

Create a schedule pattern

Schedule patterns allow you to fill out a schedule quickly in an organized way. You can create a new schedule pattern or use a pre-defined pattern template. You can assign patterns to any employee or group of employees.

Assign a pattern template

You can create a use a pattern template for a single employee, multiple employees, a schedule group, or employees sharing the same employment terms.

1. Open the **Schedule Pattern** glance for specific employees having the same schedule pattern, by doing one of the following:
 - Double-click an employee.
 - Right-click an employee, a schedule group row, or a employment terms row, and select **Schedule Pattern**.
 - Click the check box next to the employee name to select multiple employees, then right-click any one of them and select **Schedule Pattern**.
 - Use shift-select or Ctrl-select to select multiple employees, then right-click any one of them and select **Schedule Pattern**.
 - **Note:** If the Schedule Pattern glance appears with a schedule pattern already defined, select Add New Pattern before you begin.

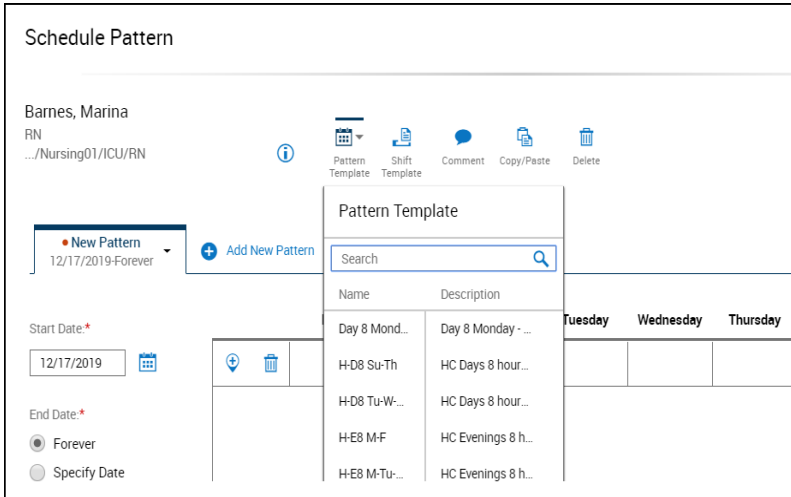
Select the pattern template

2. Click **Pattern Template** at the top of the glance, then select a template.

Note:

Search for the name of a template by typing any part of the template name in the search box.

3. Verify the **Start Date** and (optionally) an **End Date** to indicate the effective period of the pattern.
4. Select the **Override Other Patterns** check box if the pattern should overwrite any shifts and paycodes created by a previously applied schedule pattern.
5. Click **Apply**. The **Schedule Pattern** glance closes, and the pattern is applied for the loaded period.
6. On the main schedule page, click **Save**. The pattern is rolled out for its entire length.



The screenshot shows the 'Schedule Pattern' interface for 'Barnes, Marina RN'. A 'Pattern Template' dropdown menu is open, displaying a search bar and a table of templates. The table has columns for 'Name' and 'Description'. The visible templates are:

Name	Description
Day 8 Mond...	Day 8 Monday - ...
H-D8 Su-Th	HC Days 8 hour...
H-D8 Tu-W...	HC Days 8 hour...
H-E8 M-F	HC Evenings 8 h...
H-E8 M-Tu...	HC Evenings 8 h...

Below the table, there are columns for 'Tuesday', 'Wednesday', and 'Thursday'. The interface also shows a 'Start Date' field set to '12/17/2019' and an 'End Date' field with radio buttons for 'Forever' (selected) and 'Specify Date'. A '+ Add New Pattern' button is also visible.

