DCF   Kronos Scheduler: Superuser Pattern Template Guide

PURPOSE

Assigning a Schedule Pattern Template

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Schedule pattern templates let you quickly apply a set of shifts to staff who work the same shifts on a regular basis. A schedule pattern template consists of one or more shifts that repeat over a specified time period and have been saved for reuse.
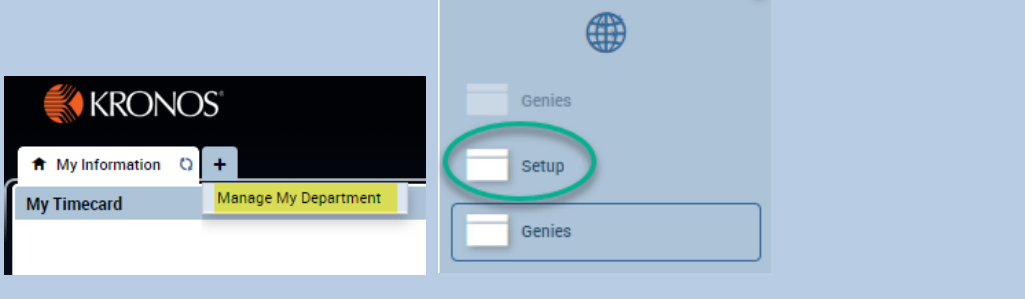
Shift Templates make this process easier. If you use these in concert with Pattern Templates, it decreases an otherwise time-consuming task.
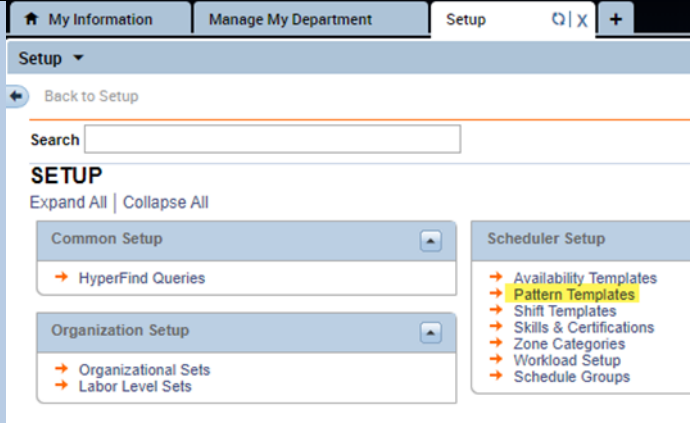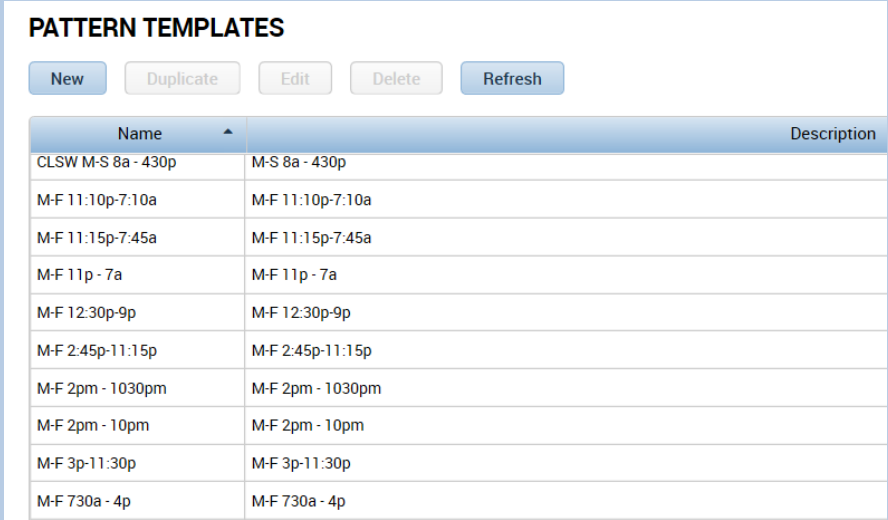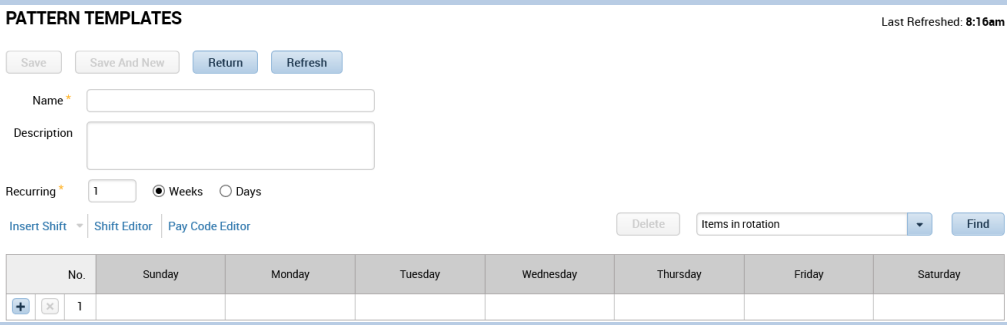
Shift Templates — A Shift Template is a shift that has a name and defined segments and attributes, but no date or assigned employee.

