MSS3: Personal Schedule Patterns

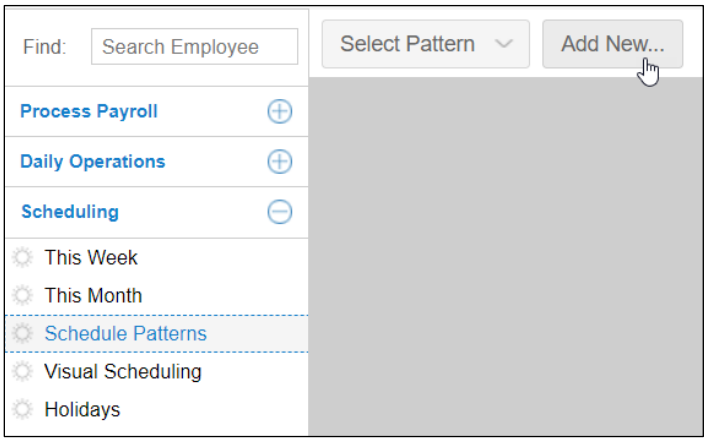
Job Aid

Personal schedule patterns can be created for employees who do not share the schedule of employees with a standard schedule pattern, but routinely work their own unique set of repetitive hours and days of the week. A framework schedule with repetitive properties can be created and have the employee assigned to it. Once assigned, you can add the specific schedule times through the employee's personal schedules page to create their unique routine schedule. Additional employees can be assigned to the framework pattern and their unique schedules defined in their individual schedule pages.

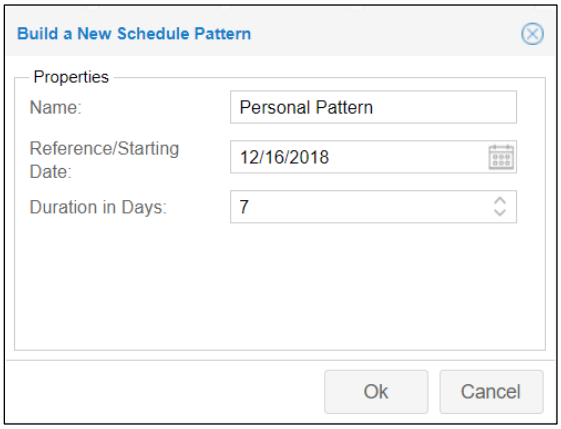
Adding a Personal Schedule Pattern

To add a personal schedule pattern:

1. Click the Schedule Patterns menu item, typically located in the Scheduling menu group.



2. Click the **Add New** button.
3. Type a name for the pattern and select the date you would like the pattern to begin on in the *Build a New Schedule Pattern* window.

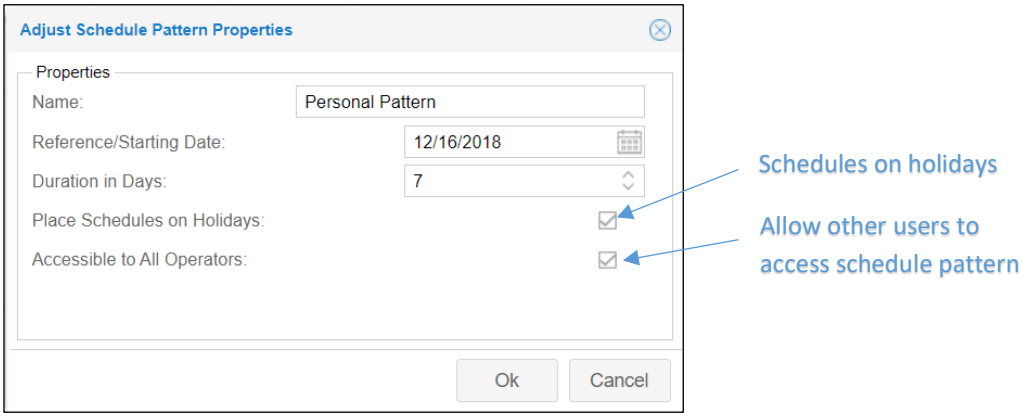


4. Select a duration for the schedule pattern. The duration is the number of days the pattern will run before it repeats, typically 7 or 14 days.

