

# **CMHC Scheduler Users Kronos Version 8 Upgrade Instructions**

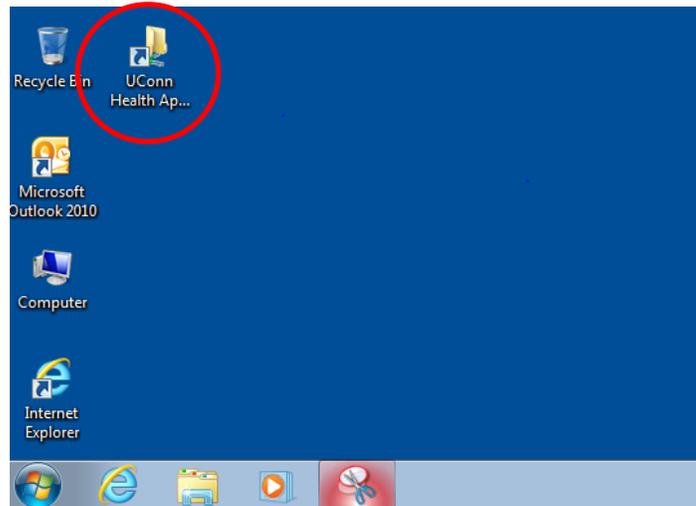
	<b>Page</b>
<b>Accessing Kronos Version 8</b>	<b>2</b>
<b>Logging On</b>	<b>3</b>
<b>CMHC Approver, Editor, &amp; Scheduler Navigation</b>	<b>4</b>
<b>Scheduler-CMHC Navigation</b>	<b>5</b>
<b>Scheduling Dept/Job Transfers and/or Work Rule Transfers</b>	<b>6</b>
<b>Managing Timecards Navigation</b>	<b>7</b>
<b>Managing Timecard Alerts</b>	<b>8</b>
<b>Salaried Employee Timecard Navigation</b>	<b>9</b>
<b>Supplemental Documentation:</b>	
• <b>Working with the Staffing Widget (Staffing-CMHC)</b>	
• <b>Entering Schedule Patterns</b>	

## ACCESSING KRONOS® TIME AND ATTENDANCE SYSTEM

In order to access the KRONOS® system, open Google Chrome (*preferred*), Internet Explorer, or Firefox and type the following URL:

<https://timereport.uchc.edu/>

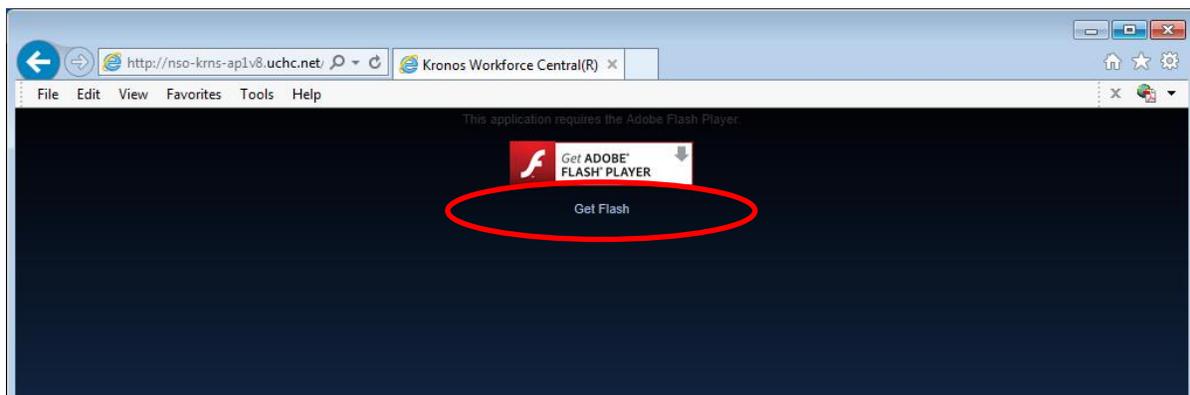
A Kronos icon is also located within the UConn Health Applications folder located on your computer's desktop.



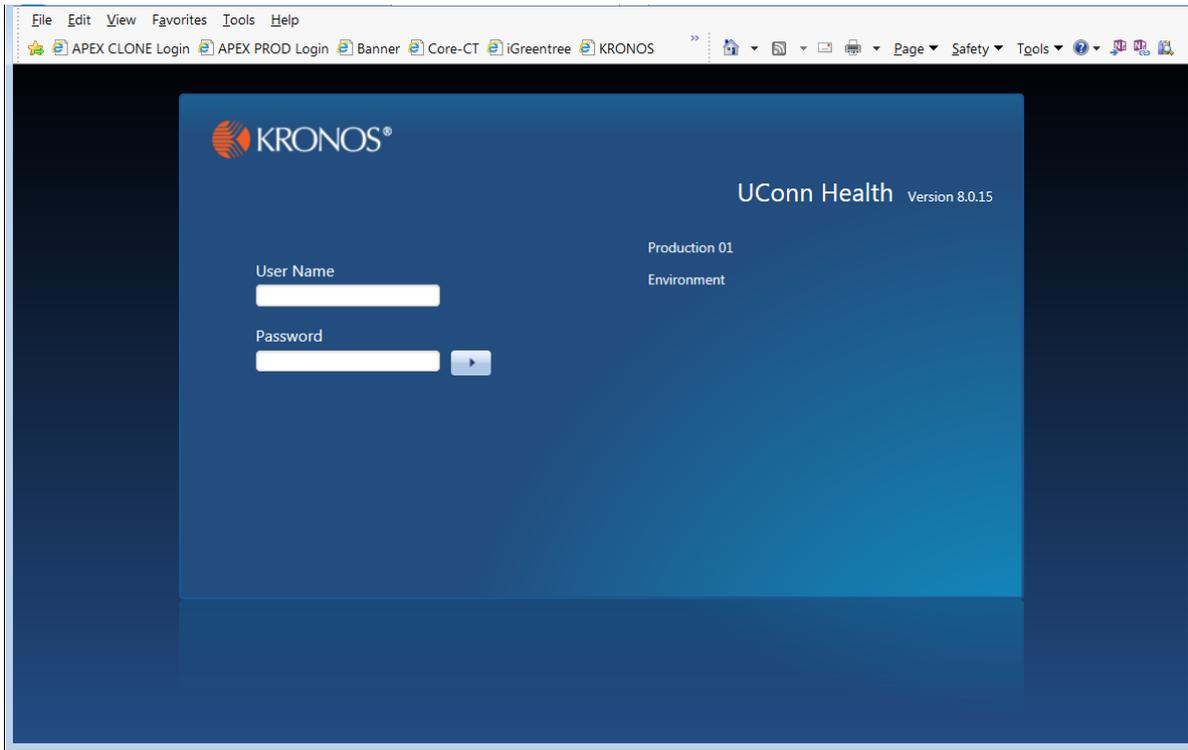
## INSTALLING ADOBE FLASH PLAYER

After entering or clicking the Kronos URL/icon, you may be prompted to **install Adobe Flash Player** (see screen below). Click on **“Get Flash”** to begin the installation. If there is no “Get Flash” prompt, proceed to the next page.

*\*\*If you are unable to install Adobe Flash and the Kronos system prohibits you from logging in after a few minutes, please call the Helpdesk at ext. 4400.*



# LOGGING ON



- Type in **Username and Password:**
- Your KRONOS username and password are the same as your UConn Health **network** username and password.
- Click **Log On** button on the right of the Password text box. 

## CMHC Approver, Editor, & Scheduler Navigation

*Note: If you are only a scheduler you may not have all the options available below*

The screenshot shows the Kronos Genies interface. Red arrows point to the following elements:

- Manage My Department tab (Home Navigation):** Points to the 'Manage My Department' tab at the top left.
- Sign Out:** Points to the 'Sign Out' button at the top center.
- Genies drop down list: My Employees, VOT, ESOS etc.:** Points to the 'My Employees' dropdown menu.
- Time Period drop down: Select time period:** Points to the 'Current Pay Period' dropdown menu.
- Calendar icon: Specify range of dates:** Points to the calendar icon in the top right.
- Select All:** Points to the 'Select All Rows' button in the toolbar.
- Find My Employees: \* wildcard:** Points to the search bar containing 'zumb\*'. Below this, a table of employee data is shown:

Name	Employee ID	Manager	Dept	Dept Name	Pay Rule	Std Pay Period Hours
ZUMBRANO1, CARLOS	TMP1	ZTest,Thomas	91802	Hartford-MED	1199C 72&80HR -8HR (3P)	0.0
ZUMBRANO11, CARLOS	TMP11	Test Super A	31010	HUMAN RESOURCES	UHP PT 8HR	40.0
ZUMBRANO13, CARLOS	TMP13	Test Super A	A	Test Dept A	VOLUNTEERS	0.0
ZUMBRANO14, CARLOS	TMP14	Test Super A	31010	HUMAN RESOURCES	FACULTY NON-EXEMPT	0.0
ZUMBRANO15, CARLOS	000015	Test Super A	A	Test Dept A	UHP FT 8HR 24X7 PH	0.0
ZUMBRANO16, CARLOS	TMP16	Test Super A	A	Test Dept A	1199 NP-6 72&80HR -8HR (3P)	0.0
ZUMBRANO17, CARLOS	TMP17	Test Super A	31010	HUMAN RESOURCES	NP-3 FULL TIME (1HR MEAN)	0.0
ZUMBRANO19, CARLOS	000019	Test Super A	31010	HUMAN RESOURCES	1199 NP-6 72&80HR -8HR (3P)	0.0
ZUMBRANO2, CARLOS	TMP2	Test Super A	31010	HUMAN RESOURCES	NP-2 75HR	0.0
ZUMBRANO3, CARLOS	TMP3	Test Super A	31010	HUMAN RESOURCES	NP-3N 24-7 MONITOR TECH	0.0
ZUMBRANO4, CARLOS	TMP4	Test Super A	31010	HUMAN RESOURCES	1199 12HR CMHC	0.0
ZUMBRANOS, CARLOS	TMP5	Test Super A	31010	HUMAN RESOURCES	UHP 9HR	0.0

- Timecard Alerts:** Points to the 'Alerts' icon in the bottom toolbar.
- Columns drop down: sort by, group by column heading:** Points to the column heading dropdown arrow.
- Go To drop down: Timecards, Schedules, Reports, Scheduler CMHC:** Points to the 'Go To' dropdown menu.
- My Timecard:** Points to the 'My Timecard' button in the Related Items bar.
- Related Items bar:** Points to the entire right-hand navigation bar.

