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Create a schedule pattern

Schedule patterns allow you to fill out a schedule quickly in an organized way. After you have defined and saved a pattern as a Schedule template, you can assign it to any employee or group of employees.

Pattern Templates also make it possible to modify the schedule of a number of employees simultaneously by modifying the pattern assigned to them.

There are several ways to modify a pattern. You can:

- Assign a different pattern to an employee, replacing the previous pattern starting from a certain date.
- Overlay two patterns for an employee, for example, a weekend pattern and a weekday pattern.
- Temporarily replace an employee's pattern for a period of time, after which the previous pattern resumes.



Note: When you overwrite a schedule pattern for an employee who has a non-midnight **day divide** and the current pattern started prior to the employee's signed-off date, the start date of the modified pattern is set to the partially signed-off date.


To create a schedule pattern, complete the following steps.

Step 1: 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**.

To 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** .

Step 2: Define the pattern

Note: If the Schedule Pattern glance appears with a schedule pattern already defined, select **Add New Pattern**  before you begin.

Note: When creating a schedule pattern for a single employee that has multiple assignments, select the assignment for the schedule pattern from the **Assignment** list. The employee's default assignment — which is the highest ranked assignment that you have access to through your organizational set in your Employee Group and based on the selected location — is pre-selected.

1. Specify a **Start Date** and (optionally) an **End Date** to indicate the effective period of the pattern.

Note: For employees that have a non-midnight day divide, the system allows you to select the day containing the partially open period as the **Start Date**. However, no schedule entities are rolled out to the employee when those entities are contained in, or span the day divide of, their signed-off period. However, any shifts or duration **paycodes** that have a start time that occurs after the signed-off period are rolled out to the employee. Non-duration paycodes are not rolled out to the employee on a partially signed-off day.

2. In the **Define Pattern For** field, specify the length of the cycle that repeats (in days or weeks).


By default, schedule patterns have a maximum length of 52 weeks (364 days). Depending on how your system is configured, this limit may be higher. If you enter a pattern length that is greater than the limit set on your system, a message displays with the valid range.






3. 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.


4. 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. For full instructions on defining a shift, see [Add a shift](#).
- 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, below.

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.

5. Define the availability pattern for any cell. Right-click the cell and select **Edit Availability** , then define the Availability parameters for that cell.

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.. For full instructions on defining availability, see [Availability](#).

6. Create a paycode for any cell. Right-click a cell or a shift and select **Add Paycode** , then define a paycode, and select **Apply**. For full instructions on defining paycodes, see [Add a paycode](#)

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

7. Click **Apply**. The Schedule Pattern glance closes and the pattern is applied for the loaded period.

8. On the main schedule page, click **Save** . The pattern is rolled out for its entire length.

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.

If the **Adjust breaks automatically for Quick Actions and glances** setting has been selected in the Schedule Planner configuration, the system automatically adjusts the break times within the shift to comply with the adjusted shift length or

work rule transfer. Breaks are added or adjusted based on Automated Break Placement rules that are configured in employees' default work rules, such as required break length, time without a break, and coverage.

Note:

- Search for the name of a template by typing any part of the template name in the search box.
- You cannot assign templates to locked or signed-off days.

Paycode

Note: You must have the following access set to **Allowed** to ensure proper paycode edit functionality when using Quick Actions:

- **Manager - Department Manager > Scheduling > Schedule pay code edits in Full Days**
- **Manager - Department Manager > Scheduling > Schedule pay code edits in Half Days**

What: Replaces an assigned shift with a paycode. Only duration paycodes can be added to shifts when using Quick Actions.

How: Select the paycode, then click an assigned shift:

- When there is one shift on the day: The paycode replaces the entire duration of the shift.
- When there are multiple shifts on the day: The paycode uses Full Schedule Day as the Duration, so the paycode amount is the total duration of all shifts on that day. For example, if there are two 4-hour shifts on the day and you replace one of the shifts with a paycode, the resulting paycode amount is 8 hours.


The system automatically creates an open (unassigned) shift with the same start and end time as the replaced shift. If a segment tag is configured for the paycode, the segment tag is automatically added to all the segments — except for breaks — of the **open shift**. The segment tag alerts you that the open shift was created for a particular reason — such as vacation or sick leave — and needs to be filled immediately.

Click additional shifts as needed to replace them with the same paycode.

Note: You **cannot** replace an empty cell, a **shift segment**, a locked shift, or a shift during a locked or signed-off day.


Copy / Paste

What: Copies and pastes a shift, a paycode, a **schedule tag**, availability, or any combination of these items.

How: Click **Copy / Paste** , select the items you want to copy and paste, or select **All** to select all items, then click **Apply**. Click the date cell containing the items to copy, then select the date cell where you want the copied shift to appear. Repeat to paste the same items in another cell.

Delete

What: Deletes a shift, a paycode, a schedule tag, availability, or any combination of these items.

How: Click **Delete** , select the items you want to delete, or select **All** to select all items, then click **Apply**. Click the date cell containing the items to delete. Repeat to delete the same items from another cell.

Step 3: Apply the pattern

1. Click **Apply**. The pattern is rolled out for the current **schedule period**.
2. Click **Save**. The pattern is rolled out from the start to the end date.