If the duration of your personal schedule pattern is 14 days or longer, set the starting date for the first day of week 1 of your pattern.

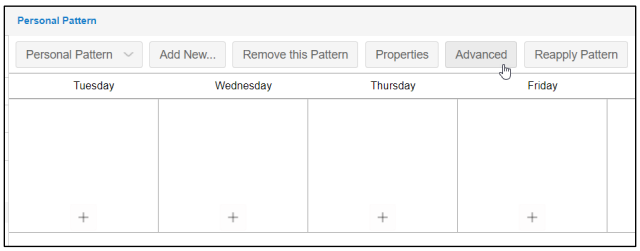
5. Click **OK**.

6. If you would like to apply the schedule on holidays, click the **Properties** button in the personal pattern page and enable the Place Schedules on Holidays checkbox in the *Adjust Schedule Pattern Properties* window.

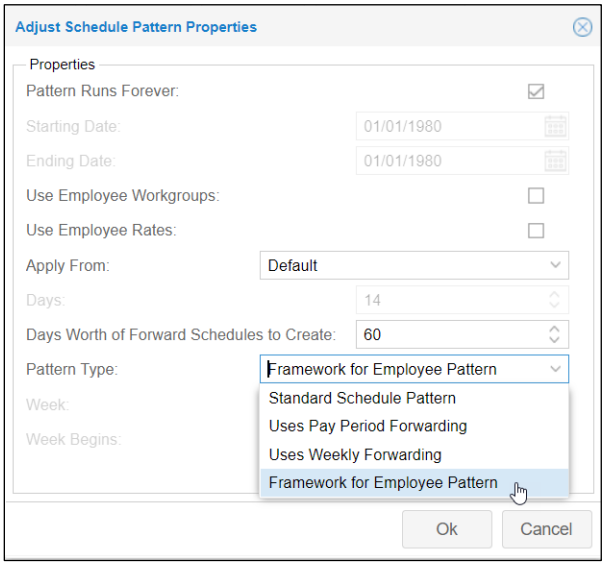


7. Enable the Accessible to All Operators checkbox if you want to allow other users to access this schedule pattern.

8. Click the **Advanced** button in the page displaying your personal schedule pattern.

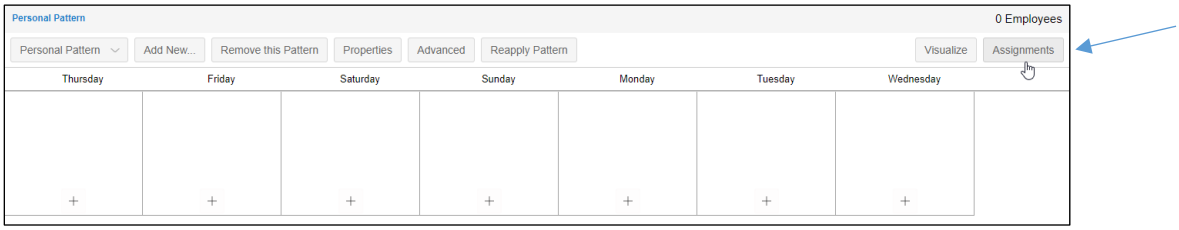


9. Select **Framework for Employee Pattern** from the Pattern Type drop-down list in the *Adjust Schedule Pattern Properties* window.