- **Manage My Department tab** – home navigation tab to access various Genies and Related Items bar.  
*Note: when clicking Timecards, Scheduler-CMHC, Reports etc..., new tabs open to the right of the Manage My Department tab. Hover over the tab and click X to close or refresh icon.*
- **Genies drop down list** – (old My Genies tab) select the appropriate genie to view: My Employees, Employees Data, Reconcile Timecard, Pay Period Close, VOT-Use FTYD, ESOS-Use FYTD etc...
- **Go To drop down** – select employee(s) and then click Go To to go to *selected* employee(s) Timecard, Schedule(Scheduler-CMHC), People record or to run a Report on the *selected* employee(s). Selected employee(s) specific.
- **Related Items bar** – click to go to *All* your active employees (All Home) Timecards, Scheduler-CMHC (*previously named CMHC Schedule Planner*), People record or to run Reports on All Home/Group of employees.
- **Scheduler-CMHC** – (previously called CMHC Schedule Planner) click to view your employees schedules as a group and coverage counts.
- **Alerts** – click to see employees with timecard exceptions for the *current* pay period such as Missed Punch, Unexcused Absence, Very Early In, Very Late Out, Unscheduled, and Invalid Duration.
- **Columns drop down** – hover over any column heading, click the down arrow, and select sort or group by.
- **My Timecard** – Salaried Employees Only – (located on the Related Items bar on right) click to enter, edit, view, and approve your own time report. (*refer to salaried employee timecard navigation on last page*)

## Scheduler-CMHC Navigation

**Navigation Tabs Opened:** Manage My Department (home), Scheduler-CMHC

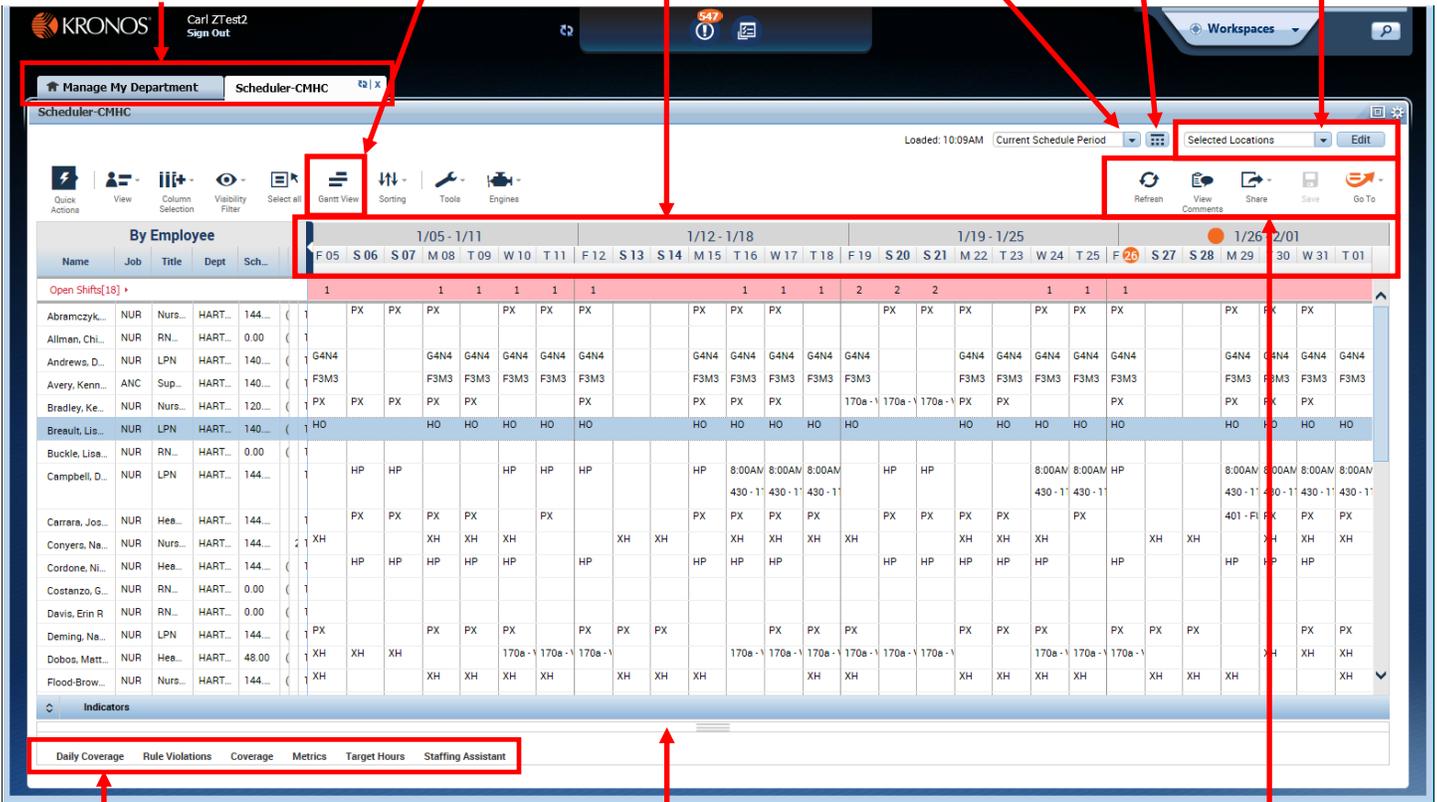
**Gantt View**

**Date Tabs:** Weekly(top) & Daily(bottom). Click and drag across tabs to view specific dates

**Time Period:** Select time period

**Calendar icon:** Specify range of dates

**Group View:** drop down list: Select locations, Saved Queries



**Daily Coverage, Rule Violations, etc...**

**Click & drag bar up or down to view Daily Coverage, Rule Violations, etc.**

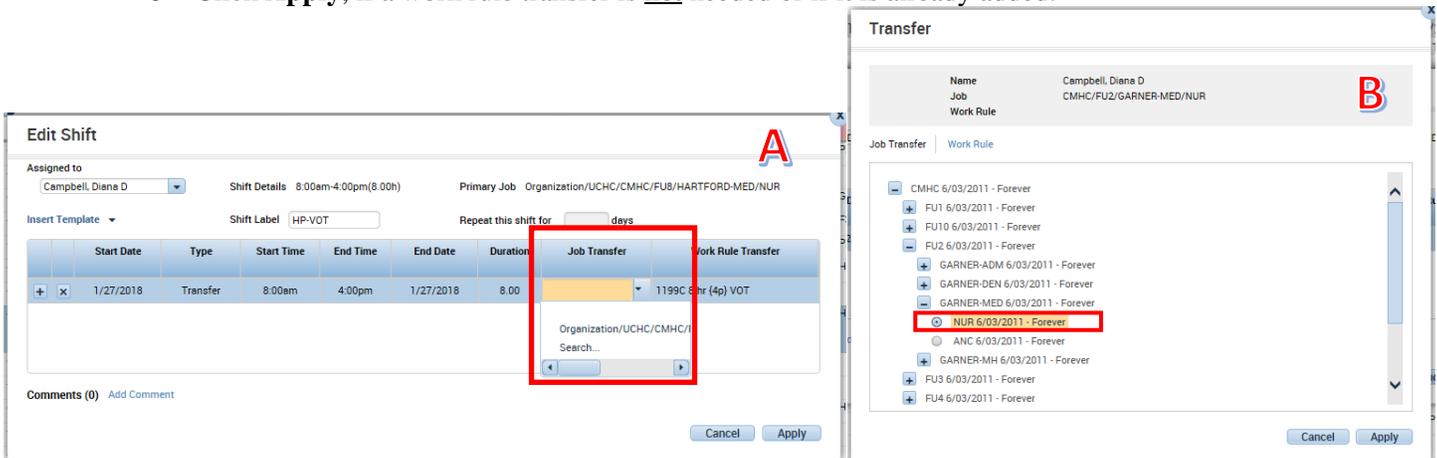
**Refresh, View Comments, Save & GoTo**

- **Group View**—select employee group to view by clicking the drop down and clicking a saved query or Select Locations.
- **Hover over Employee's Name** – view the employee's column data such as title, pay rule etc. Click and drag edge of column headings to expand column data.
- **Add a Shift** – right click on employee's appropriate dated cell and then click *Insert Shift Template* or *Add Shift*.
  - **Insert shift template** – this option will only appear when right clicking on empty cells. After selecting, scroll up and down to find shift or type in the search box to search the name and description. Searches alpha characters and numbers. (Example-G pulls shifts containing G, 7a –pulls shifts containing 7a)
  - **Add Shift** – After selecting, you can insert a shift template by clicking Insert Template (located below employee's name of Add Shift window) or enter manual times if needed. If choosing Insert Template scroll up and down to find shift or type in the search box to search the name and description.
- **Add a Pay Code** – right click on employee's appropriate dated cell and then click *Add Pay Code*.
- **Right Click on a Shift or Pay Code** – edit, delete, cut, copy, paste etc.
- **Date tabs** – Weekly tabs (top) and Daily tabs (bottom). Click and drag cursor across the tabs to change your timeframe view to just the tabs selected. Click on a date or weekly tab and you will just view that 1 day or week.
- **Daily Coverage, Rule Violations etc.** – to view click and drag the bar up as shown in graphic above.
- **Gantt View** – click for a more visual view of schedules. Useful for viewing small timeframes like a day or week. Click button again to go back to previous view (tabular view).
- **Save** – click Save to save schedule changes.