Example

Karen Ortiz regularly works 8-hour shifts every other week on different days in Solnit South Custody Sachem. You want to create and apply a schedule pattern for the associate that repeats in a schedule planner. You know that a pattern template exists that defines this schedule pattern, so you will use it because it is easier and faster than adding the schedule manually.

Pattern Template Creation – Navigation

	Steps to create a Pattern Template	Description
1	Select the plus tab, then Manage My Department. From the Related Items list, click Setup.	

2	Select **Setup** > **Scheduler Setup** > **Pattern Templates**	
3	Create or edit a template. Enter a Name using the DCF convention Enter a description	**PATTERN TEMPLATES** New Duplicate Edit Delete Refresh | Name ▲	Description
CLSW M-S 8a - 430p	M-S 8a - 430p
M-F 11:10p-7:10a	M-F 11:10p-7:10a
M-F 11:15p-7:45a	M-F 11:15p-7:45a
M-F 11p - 7a	M-F 11p - 7a
M-F 12:30p-9p	M-F 12:30p-9p
M-F 2:45p-11:15p	M-F 2:45p-11:15p
M-F 2pm - 1030pm	M-F 2pm - 1030pm
M-F 2pm - 10pm	M-F 2pm - 10pm
M-F 3p-11:30p	M-F 3p-11:30p
M-F 730a - 4p	M-F 730a - 4p	
4	**Insert Shift**. Select a shift template. A pattern cannot contain an Unavailable shift template. **Shift Editor**. Define the shift. Click **OK**. **Pay Code Editor**. Select a pay code. Enter the duration or money in Amount. Enter the Start Time. Optionally, select a Transfer. Click **OK**.	

	Example: Select a Vacation pay code to create a vacation pattern.	**PATTERN TEMPLATES**

Save · Save And New · Return · Refresh

Name * Solnit S 7a-330p OFF Fri Sat

Description Off Friday Monday Week 1 / Off Sat Sun Week 2

Recurring * 2 ● Weeks ○ Days

Insert Shift ▾ · Shift Editor · Pay Code Editor

	No.	Sunday	Monday
⊕ ✕	1	7:00am - 3:30pm	
⊕ ✕	2		7:00am - 3:30pm

Save · Save And New · Return · Refresh

Name * Solnit S 7a-330p OFF Fri Sat

Description Off Friday Monday Week 1 / Off Sat Sun Week 2

Recurring * 2 ● Weeks ○ Days

Insert Shift ▾ · Shift Editor · Pay Code Editor   Delete · 7:00am - 3:30pm ▾ · Find

