Making a short-term change to an employee’s schedule

If an employee requests a schedule change for a defined period of time, you can set up a new schedule pattern for that employee with start and end dates, so that neither you nor your employee has to worry getting it changed back to the normal schedule.

1. Click on the Schedules link in the Related Items pane.

![Schedules link in Related Items pane]

2. Right-click on the employee’s name and select Schedule Pattern from the shortcut menu.

![Schedule Pattern menu]

3. The Schedule Pattern appears with information about the employee’s current pattern.

4. Click on the Add Pattern command in the lower-left side of the window.

![Schedule Pattern window]

5. In the Schedule Pattern window, you will need to complete several steps to update the pattern correctly.
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Step 1: Select the new pattern.
- Click on the dropdown arrow beside Pattern Template to select the appropriate pattern. You may need to scroll to find the correct option.

![Pattern Template dropdown menu]

- Once you have found the right pattern, click to select it. The pattern will populate the week schedule at the bottom of the window.

Step 2: Specify start date.
- Select the date the new pattern starts.

Step 3: Specify end date.
- Select the date the new pattern ends.

Note: the anchor date does not need to be changed; that date simply reflects when the pattern template was created.

Step 4: Check the “Override Other Patterns” box.
- A warning appears about the potential to delete other shifts; it will disappear in a few seconds, and it is okay to disregard it.
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Step 5: Review all information to verify that you have selected the correct dates.
- A completed temporary schedule change, including start and end dates, is shown in the below screenshot:

![Schedule Pattern](image)

Step 6: click on the Apply command.
- Make sure that you have selected the correct dates, etc. and then click on the Apply command.
- Because you are overriding existing information, you will get another warning window, pictured below. Click on the Yes command.

![Confirm](image)
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The Schedule Pattern information window appears listing existing patterns. In the screenshot below:

- Row 1 = what the employee will revert back to after the temporary pattern expires
- Row 2 = the temporary change that you just added with the correct start and end dates
- Row 3 = the pattern the employee currently uses (pre-change)

6. Click on the **OK** command to complete the change.
7. Click on the **Save** command to save the new pattern information.

8. As the system processes the change, you may see “Applying pattern” appear in red text below the employee’s name.

9. To review your work, open the employee’s timecard and navigate to the start date for the new pattern to make sure the **Schedule** column is correct.