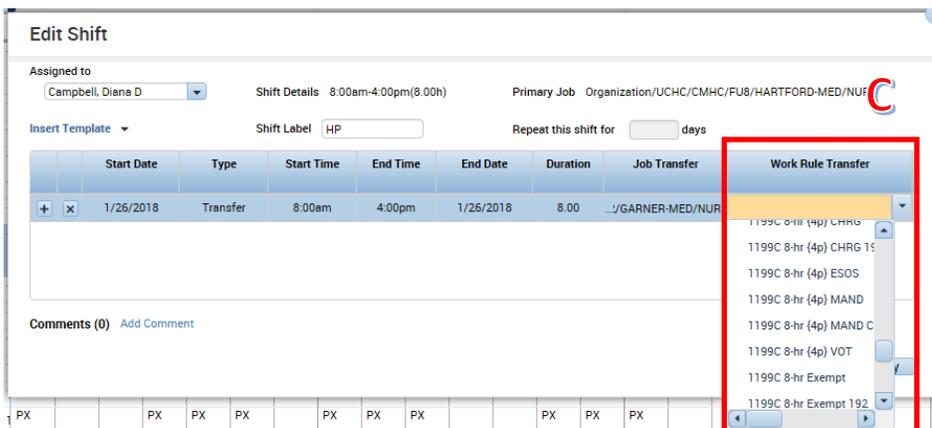
## *Scheduling Department/Job Transfers and/or Work Rule Transfers*

In order to add a Department/Job transfer and/or a work rule transfer to a scheduled shift do the following:

- Pull up the appropriate employee's schedule by either one of two ways listed below:
  - **Individual Employee Schedule View** –search for the employees name using My Employees genie on the Manage My Department tab, clicking on name, clicking GoTo button, and then clicking Scheduler-CMHC. (My Employees as shown on page 4)
  - **Group View** –select the Group View drop down and select the appropriate home location of the employee. (Scheduler-CMHC as show on page 5)
- Add a Shift or Edit the shift (if already exists) by right clicking on the appropriate dated cell or shift (if editing).
- **Department/Job Transfer**
  - Click in the **Job Transfer** cell, click the **down arrow**, and then click **Search**. (see Graphic A)
  - Transfer Window appears: (see Graphic B)
    - Click the + next to the appropriate FU the employee is transferring to, click + next appropriate department, click the button next to the job the employee is working.
    - Click **Apply**
  - Click **Apply**, if a work rule transfer is not needed or if it is already added.



- **Work Rule Transfer**
  - Click in the **Work Rule Transfer** cell, click the **down arrow**, and then choose the appropriate work rule. (see Graphic C)
  - Click **Apply**, if a dept/job transfer is not needed or if it is already added.



## Managing Timecards Navigation (Hourly Employee Displayed)

**Navigation Tabs Opened:**  
Manage My Department (home),  
Timecards

**Arrows to Toggle b/n  
Selected Employees**

**Time Period drop down:**  
Select time period

**Calendar icon:**  
Specify range of dates

**Query View  
Selection**

**Approve/  
Remove  
Approval**

**Add  
Row(+)**      **Delete  
Row(X)**      **Schedule**

**Click & drag bar up or down to  
make Timecard area wider/narrower**

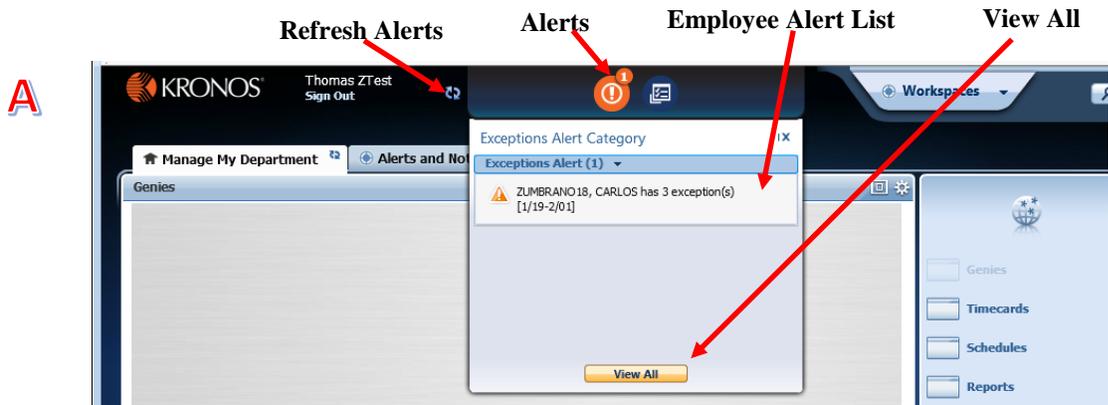
**Timecard Actions: Print,  
Refresh, Calc Tot, & Save**

- **Right Click on Employee's Name** – view the employee's pay rule and home account.
- **Right Click on Punch**
  - **Edit** – cancel meal deduction, Override Punch (new shift, in-punch, out-punch)
  - **Comments** – add comment to punch
  - **Mark as Reviewed** – mark the exception (late/early punch etc...) as reviewed. Changes color from red to green. Also, removes the alert.
- **Add a Row** - click on the + icon to create a blank row below.
- **Delete a Row** - click on the X icon on the row you wish to delete.
- **Calculate Totals** – click Calculate Totals to update the hours and totals without saving.
- **Save** – click Save to update the hours and totals at the bottom of the timecard and save changes.
- **Approve Timecard / Remove Approval** – click Approve Timecard button and Approve Timecard or Remove Timecard Approval. Approve Timecard will change the timecard color and the options to add pay codes and delete rows is no longer available.
- **Query View** – select employee list from available query list (*All Home-active emps, All-inactive & active emps*).

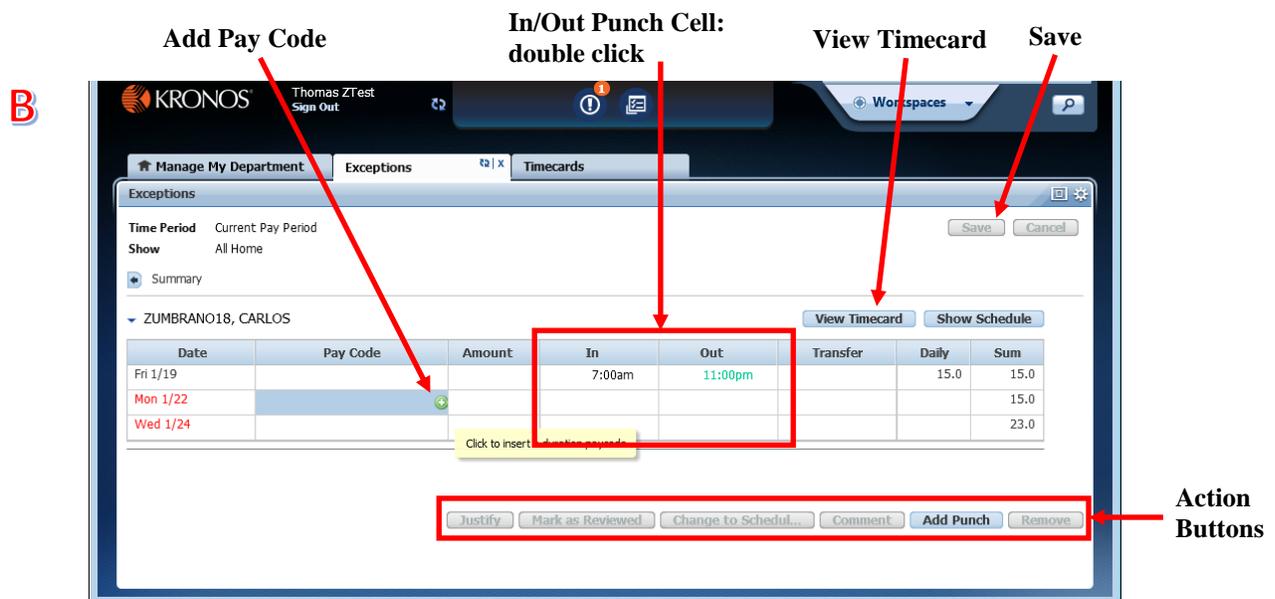
## Managing Timecard Alerts

Alerts identify possible required actions for the time approver. If any employees have a timecard exception (such as missed punch, unexcused absence, very early in, very late out, unscheduled, and invalid duration) in the *current* pay period a number displays in the top-right corner of the alerts ! icon (See graphic A). The number corresponds to the number of employees with exceptions, not the number of exceptions per employee.