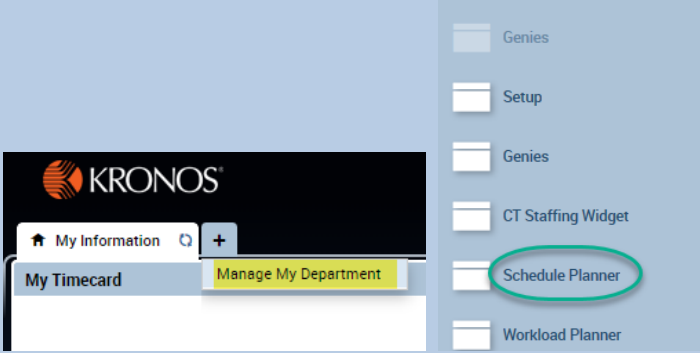|	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
⊕ ✕	1	7:00am - 3:30pm		7:00am - 3:30pm	7:00am - 3:30pm	7:00am - 3:30pm	7:00am - 3:30pm	
⊕ ✕	2		7:00am - 3:30pm	7:00am - 3:30pm	7:00am - 3:30pm	7:00am - 3:30pm		7:00am - 3:30pm	
5	To copy a block of time, right click the cell -> **Copy**
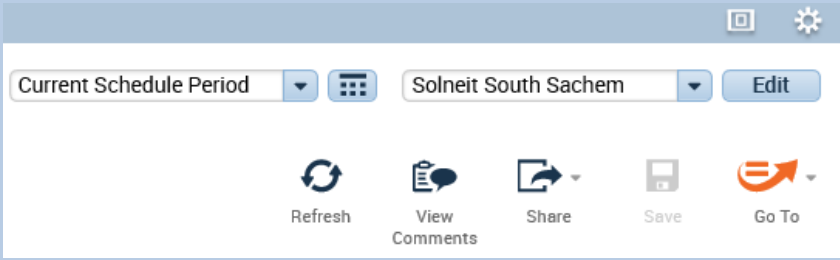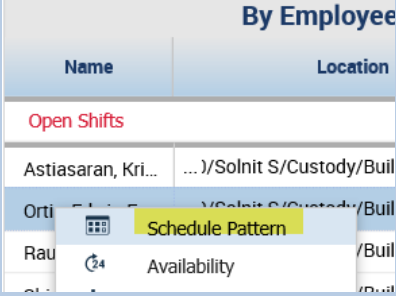
To Paste on 2 days or more hold the Ctrl key and left click mouse on the desired days. Then right click -> **Paste** | Monday

7:00am - 3:30pm

Shift Editor
Add Pay Code
Add Shift
Cu   Copy
Copy
Delete

	Monday	Tuesday	Wednesday
		7:00am - 3:30pm	7:00am - 3:30pm
	7:00am - 3:30pm	7:00am - 3:30pm	7:00am - 3:30pm

Add Pay Code
Add Shift
Paste |

Pattern Template Assignment – Navigation

	Assigning a Pattern Template to an Employee	Description
1	Select the plus tab, then Manage My Department. From the Related Items list, click Schedule Planner.	
2	In the **Location** Show drop-down list, select a department from the Organization Map which will display employees for you to view. In the screen shot used a Location Query that contains the desired location (i.e. Solnit South Custody Sachem)

In the **Time Period** drop down list, select a specific time period. | |
| 3 | Right-click on the associate's name. Select **Schedule Pattern** | |

4	Insert a Pattern. The Anchor Date defines the first week of the pattern. This date must be on or before the Start Date. And is usually on a Sunday. In the Start Date field, use the calendar or type a date to mark the beginning of the pattern you are about to implement. In the End Date field, type the last date for which this pattern assignment applies. To have the assignment in effect with no end date, accept the default of Forever.	 Click APPLY
5	You may need to **Refresh** the schedule Planner a couple times until the Pattern renders through the database	