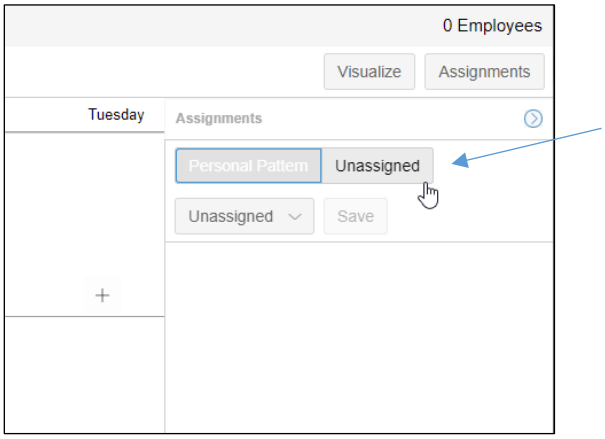


10. Click **OK**.

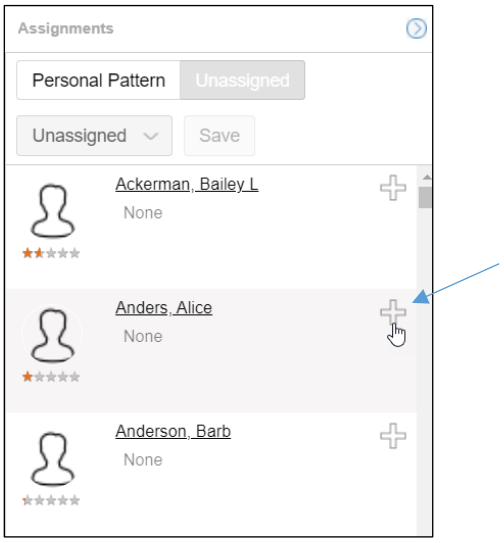
11. Click the Assignments button in the page displaying your personal schedule pattern.



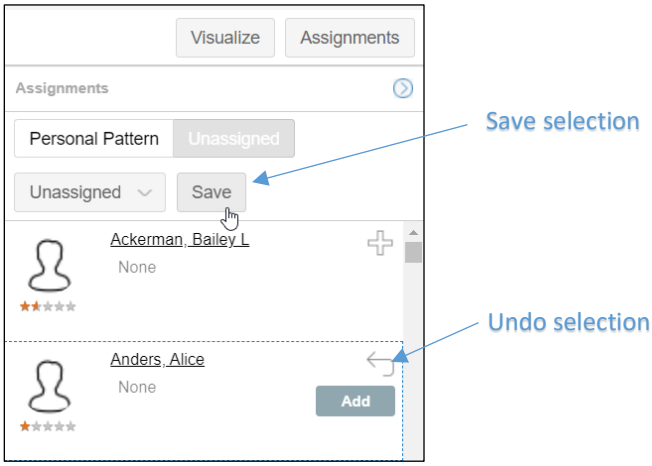
12. Click the **Unassigned** button in the Assignments panel.



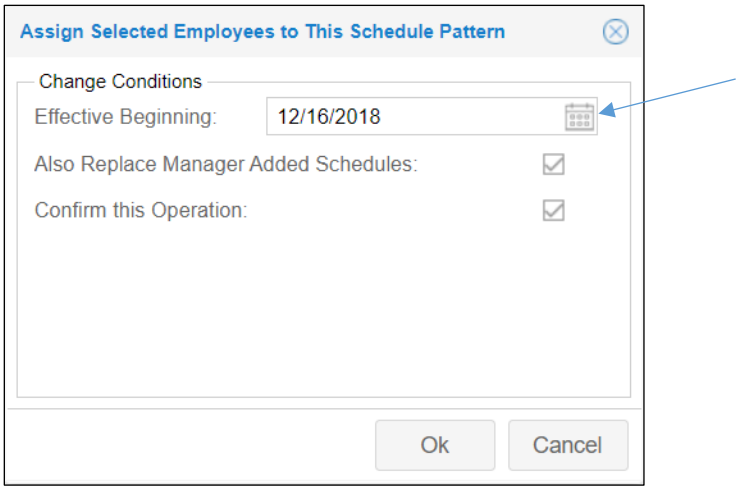
13. Locate the employee you are creating the pattern for in the Assignments panel and click the Plus icon in that employee's cell.