- **Click Alerts (!)** – if you have an alert a number will appear next to the alert ! icon.
- **Click on Employee's Name** –brings you to the exceptions view (graphic B) for the selected employee to resolve the alert.



- **Add a Punch** – on the appropriate dated row, double click in the in or out punch cell and enter time. Then click Save. (See graphic B)
- **Add a Pay Code** – on the appropriate dated row, click the green circled + icon. Select the pay code, enter the hours, and click Ok. Then click Save. (See graphic B)
- **View Timecard** –brings you to the employee's timecard to review the resolved exception. (See graphic B)  
*Note: instead of resolving the exception in exceptions view, you can resolve the exception directly in the timecard.*
- **Action Buttons** – click on the appropriate amount or in/out punch cell, click appropriate action button. Then click Save for action to display. (See graphic B)



## Salaried Employee Navigation

**Log Off/ Sign Out**

**Timecard Actions: Print, Refresh, Calc Tot, & Save**

**Click down arrow to change Time Period View**

**Click calendar icon to specify range of dates**

**Approve/Remove Approval**

**Add Pay Code:**  
<Enter Pay Code>

**Delete Row:**  
X icon

**Click & drag bar up or down to make Timecard area wider/narrower**

Pay Code	Transfer	Fri 1/05	Sat 1/06	Sun 1/07	Mon 1/08	Tue 1/09	Wed 1/10	Thu 1/11	Total
Hours Worked		8.0			8.0	8.0	8.0	8.0	40.0
<Enter Pay Code>									
Daily Total		8.0			8.0	8.0	8.0	8.0	40.0

Pay Code	Transfer	Fri 1/12	Sat 1/13	Sun 1/14	Mon 1/15	Tue 1/16	Wed 1/17	Thu 1/18	Total
Hours Worked		8.0			8.0	8.0	8.0	8.0	40.0
<Enter Pay Code>									
Daily Total		8.0			8.0	8.0	8.0	8.0	40.0

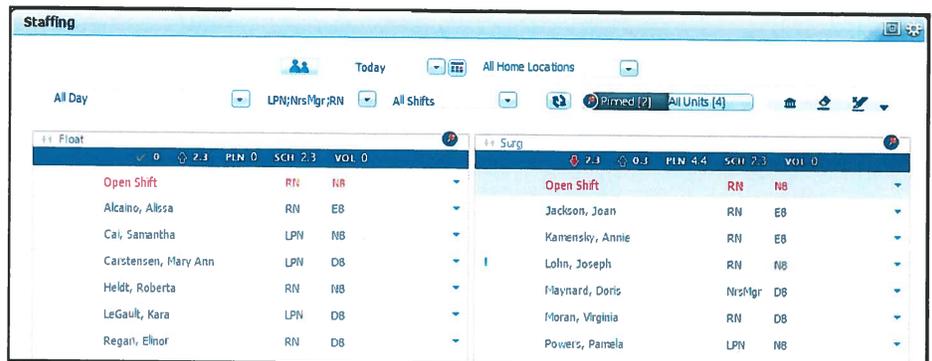
Account	Pay Code	Amount
006/31010/A/P/X/X/X	010 - BASE EARNINGS	80.0

- **Add an Additional Pay Code** - click on <Enter Pay Code> on the appropriate row.  
*Note: in order to add multiple pay codes, you must either click Calculate Totals or Save for a new row to be inserted.*
- **Delete a Row** - click on the **X** icon on the row you wish to delete.
- **Calculate Totals** – click Calculate Totals to update the hours entered and totals without saving.
- **Save** – click Save to update the hours entered and totals at the bottom of the timecard.
- **Approve Timecard / Remove Approval** – click Approve Timecard button and Approve Timecard or Remove Timecard Approval. Approve Timecard will change the timecard color and the options to add pay codes and delete rows is no longer available.

The Staffing widget offers a flexible, easy, and robust experience to managers who maintain daily schedules. This job aid describes benefits and features of the Staffing widget.

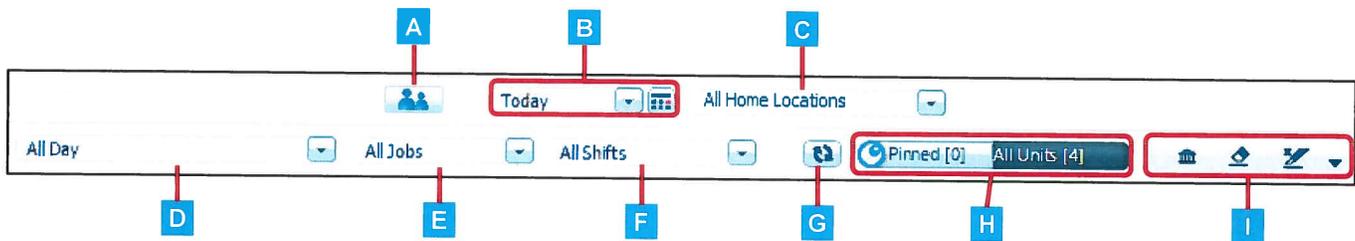
### Key benefits of the Staffing widget

- An intuitive and easy-to-use interface that lets you perform actions quickly and easily
- Visual cues and tools to facilitate daily decision-making
- Flexibility for managers to view only what they need to see to maintain their daily schedules.



### Tailoring your widget views

The Staffing widget toolbar has selections and tools that let you customize your view. The following screenshot highlights the view tools in the Staffing widget toolbar.



**A Employee pool icon** lets you toggle between showing and hiding the Employee pool.

**B Day selection options** let you choose yesterday, today, or tomorrow to display in the widget. The calendar selector lets you choose a specific date other than these, as needed.

**C Location selection filter** lets you choose All Home Locations or Select Locations such as specific units, and specific jobs within those units.

**D Day part selection filter** lets you choose All Day or individual schedule zones or shift sets you want to see. You can also define the hours of a time span that you want to see. *(For more information on how to define a time span, see the Define time span topic in this job aid.)*

**E Job selection filter** lets you choose All Jobs, or one or more individual jobs that you want to see.

**F Shift filter** lets you view all shifts, or select Coverage Setting to display shifts based on coverage settings for the selected locations. For example, certain pay codes might be excluded that do not count towards coverage.

**G Refresh** lets you refresh the items on the page to display any changes that might have been made by other managers.

**H Pinned/All Units** lets you select units to be displayed side-by-side on a page, as needed. *(For more information on how to pin units, see the Positioning units for easier transfers topic in this job aid.)*

**I Quick Actions icons** are available in the toolbar and allow you to perform common, repetitive scheduling tasks quickly.

### Positioning units for easier transfer

You can select specific units that you want to display next to one another in the widget, to make it easier to view and edit shifts and make transfers. Click the pin icon on any unit to select it as a "pinned" unit.

### Pinning and viewing pinned units

- 1 Click the pin icon on the units that you want to display together. The pin icon is red on units that are pinned. (Note: Click the pin icon of a pinned unit to unpin it.)
- 2 Click the **Pinned** indicator to display only the selected pinned units.

#### Note

If you have too many units to fit on one page, page controls will appear at the bottom of the Staffing widget. Use the page controls to navigate to other pages and pin units to view.



### Before

The screenshot shows the Staffing widget interface. The top navigation bar includes 'All Day', 'All Jobs', 'All Shifts', and 'Selected Locations'. The 'All Units' indicator is selected. The main area displays three columns: 'Float', 'Med', and 'Surge'. The 'Med' column has a red pin icon on the first unit, 'Open Shift LNA NB'. The 'All Units' indicator is highlighted with a red box and labeled '2'.

- 3 The Pinned indicator displays a red pin icon when units are pinned. Pinned units appear side-by-side.

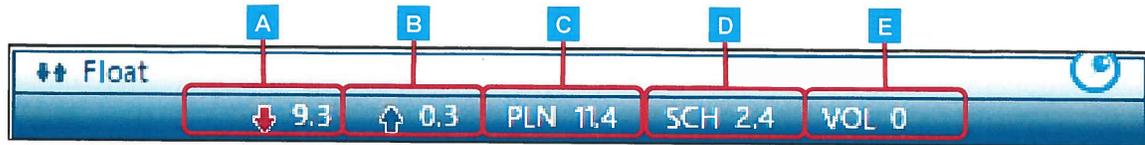
- 4 Click the **All Units** indicator to return to the view of all pinned and unpinned units.

### After

The screenshot shows the Staffing widget interface after pinning. The 'Pinned' indicator is selected in the top navigation bar. The 'Med' column now only displays the pinned unit, 'Open Shift LNA NB'. The 'All Units' indicator is highlighted with a red box and labeled '4'.

### Reviewing coverage information

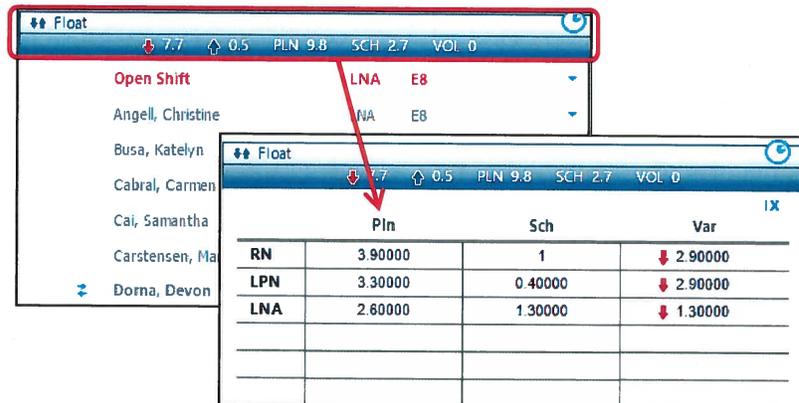
The blue bar at the top of each unit displays coverage information.



