MSS3: Personal Schedule Patterns

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.

Find: Search Emplo	oyee	Select Pattern V Add New
Process Payroll	\oplus	Ŭ
Daily Operations	\oplus	
Scheduling	Θ	
This Week		
This Month		
Schedule Patterns		
Visual Scheduling		
Holidays		

- 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.

Build a New Schedule Pat	tern	\otimes
Properties		
Name:	Personal Pattern	
Reference/Starting Date:	12/16/2018	
Duration in Days:	7	\bigcirc
	Ok	Cancel

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.

Desertion				
Properties Name:	Personal Patte	ern		
Reference/Starting Date: Duration in Days:		12/16/2018		Schedules on holidays
Place Schedules on Holidays: Accessible to All Operators:		<u>.</u>		Allow other users to access schedule pattern
		Ok	Cancel	

- 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.

Adjust Schedule Pattern Properties			\otimes
Properties			
Pattern Runs Forever:			\checkmark
		01/01/1980	
		01/01/1980	
Use Employee Workgroups:			
Use Employee Rates:			
Apply From:	Default		\sim
		14	
Days Worth of Forward Schedules	to Create:	60	\bigcirc
Pattern Type:	Framework	or Employee Pattern	\sim
Week:	Standard Sc	hedule Pattern	
Week Begins:	Uses Pay Pe	eriod Forwarding	
		y Forwarding	
	Framework	for Employee Pattern	Ju _
		Ok	Cancel

10. Click **OK**.

- Personal Pattern 0 Employees Personal Pattern V Add New... Remove this Pattern Properties Advanced Reapply Pattern Visualize Assignments Ŀ Thursday Friday Saturday Sunday Monday Tuesday Wednesday $^+$ $^+$ + + + $^+$ +
- 11. Click the Assignments button in the page displaying your personal schedule pattern.

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

Visualize Assignments Tuesday Assignments Personal Pattern Unassigned Unassigned Save
Personal Pattern Unassigned
راس راس
T

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

Assignmen	ts	\bigcirc
Persona	Pattern Unassigned	
Unassig	ned ~ Save	
S *****	<u>Ackerman, Bailey L</u> None	4° 1
S *****	Anders, Alice None	
S *****	<u>Anderson, Barb</u> None	4

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.

Assign Selected Employe	es to This Schedule Pattern	\otimes
- Change Conditions		
Effective Beginning:	12/16/2018	800
Also Replace Manager	Added Schedules:	\checkmark
Confirm this Operation:		
	Ok	Cancel

- 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.

Schedules ~	Noven	nber 2018	3 (This Month) $$	As	signed (Personal F	Pattern)	Reapply Pattern				< Anders, Alic	e >	Preference
Last Name	First	t Name	MI ID		Badge	Pay Clas	s Division		Facility	Positi	on	Depa	rtment
Anders	Alice	ə	1		1	HRL	Michicare		Grand Rapid	Regist	tered Nurse	Nursir	ng
Sund	ay		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday
4	November	5	November	6	Noven	nber 7	November	8	November	9	November	10	Nove
+		+		+		+		+		+		+	
												2	
11	November	12	November	13	Noven	nber 14	November	15	November	16	November	17	Nov
+		+		$^+$		+		+		+		+	
18	November	19	November	20	Noven	nber 21	November	22	November	23	November	24	Nov

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.

						(
Schedule Properties			Workgroup			
Type of Schedule:	Normal Work Schedule	\sim	Division:	Michicare	\sim	
			Department:	Nursing	\sim	
Start Time:	8:00a		Position:	Registered Nurse	\sim	
End Time:	5:00p		Facility:	Grand Rapids Care	\sim	
Hours:	8:00		Wing:	Assisted Living	\sim	
Rate:			WG 6:	Default	\sim	
Schedule Style:	None	\sim	WG 7:	Default	\sim	

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.

Schedules \lor	Nove	ember 2018	3 (This Mor	nth) \sim	As	signed (Personal	Pattern)	Rea	pply Pattern	<	Anders, Alice	>
_ast Name	Fi	st Name	MI	ID		Badge	Pay Cl	ass	Division		Facility	
Anders	Ali	се		1		1	HRL		Michicare		Grand Rapid.	
Sunda	/		Monday			Tuesday		v	Vednesday		Thursday	
11 1	lovembe	12	N	ovember	13	Nover	nber 1	4	November	15	November	r
		+			+		_	-		+		
+		Ŧ			Ŧ							
		Personal Pa	ttern)		T			_				
'ersonal Schedule	ing Nov	Personal Pa	ttern) Tues	day	-	Wednesda			Thursday		Friday	
'ersonal Schedule Effective Beginr	ing Nov	Personal Pa		day	·	Wednesda			Thursday		Friday	

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 ^(S) 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.

Remove Selected Employe	es From This Schedule Par	ttern 🛞
- Change Conditions		
Effective Beginning:	11/20/2018	
Remove Patterned Sche	dules after Effective Date:	
Confirm this Operation:		
	Ok	Cancel

- 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.

Personal Pattern			
Personal Pattern \sim	Add New	Remove this Patter	m
Sunday	Ν	Monday	

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.

Ending Date: 01/01/1980 Ending Date: 01/01/1980 Jse Employee Workgroups: □ Jse Employee Rates: □ Apply From: Beginning of Next Pay Period Days: 14 Days Worth of Forward Schedules to Create: 60	
Ending Date: 01/01/1980 Use Employee Workgroups: □ Use Employee Rates: □ Apply From: Beginning of Next Pay Period Days: 14 Days Worth of Forward Schedules to Create: 60]
Use Employee Workgroups: Use Employee Rates: Apply From: Beginning of Next Pay Period Days: 14 Days Worth of Forward Schedules to Create: 60]
Use Employee Rates:]
Apply From: Beginning of Next Pay Period Days: 14 Days Worth of Forward Schedules to Create: 60]
Days: 14 Days Worth of Forward Schedules to Create: 60	
Days Worth of Forward Schedules to Create: 60	\sim
	$\hat{}$
Pattern Type: Framework for Employee Pattern	\sim
Week: Use Employee Overtime Week	
Week Begins: Sunday	

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.

Use Employee Workgroups:	
Use Employee Rates:	

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.

Apply From:	Beginning of Next Pay Period ~		
	Default		
	Week Before Beginning of Previous Pay		
ays Worth of Forward Schedules	Period		
Pattern Type:	Beginning of Previous Pay Period		
Week:	Beginning of Current Pay Period		
Week Begins:	Beginning of Next Pay Period		
5	Beginning of Pay Period after Next Pay		
	Period	Apply From:	Beginning x Days from Current Date
	Beginning x Days from Current Date	Days:	7

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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