An Add banner will appear in the employee's cell with an arrow icon that you can click to undo your selection.

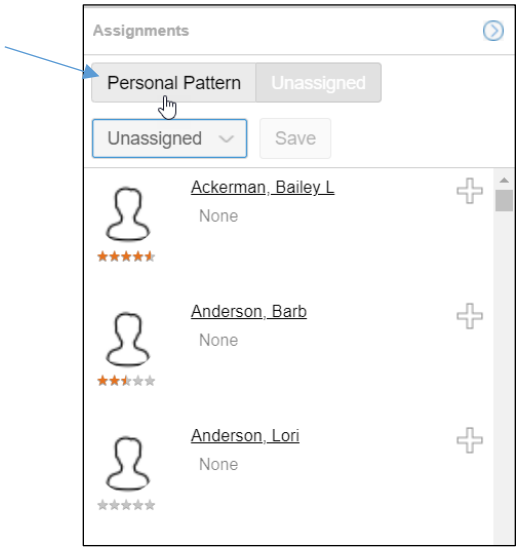


14. Click the **Save** button.
15. S Select the date you want the schedule pattern to be effective, by clicking the calendar icon. The *Effective Beginning* field contains the current date by default.

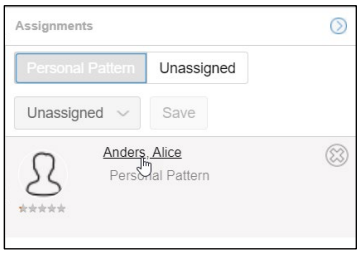


16. Enable the Also Replace Manager Added Schedules checkbox if you want to remove all schedules added by a manager, including scheduled absences.
17. Enable the Confirm this Operation checkbox.
18. Click **OK**.

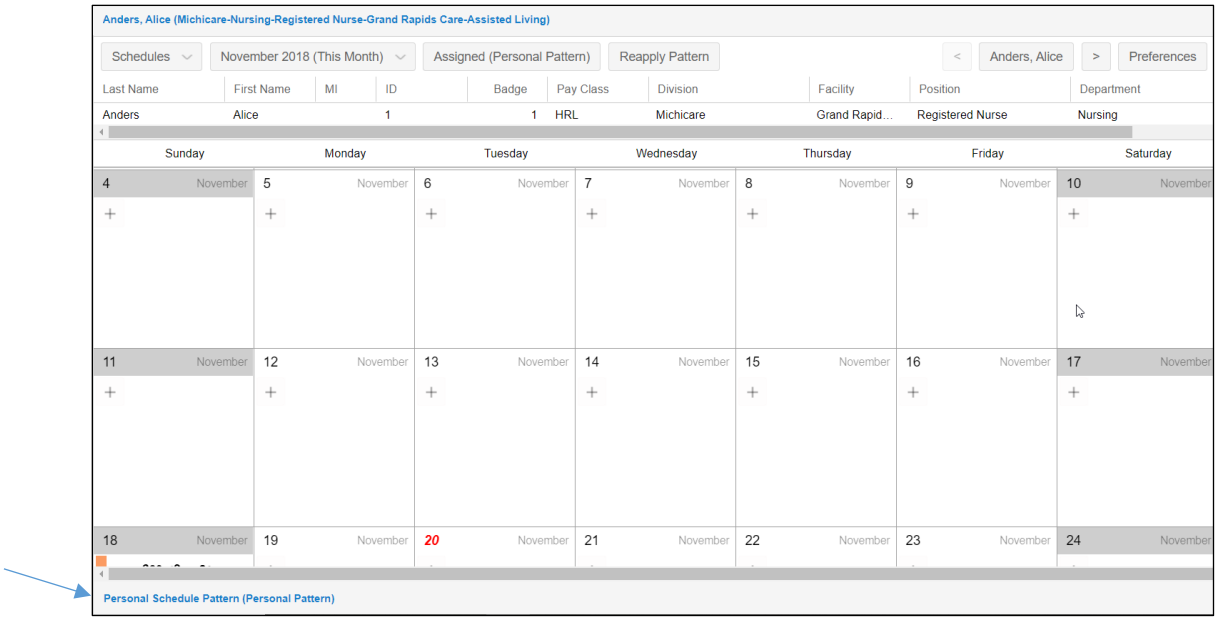
19. Click the button with the name of your personal schedule pattern (in this example the **Personal Pattern** button) in the Assignments panel.