- A Undercoverage** is indicated by a down red arrow. A check mark indicates that there is no overcoverage.
- B Overcoverage** is indicated by a blue up arrow. A check mark indicates that there is no undercoverage.
- C Planned** is indicated by PLN; it is the sum of all people hours in the adjusted workload plan for a time span, divided by the time span.
- D Scheduled** is indicated by SCH; it is the sum of all people hours that are scheduled for the defined time span, divided by the time span.
- E Volume** is the projected volume for the selected time span.

### Viewing coverage details

Click the blue bar at the top of each unit to display detailed coverage information by job.



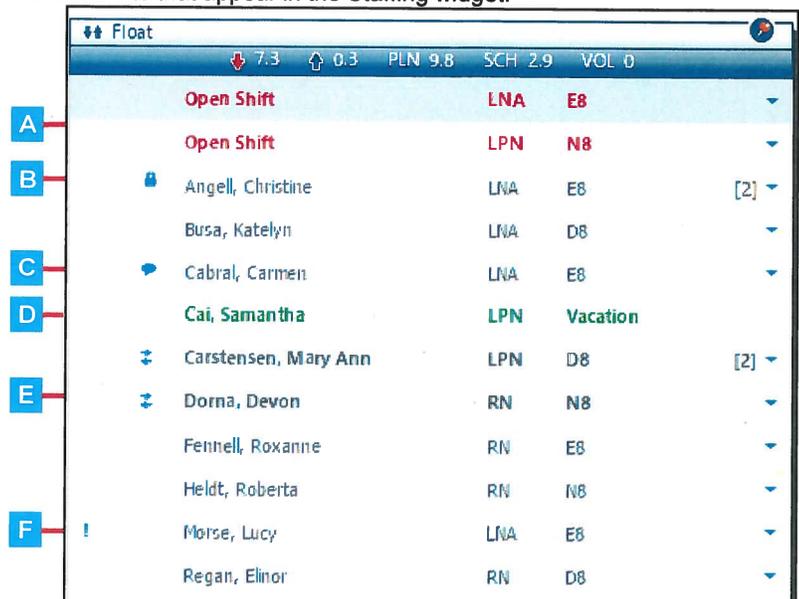
### Working with shifts

Several visual cues and shortcuts make working with shifts easy and efficient.

#### Identifying shift information

You can use the following icons and colors to identify information about shifts that appear in the Staffing widget.

- A Open shifts** appear in red text.
- B Locked shifts** are indicated with the lock icon.
- C Comments and notes** are indicated with the note bubble icon.
- D Shifts with pay codes** appear in green text.
- E Transferred shifts and shift segments** are indicated with a double arrow icon.
- F Shifts with Warning rule violations** are indicated with an exclamation point.

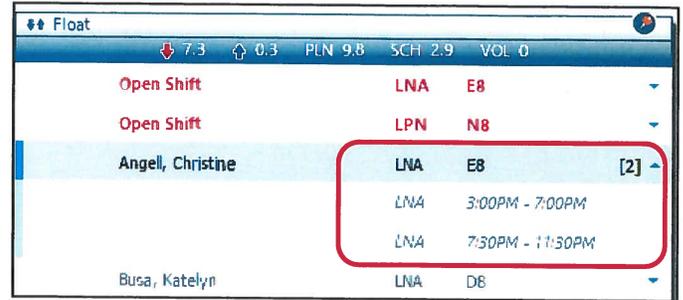


### Transferring shifts and shift segments

You can transfer whole shifts and segments of shifts in the Staffing widget.

Shifts that have segments display the number of segments in brackets after the shift line item. You can expand the shift to display the segments, as shown in the screenshot to the right.

You can click and drag a whole shift or a shift segment to another unit to perform a transfer.

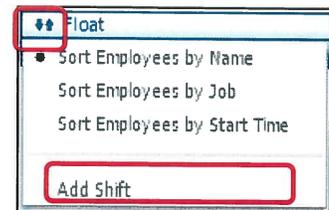


### Adding an open or assigned shift to a unit

You have the flexibility to add either an open shift or a shift with an employee assigned to a unit.

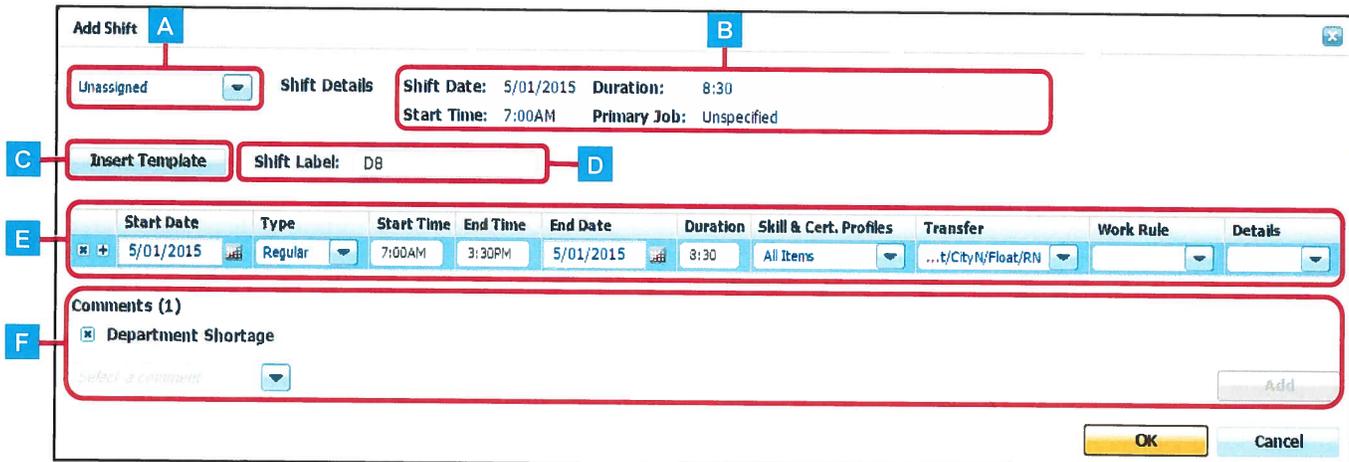
#### To add a shift:

1. From the applicable unit, click the action drop-down list and select **Add Shift**.
2. Use the Add Shift dialog box to enter the applicable shift information (see the *Editing shift attributes in the Shift Editor* topic, below).



### Editing shift attributes in the Shift Editor

You can easily perform editing tasks directly from the Add Shift/Edit Shift dialog box.



**A Employee name:** Select either the name of the employee to whom to assign the shift or Unassigned to create an open shift. Available employee names are based on the selected location.

**B Shift details:** This section displays information about the shift.

**C Insert Template:** Click to find and insert a shift template. If you select a shift template, the information in the shift segments is overridden.

**D Shift Label:** Lets you add a shift label. If the shift template information has been modified, it is recommended that the label also be modified to reflect these changes.

**E Shift Segments:** Add or delete a shift segment using the + and x icons.

- Use the **Transfer** drop-down to select a job associated with the selected location.
- If required, use the **Work Rules** drop-down to select a work rule to apply to the shift.

**F Comments:** Used to add comments and notes to the shift.

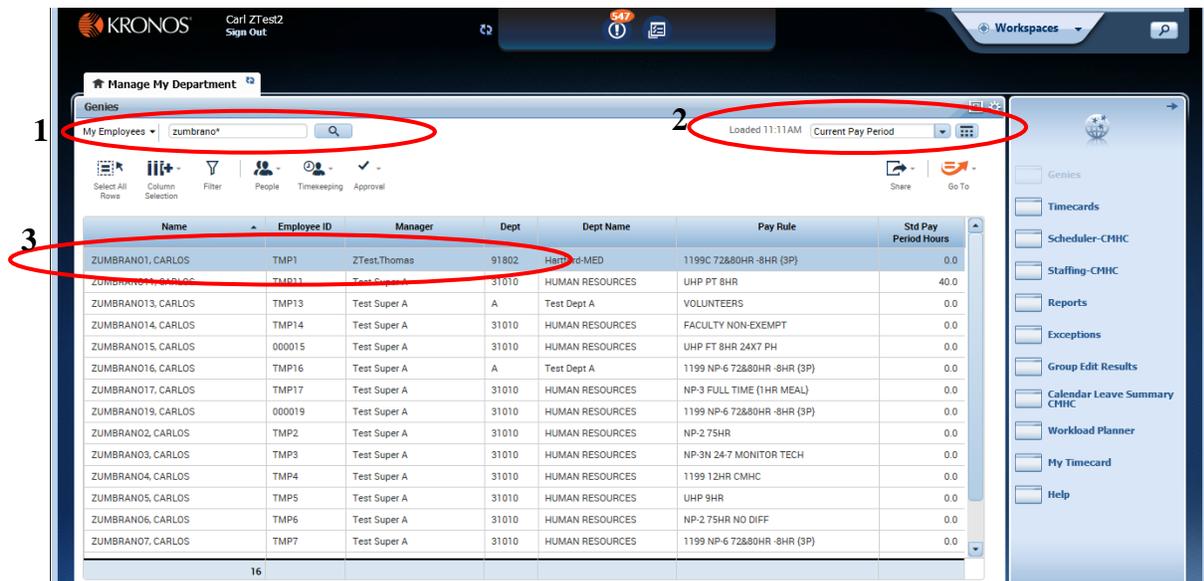
#### To edit a shift:

1. Hover on the applicable shift and then click the arrow icon in the circle.
2. Select **Edit Shift**.
3. Make the necessary changes to the shift, and then click **OK**.

