How to Assign a Schedule Pattern to an Employee in
UKG Workforce Scheduler

Assigning schedules to employees helps timekeepers quickly identify the differences between worked and scheduled time and when the employee is early, late, or absent.

1. Log into UKG Workforce Timekeeper.
2. Access the employee via **Quickfind** or another Genie.
3. Highlight the employee record
4. Select **GoTo,** select **Schedule Planner**.

Toolbar:

Quick Actions: Are one click short cuts to allow you to complete multi-step common tasks
While Quick Actions are selected no other options are available until Quick Actions is clicked again and closed

View: Allows you to view by employee, schedule group, or Employment Terms (*we do not use this*)

Visibility: Select available columns to add or remove from grid

Select All: Allows you to select all items with in a schedule

Gantt or Tabular View:
Grant view: Displays a graphic view
Tabular View: Only displays start and end times. It shows shifts only in the day the shift starts even if it flows into the next day

Tools: *displays but options are not turned on*

Engines: *displays but options are not turned on*

To Insert Pattern (a group of shifts that repeat over a specified time period)

5. In the Schedule Planner right click on the employee name and select **Schedule Pattern** for multiple days or **Add Shift** for one day.
6. Click the **Insert Pattern** button.

7. The **Pattern Start Date** will change from Today's date, to the date of the Pattern was created. This is NOT the employee's start date. (*Edit the Pattern Start Date to the current Schedule or Pay Period begin date*)

8. Enter **Work Start Date**. Note: This is the date when the employee will begin working the Pattern.
9. Provide an **End Date** for the assignment, or select the **Forever** radio button.
10. Select **Override Other Patterns** if the employee has another pattern you want deleted or updated. You will receive a warning (*Selecting Override may delete shifts or unavailable days, except for locked days and shifts*)
11. Click **Apply**.
12. Click **Save**.
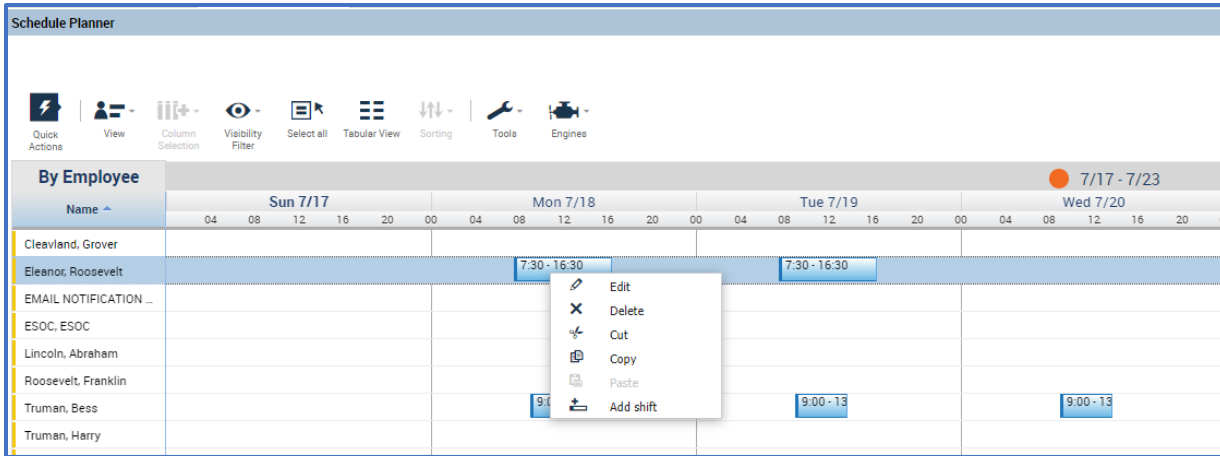
NOTE:

It will take a short time for the new Schedule Pattern assignment to update in the employees record. This time may vary depending on the number of employee's being edited and the size of the facility. (*You may need to refresh the workspace to see the updated schedule*)

To Add a Shift

1) If no Schedule Pattern exists for the employees work schedule you can **manually add** the Shift times.
2) Select **Apply**

Viewing applied Schedules:

1. When you return to the schedule planner you can view the schedules applied
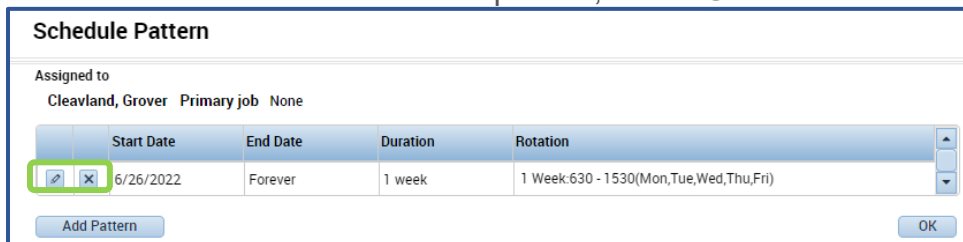2. You can right click on the scheduled cell for additional options

Quick Actions (Add a single shift):

1. Select **Quick Actions**
2. Select **Insert shift template**
3. Select a **shift pattern**
4. The cursor will change to a cross hair
5. Click the cell where you want to add the shift
6. Select **SAVE**
7. Select **Quick Actions** icon to close

To Edit or Delete a Pattern

1. Highlight the employee record
2. Select **GoTo,** select **Schedule Planner**.
3. In the Schedule Planner right click on the employee name and select **Schedule Pattern.**
4. If the employee has a current Schedule Pattern it will appear.
5. You can select the pencil icon to edit the pattern
6. You can select the **X** to delete the pattern, select **OK**