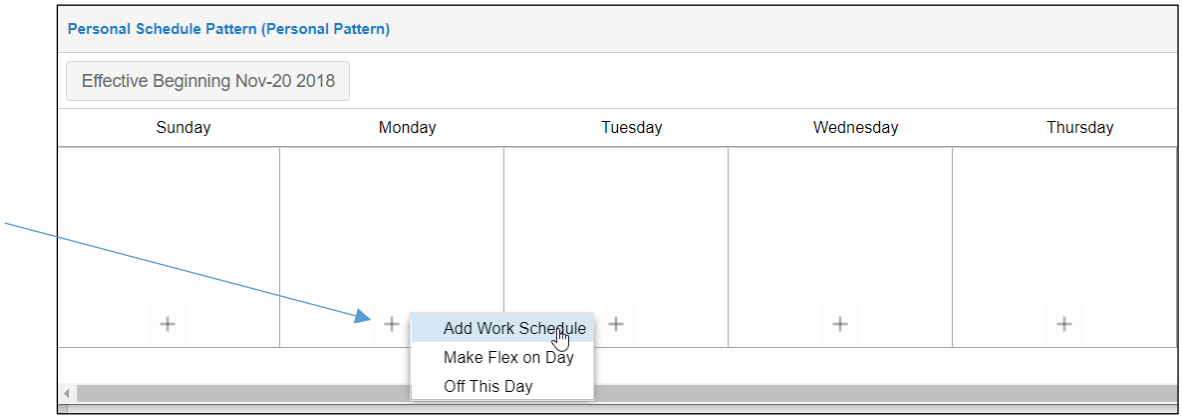
20. Click the employee you assigned to your personal schedule pattern.



The name of your personal schedule pattern will appear at the bottom of the employee's Schedules page.



21. Click the personal schedule pattern name to expand the panel.

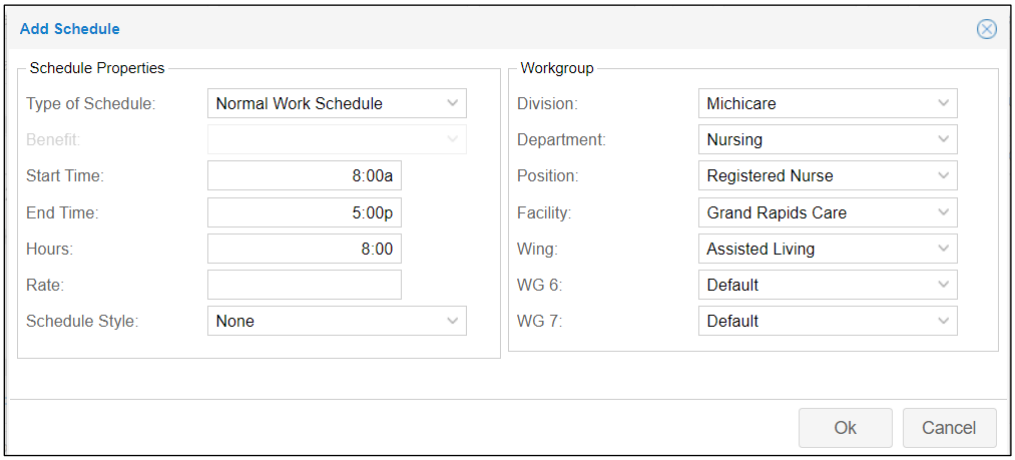


22. To add schedule times to the personal pattern, click the **Plus** icon in the schedule day cell and select **Add Work Schedule**.