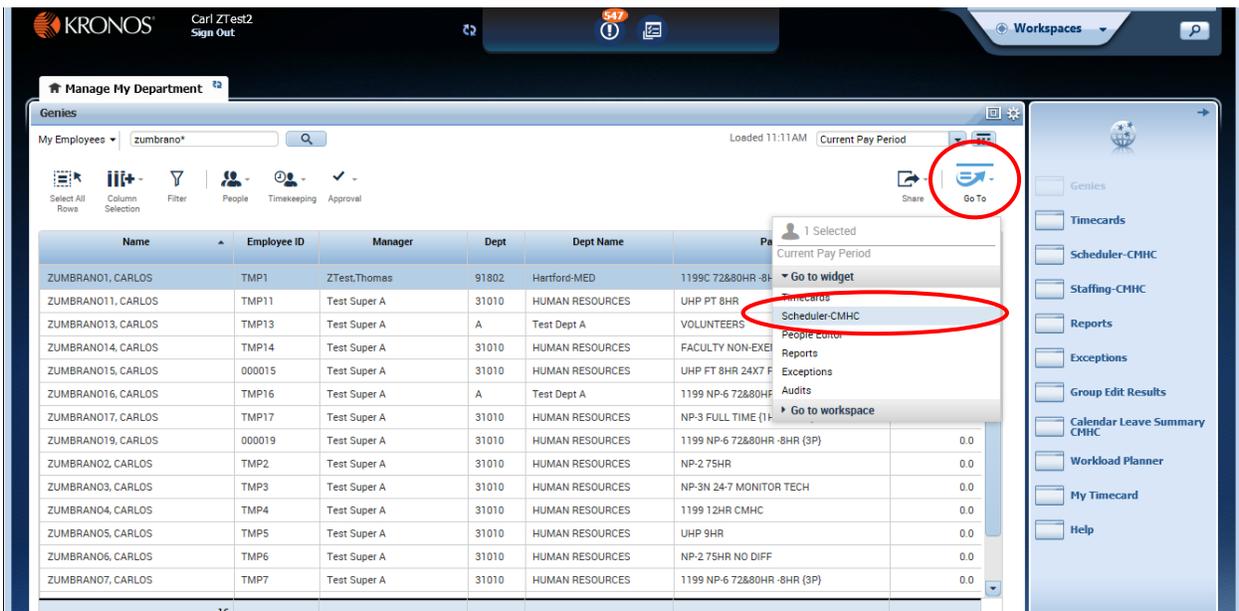


# Instructions on Entering Schedule Patterns for Employees

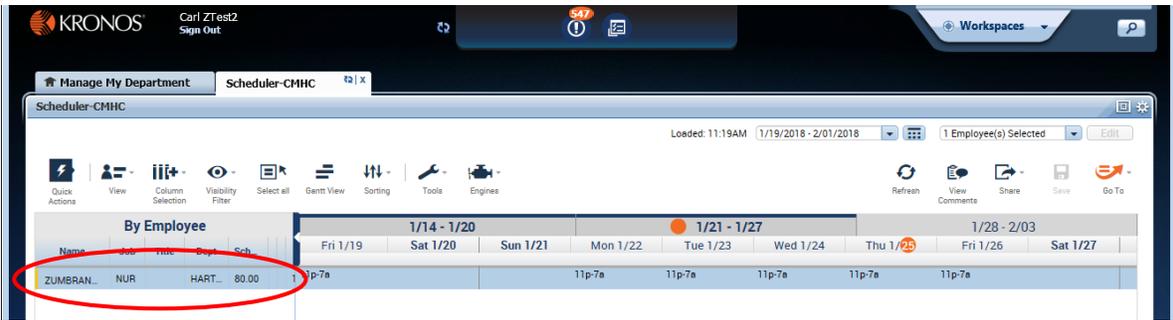
1. To find an Employee using My Employees, type part of lastname with an asterisk(\*)  
Ex – zumbrano\* (as seen below)
2. Click on Employee Name (highlights in light blue, ex. - ZUMBRANO1,CARLOS) (as seen below)
3. **\*\*Important:** Select the Time Period you want to enter the schedule pattern for.  
(Kronos will NOT let you save your schedule pattern if the Scheduled Start Date is outside of you Time period selection.)



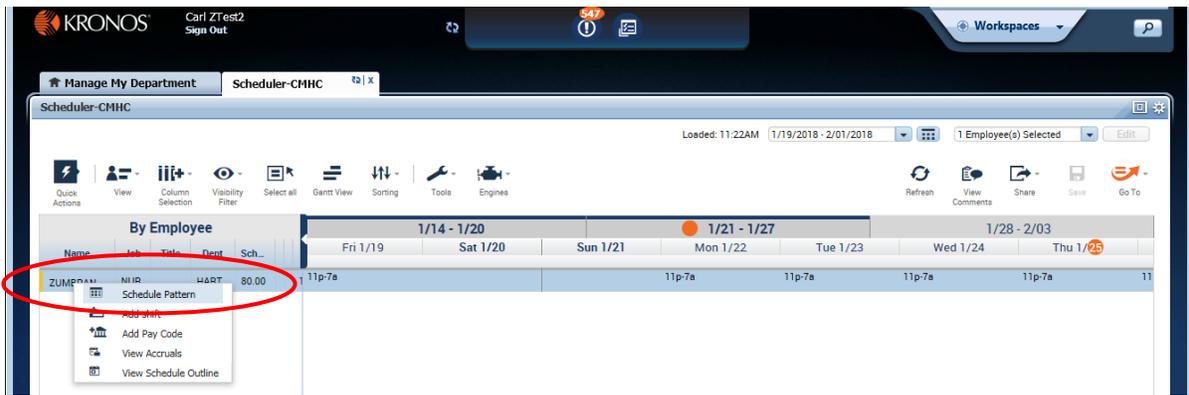
3. Click **GoTo** button and then **Scheduler-CMHC**



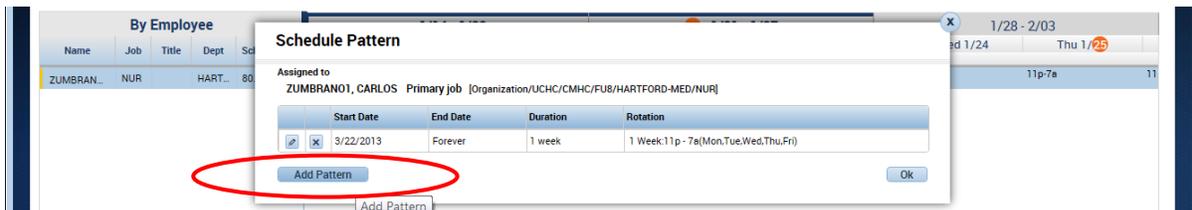
4. Click on Employee name, so highlighted in light blue. (as seen below)



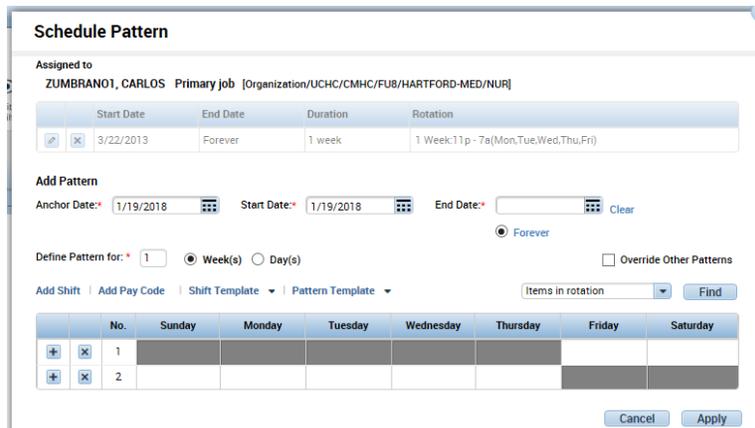
5. Right Click on Employee name and then click **Schedule Pattern**. (as seen below)



6. Click **Add Pattern**. (as seen below)



7. Brings you to the Pattern Editor Screen. (as seen below)



8. Enter the **Start Date** first (*NOT the Anchor Date*) (as seen below). Example Friday 1/19/2018  
**\*\*\*Always choose the Friday that the Bi-Weekly Pay Period begins on.**

Note: if the pay period begin Friday you choose is not with your specified Kronos Time Period, then you will not be able to save the pattern. You will need to change your specified time period that includes your start date.

**Schedule Pattern**

Assigned to  
 ZUMBRANO1, CARLOS Primary job [Organization/UCHC/CMHC/FU8/HARTFORD-MED/NUR]

Start Date	End Date	Duration	Rotation
3/22/2013	Forever	1 week	1 Week:11p - 7a(Mon,Tue,Wed,Thu,Fri)

**Add Pattern**

Anchor Date: 1/19/2018 Start Date: 1/19/2018 End Date: Clear

Define Pattern for: 1  Week(s)  Day(s)

Add Shift | Add Pay Code | Shift Template | Pattern Template

Items in rotation: Find

Override Other Patterns

Cancel Apply

9. Enter the **Anchor Date** (as seen below)

**\*\*\*Choose the Sunday before the Start Date** you selected in the prior step, for our example it would be Sunday 1/14/2018.