Create a schedule pattern

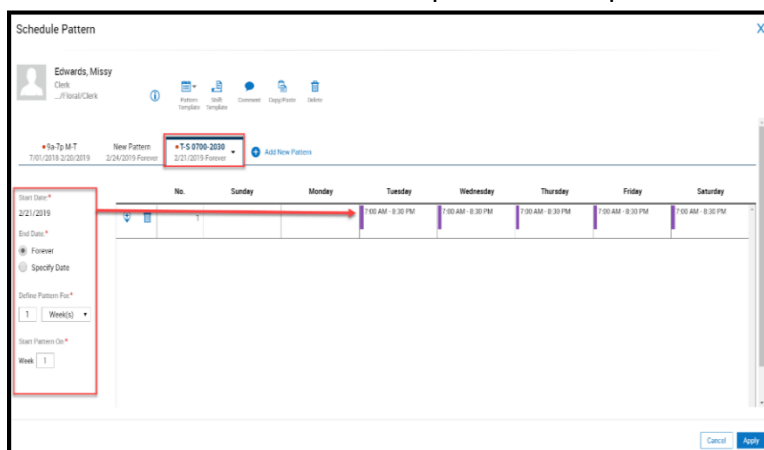
Select the employees

You can create a schedule pattern for a single employee, multiple employees, a schedule group, or employees sharing the same employment terms.

1. Open the **Schedule Pattern** glance for specific employees having the same schedule pattern, do one of the following:
 - Double-click an employee.
 - Right-click an employee, a schedule group row, or a employment terms row, and select Schedule Pattern.
 - Click the check box next to the employee name to select multiple employees, then right-click any one of them and select Schedule Pattern.
 - Use shift-select or Ctrl-select to select multiple employees, then right-click any one of them and select Schedule Pattern.
 - **Note:** If the Schedule Pattern glance appears with a schedule pattern already defined, select Add New Pattern before you begin

Define the pattern

2. Specify a **Start Date** and (optionally) an **End Date** to indicate the effective period of the pattern.
3. In the **Define Pattern For** field, specify the length of the cycle that repeats (in days or weeks).
4. Select the **Override Other Patterns** check box if the pattern should overwrite any shifts and paycodes created by a previously applied pattern. Otherwise, shifts and paycodes in the current pattern are added to those previously created.



Note:

Shifts created manually (not part of a pattern) are never overwritten by a pattern, regardless of this setting. However, you must ensure that any manually created shifts do not conflict with the pattern created shifts.

5. Create a shift for any cell using one of the following methods.
 - Right-click the cell and select Insert Shift Template, then select a template.
 - You can also select multiple cells (using shift-click or control-click), right-click one of them, click Insert Shift Template, then select a template.
 - Click Shift Template at the top of the glance, then select a template, then click the cell where you want to create the shift. You can add the same shift template simply by clicking additional cells. When you are finished creating that type of shift, click Shift Template to deactivate the quick action.

- Right-click the cell and select **Add Shift**, then define the shift parameters. You can also select multiple cells (using shift-click or control-click), right-click one of them, and click **Add Shift** to open the **Add Shift** panel. Define the shift parameters to insert the same kind of shift in each selected cell.
- You can also use the quick action **Copy-Paste** to copy a shift and paste it in a different date cell. See **Quick Actions for editing Schedule Patterns**, later in this document.

Note:

Create shifts in the cell of the day they begin. For example, a shift that begins at 11:30 pm Monday is created in the Monday cell, even though most of the shift is on Tuesday.

6. Define the availability pattern for any cell. Right-click the cell and select **Edit Availability**, then define the Availability parameters for that cell.
7. You can also select multiple cells (using shift-click or control-click), right-click one of them, and click **Edit Availability** to open the **Edit Availability** panel. Define the availability parameters to apply to all the selected cells.
8. Create a paycode for any cell. Right-click a cell or a shift and select **Add Paycode**, then define a paycode, and select **Apply**.

Note:

Leave any cell blank to represent a day that has no shift or paycode

Apply the Pattern

9. Click **Apply**. The **Schedule Pattern** glance closes, and the pattern is applied for the loaded period.
10. On the main schedule page, click **Save**. The pattern is rolled out for its entire length.

Quick Actions

You can also use the following Quick Actions to edit Schedule Patterns:

Insert Shift Template

What: Creates and assigns shifts from a shift template.

How: Select the template from the list that appears, then select a date cell, whether empty or not. Click other date cells as needed to assign the same template to them as well.

Note:

Search for the name of a template by typing any part of the template name in the search box.