There are three types of schedules you can add to a personal schedule pattern:

- Work schedule – adds a schedule with the start and end times defined
- Flex schedule – adds a schedule with only the number of hours defined
- Off This Day – adds a planned absence

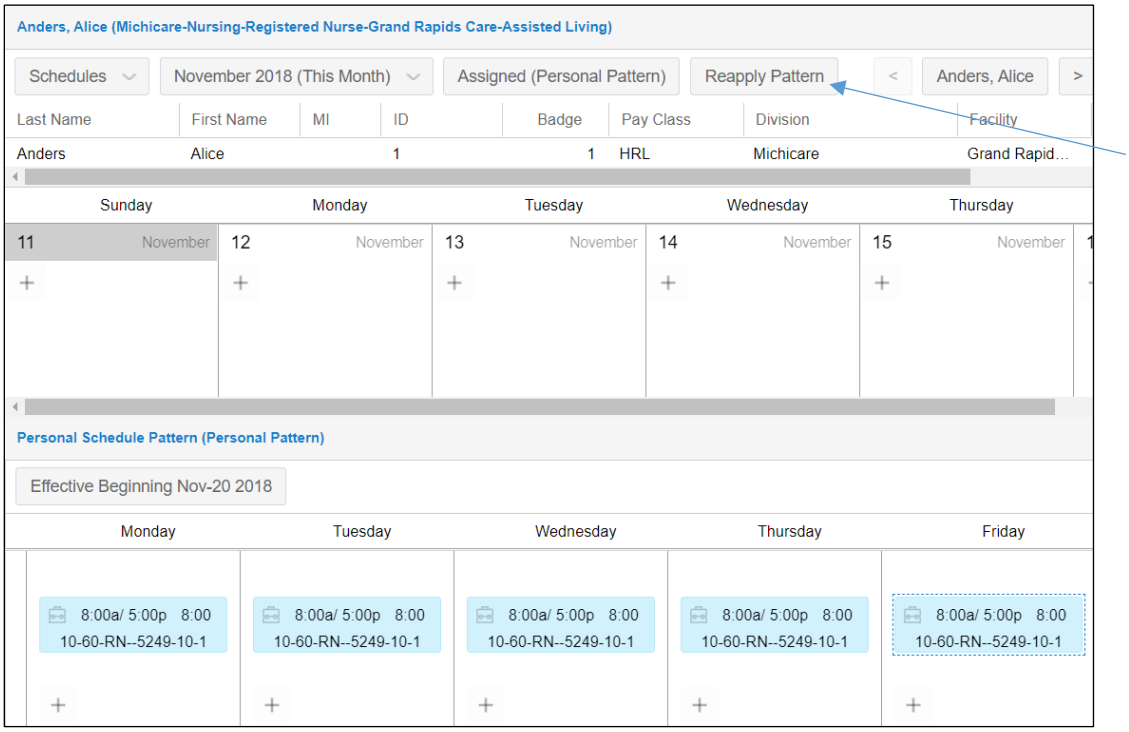
23. Add the schedule start and end times in the *Add Schedule* window.



The Workgroup selections match the employee's home workgroup assignment by default. If the employee will be working in a different workgroup for this schedule, adjust the workgroup levels to create the new assignment.

24. Click **OK**.

25. Add schedules to remaining days of the pattern.



26. Click the **Reapply Pattern** button in the employee's Schedules page to apply the pattern to the employee's schedule and overwrite previous schedules that had been added.

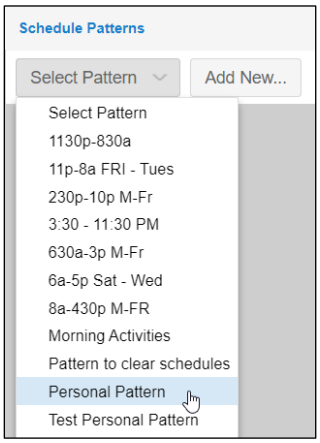
    The schedule pattern is applied based on the time frame you have selected in the schedule pattern properties.