**Schedule Pattern**

Assigned to  
 ZUMBRANO1, CARLOS Primary job [Organization/UCHC/CMHC/FU8/HARTFORD-MED/NUR]

Start Date	End Date	Duration	Rotation
3/22/2013	Forever	1 week	1 Week:11p - 7a(Mon,Tue,Wed,Thu,Fri)

**Add Pattern**

Anchor Date: 1/14/2018 Start Date: 1/19/2018 End Date: Clear

Define Pattern for: 1  Week(s)  Day(s)

Add Shift | Add Pay Code | Shift Template | Pattern Template

Items in rotation: Find

Override Other Patterns

Cancel Apply

10. If the employee already has a schedule assigned to them, Check **Override Other Patterns** (this will replace the old schedule pattern and with the new schedule pattern).

**Schedule Pattern**

Warning Selecting Override may delete shifts or unavailable days, except for locked days or shifts.

Assigned to  
 ZUMBRANO1, CARLOS Primary job [Organization/UCHC/CMHC/FU8/HARTFORD-MED/NUR]

Start Date	End Date	Duration	Rotation
3/22/2013	Forever	1 week	1 Week:11p - 7a(Mon,Tue,Wed,Thu,Fri)

**Add Pattern**

Anchor Date: 1/14/2018 Start Date: 1/19/2018 End Date: Clear

Define Pattern for: 1  Week(s)  Day(s)

Add Shift | Add Pay Code | Shift Template | Pattern Template

Items in rotation: Find

Override Other Patterns

11. If the schedule is a **2-week rotating pattern** then click the + icon to add a 2<sup>nd</sup> row as seen below. (as seen below)

**1-week pattern** - same scheduled days every week—ONLY 1 row needed

**2-week pattern** – week1(Fri-Thru) and week2(Fri-Thru) have different scheduled days. – 2 rows need.

**Schedule Pattern**

Assigned to  
ZUMBRANO1, CARLOS Primary job [Organization/UHC/CMHC/FU8/HARTFORD-MED/NUR]

Start Date	End Date	Duration	Rotation
3/22/2013	Forever	1 week	1 Week:11p - 7a(Mon,Tue,Wed,Thu,Fri)

Add Pattern  
Anchor Date: 1/14/2018 Start Date: 1/19/2018 End Date: Clear  
Forever

Define Pattern for: 2  Week(s)  Day(s)  Override Other Patterns

Add Shift | Add Pay Code | Shift Template | Pattern Template | Items in rotation | Find

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1							
2							

## 12. SCHEDULE EXAMPLE – 2 Week Rotating Pattern Steps

**Zumbrano1 Schedule:** 8am - 4pm

**Week1 Schedule:** Friday, Monday, Tuesday, Wednesday, Thursday

**Week2 Schedule:** Saturday, Sunday, Monday, Wednesday, Thursday

**Step 1:** Click on the day box the schedule starts (Example above is a Friday, so click in Friday Box on the First Row(day box labeled #1).

\*\*\*If the schedule starts on *Sunday* then you would choose the Sunday box on the *second* row (not labeled with a number in example below).

\*\*\*Choose the day box that the Scheduled Start Time falls on, *NOT* the end time (example start time above is 8am).

**Step 2:** Press and Hold down the **Control(Ctrl)** key and select the appropriate boxes. For this Example, click the boxes in the **Numbered order** as seen below. So, you have to go to the Right, Down, and Around.

**Schedule Pattern**

Assigned to  
ZUMBRANO1, CARLOS Primary job [Organization/UHC/CMHC/FU8/HARTFORD-MED/NUR]

Start Date	End Date	Duration	Rotation
3/22/2013	Forever	1 week	1 Week:11p - 7a(Mon,Tue,Wed,Thu,Fri)

Add Pattern  
Anchor Date: 1/14/2018 Start Date: 1/19/2018 End Date: Clear  
Forever

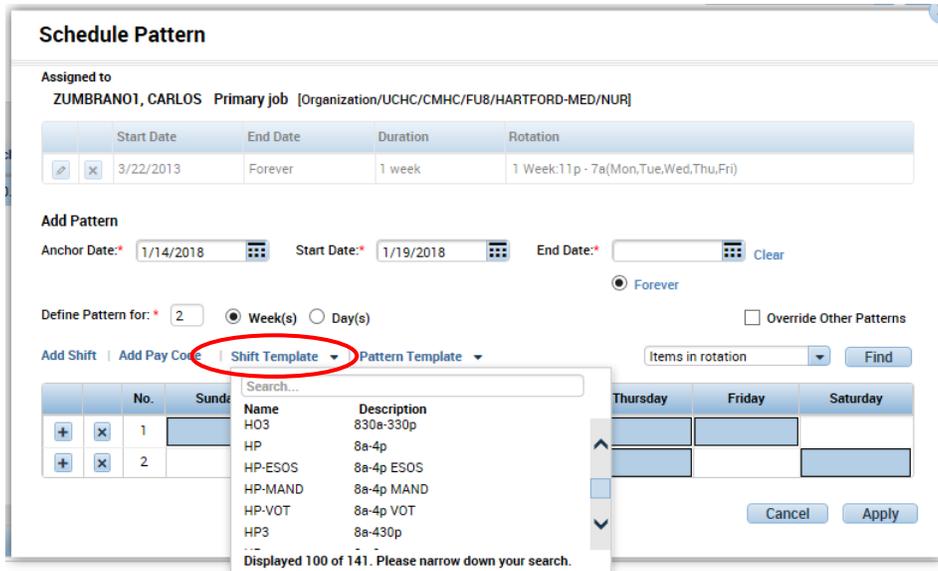
Define Pattern for: 2  Week(s)  Day(s)  Override Other Patterns

Add Shift | Add Pay Code | Shift Template | Pattern Template | Items in rotation | Find

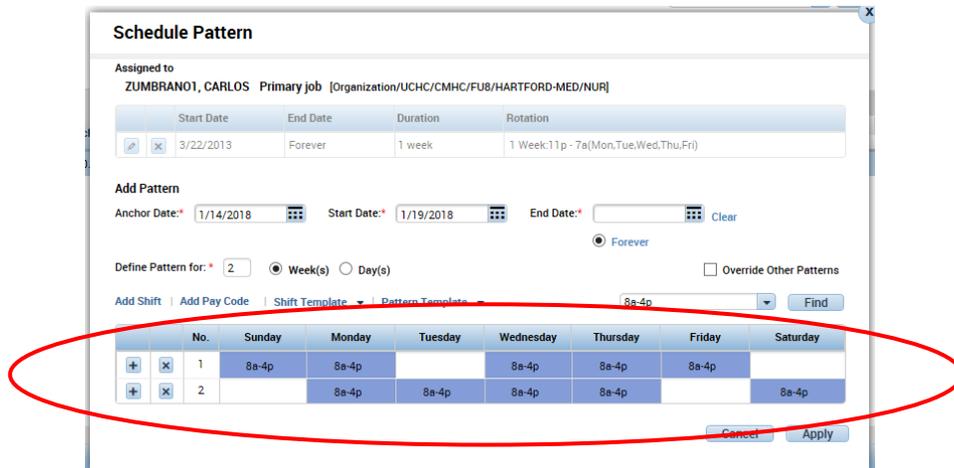
No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		7	8		9	10	1
2			2	3	4	5	6

Cancel Apply

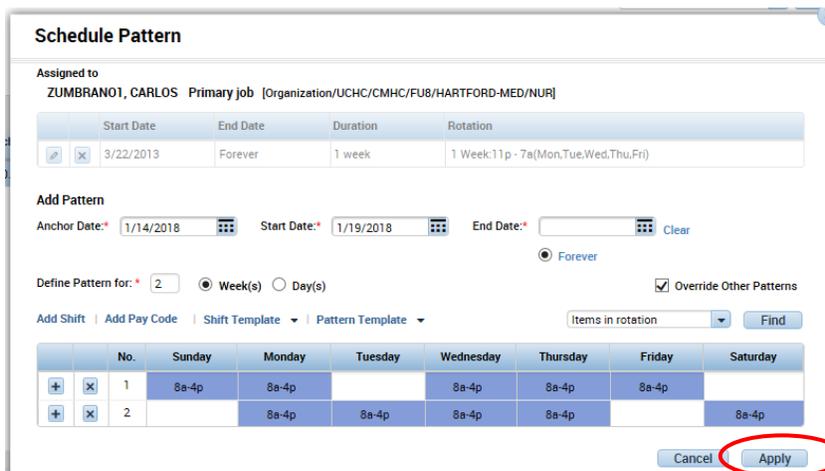
**Step 3:** Click **Shift Template** and then scroll to click on the appropriate **Shift Code** or type in the search.. box then click on the shift code. (For Example, HP is 8a-4p.)



