days from Current Date” from Apply From dropdown list, you must complete the Days field as well or schedules will not be created.

Figure 4. Choose the beginning date of the Schedule Pattern on the Schedule Pattern Reference Properties window.
Step 5: Assign times to days in the Schedule Pattern.

Follow these steps to assign times to each day of the week the Schedule Pattern includes (see Figure 5 on the next page):

1. On the Schedule Patterns window, click the Change link on the first day in the schedule pattern. For example, if the Schedule Pattern is 9 AM-6PM, M-F, then Monday is the first day so you will click the Change link for Monday.

2. Verify that Schedule this Day is selected.

3. Make the entries listed in the table below and then click Ok.

<table>
<thead>
<tr>
<th>Field</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Type</td>
<td>• Standard: for all regularly worked schedules.</td>
</tr>
<tr>
<td></td>
<td>• Flex: for flex-time schedules; no start and end times.</td>
</tr>
<tr>
<td></td>
<td>• Absence Planned: do not use; created on individual schedules when leave requests are approved.</td>
</tr>
<tr>
<td>Schedule Start Time/</td>
<td>Times employees will punch in/out. Enter military time, or times, such</td>
</tr>
<tr>
<td>Schedule End Time</td>
<td>as 9a and 6p in their respective fields and ToD will convert your</td>
</tr>
<tr>
<td></td>
<td>entries to military time.</td>
</tr>
<tr>
<td>Duration</td>
<td>The default is 8 hours. If more or fewer hours will be worked during</td>
</tr>
<tr>
<td></td>
<td>the shift – as in the case of an unpaid lunch – enter a value that</td>
</tr>
<tr>
<td></td>
<td>reflects the number of hours that will actually be worked. For example,</td>
</tr>
<tr>
<td></td>
<td>if the employees will get a 30 minute unpaid lunch during a 9a to 6p</td>
</tr>
<tr>
<td></td>
<td>shift (9 hours), type 8.5 in this field.</td>
</tr>
<tr>
<td>Schedule Style</td>
<td>Leave the default, Standard, unless your company has created different</td>
</tr>
<tr>
<td></td>
<td>schedule styles.</td>
</tr>
</tbody>
</table>

4. Repeat the steps above for each day included in the Schedule Pattern. For example if the Schedule Pattern is 9 AM-6PM, M-F, repeat the steps for the remaining days, Tuesday through Friday.
Figure 5. Assign times to each day of the week the Schedule Pattern includes.

Note: The next step is to assign Schedule Patterns to employees. Schedule Patterns can be assigned to employees and updated through either the Time and Attendance or the Payroll application. See the “Assigning or Changing a Schedule Pattern” job aid for more information. When the Schedule Pattern is assigned to an employee, they will appear on that employee’s Schedule page.