Deleting a Schedule Pattern

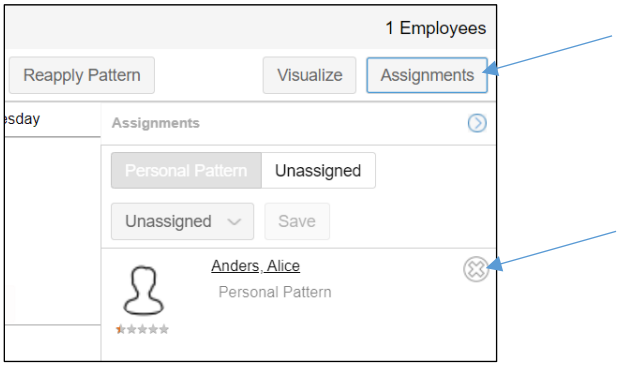
Personal schedule patterns that are no longer needed can be deleted from the list of patterns in schedule patterns page. Before you can remove a personal schedule pattern, you must first remove the employees who are assigned to the pattern.

To remove a personal schedule pattern:

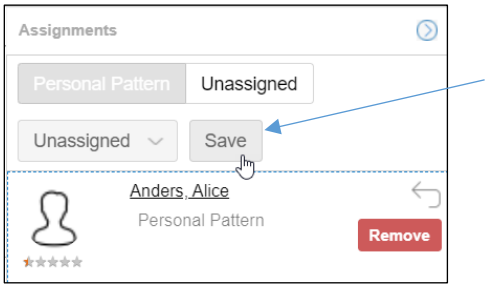
1. Select the personal schedule pattern from the Select Pattern drop-down list in the Schedule Patterns page.



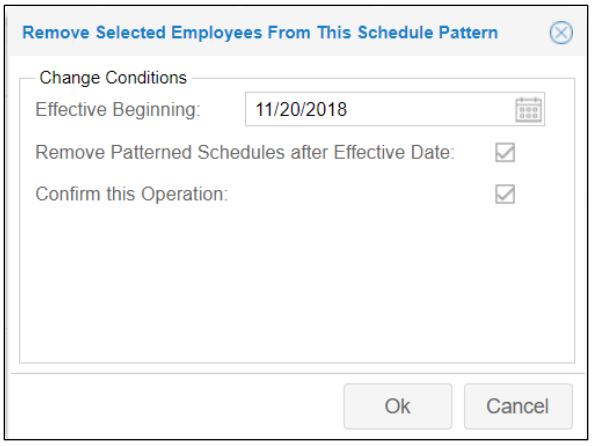
2. Click the **Assignments** button in the Personal Schedule Pattern page to expand the Assignments panel.



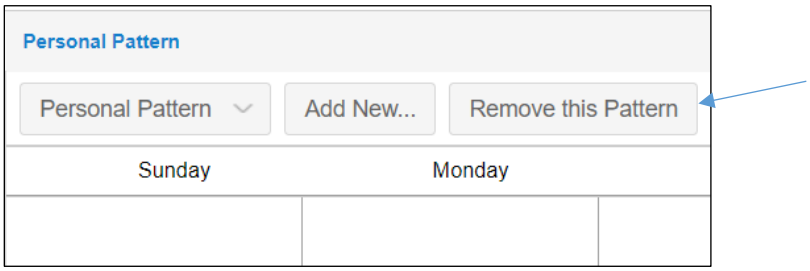
3. Click the icon in the employee cell and click the **Save** button. Repeat this for the other employees in the assignments panel if you have more than one.



4. Confirm the operation. Select a different date and enable the Remove Patterned Schedules after Effective Date checkbox to delay the removal.



5. Click the **Schedule Patterns** button at the top of the schedule pattern page to refresh the page. The Remove this Pattern button will appear in the page.
6. Click the **Remove this Pattern** button to remove your personal schedule pattern.