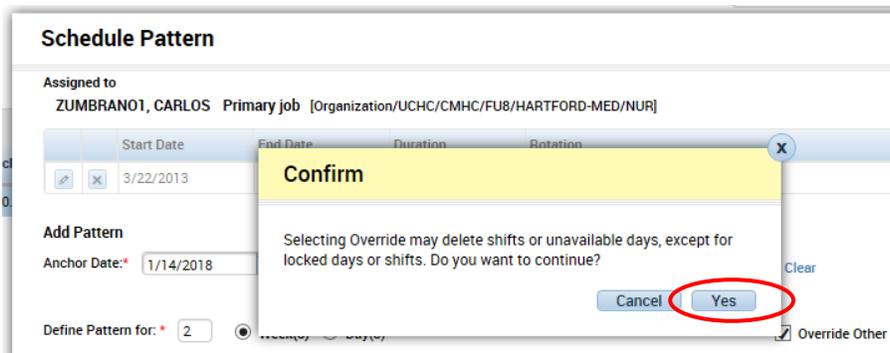
Schedule Pattern populates with the selected HP (8a-4p) shifts, as seen below.  
 \*For an example, of a 1-week Monday - Friday, HP (8a-4p) pattern, see bottom of **page 7**.



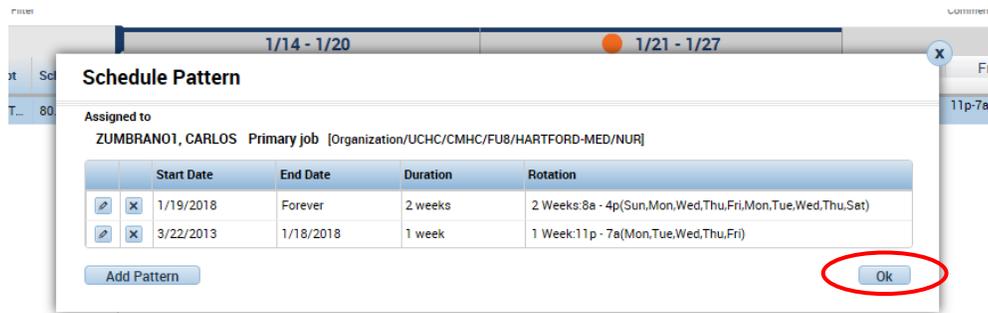
**Step 4:** Click **Apply**



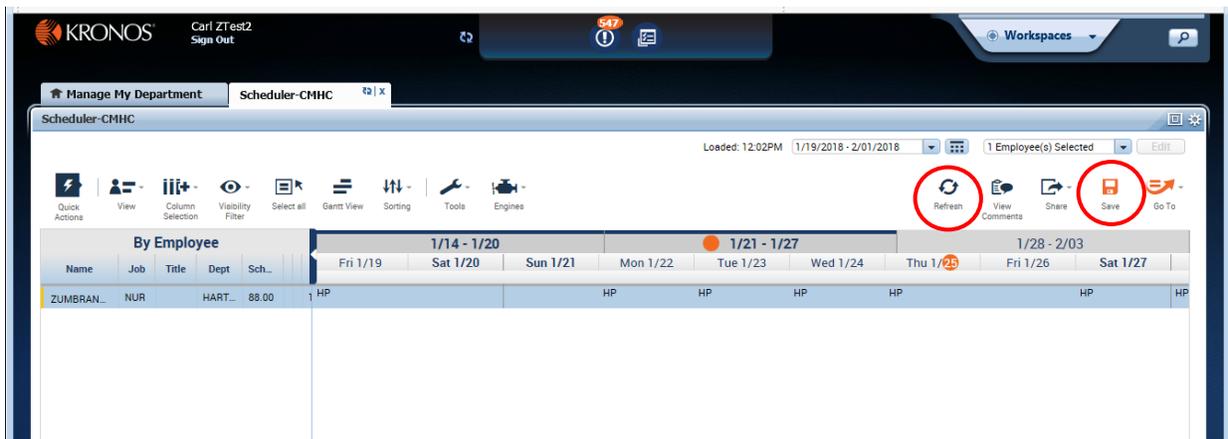
Step 5: Click **Yes**



Step 6: Click **OK**



Step 9: Verify the schedule was entered correctly before pressing **Save**.  
Click **Save** if correct. If incorrect, click **Refresh** to start over Or you can edit the pattern you just created by going to the next page.



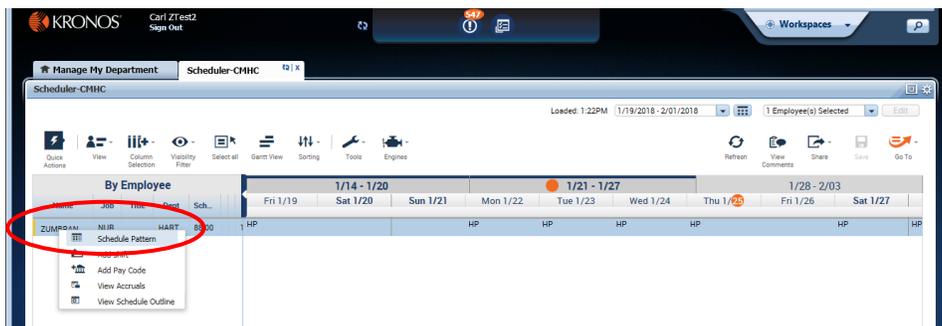
\*You have completed the steps for adding a 2 week schedule pattern.

## Editing a Schedule Pattern

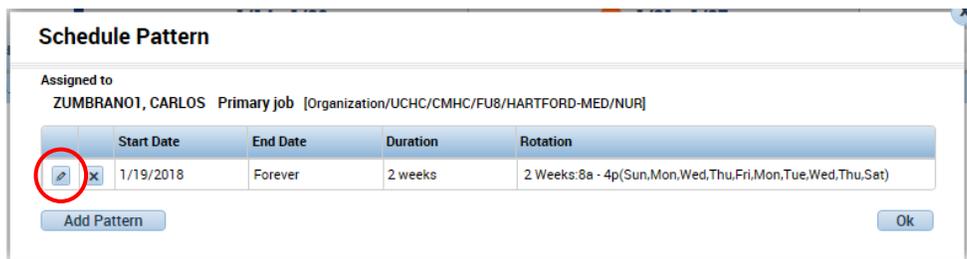
(NOTE: Never edit a schedule pattern created in the past!!!)

Before or After Saving, if you need to Edit your pattern you just entered.

1. Right click on employee's name and click **Schedule Pattern**



2. Click the Pencil icon and then edit schedule pattern as needed.



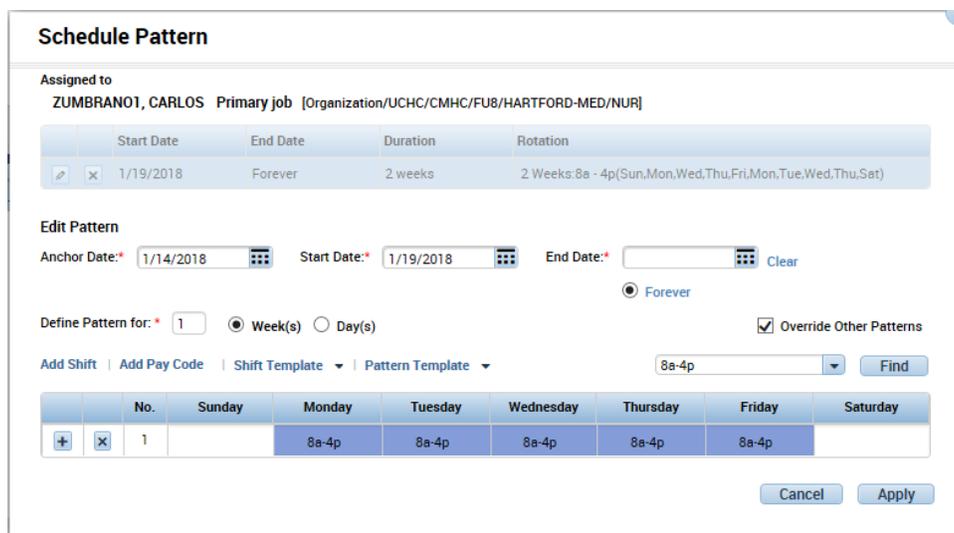
## Schedule Example - 1 Week Rotating Pattern

**Example A: Standard Monday thru Friday HP (8a-4p) pattern.**

Start Date = 1/19/2018 (Friday, beginning of a pay period)

Anchor Date = 1/14/2018 (Sunday, prior to Work Start Date)

Day Boxes Grid = 1 Row Needed for Monday thru Friday Day boxes, because this schedule is only a 1-week repeating pattern.



## SHIFT CODE LEGEND

TIME	NAME		TIME	NAME		HOUR	NAME
1:00 AM	A		1:00 PM	M		:15	1
2:00 AM	B		2:00 PM	N		:30	3
3:00 AM	C		3:00 PM	O		:45	4
4:00 AM	D		4:00 PM	P			
5:00 AM	E		5:00 PM	Q			
6:00 AM	F		6:00 PM	R			
7:00 AM	G		7:00 PM	S			
8:00 AM	H		8:00 PM	T			
9:00 AM	I		9:00 PM	U			
10:00 AM	J		10:00 PM	V			
11:00 AM	K		11:00 PM	W			
12:00 PM	L		12:00 AM	X			
<b>Examples</b>							
<b>Shift</b>	<b>Shift Name</b>		<b>Shift</b>	<b>Shift Name</b>			
7a-3p	GO		715a-315p	G1O1			
8a-4p	HP		7a-330p	GO3			
830a-430p	H3P3						
***If you are unable to find a Shift Name in your Shift view, please contact Brian Kleinhenn(x4061) or Ken Lowell(x2427) to add to your Shift profile.							