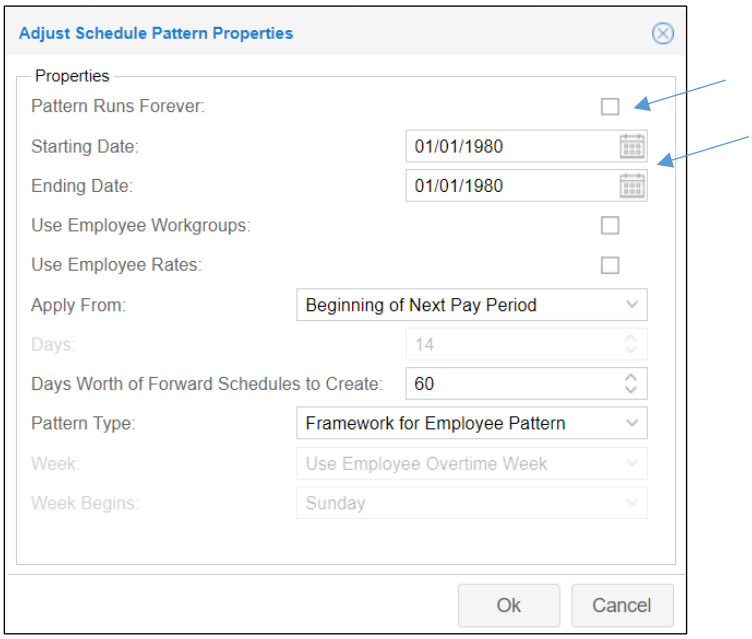


Advanced Schedule Pattern Properties

Advanced schedule pattern properties allow you to further define how and when personal schedule patterns are applied and how employee assignments to the pattern are handled.

Two options are available for determining how long the schedule pattern will be applied to an employee's schedule:

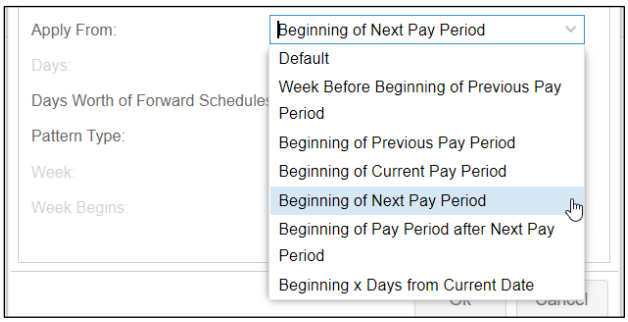
- Pattern Runs Forever – the schedule pattern repeats with no expiration date.
- Starting/Ending Dates – the schedule pattern will start and end on the dates selected.

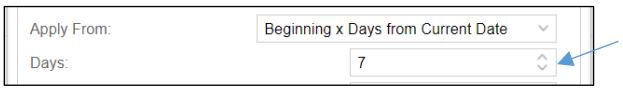


An employee's workgroup and rate can be changed in the schedule pattern properties. These changes will override the employee's current workgroup and pay rate. To make these changes, enable the following:

- Use Employee Workgroups - enable this option to override the employee's home workgroup with the workgroup defined in the schedule pattern.
- Use Employee Rates – enable this to override the employee's rate. The new rate is added in the schedule pattern properties.

When making changes to a personal schedule pattern, select a timeframe for when a changed pattern will be applied to the assigned employee's schedule. The **Default** option will apply the changed schedule on the pattern's starting date. If you select the **Beginning X Days from the Current Date** menu item, enter the number of days in *Days* field.





You can define how many days beyond the current date you want the pattern to be displayed in the employee's schedule. For example, you may want the employee to see only two weeks of schedules beyond the current week. In the *Days Worth of Forward Schedules to Create* field enter the number of days in advance of the current date you want the pattern to appear in the employee's schedule.

The final step in adding a new personal schedule pattern or making changes to a pattern is to apply the new or updated pattern to the assigned employee's schedule by clicking the **Reapply Pattern** button.

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