

CalTime: How to Add, Edit, and Remove Schedules

[Access Schedules \(pg. 1\)](#)

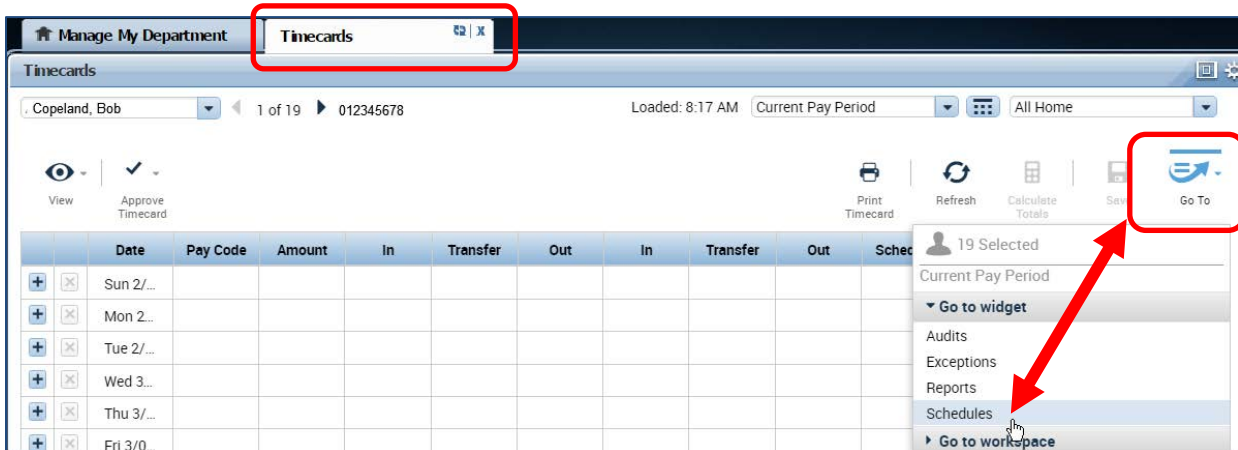
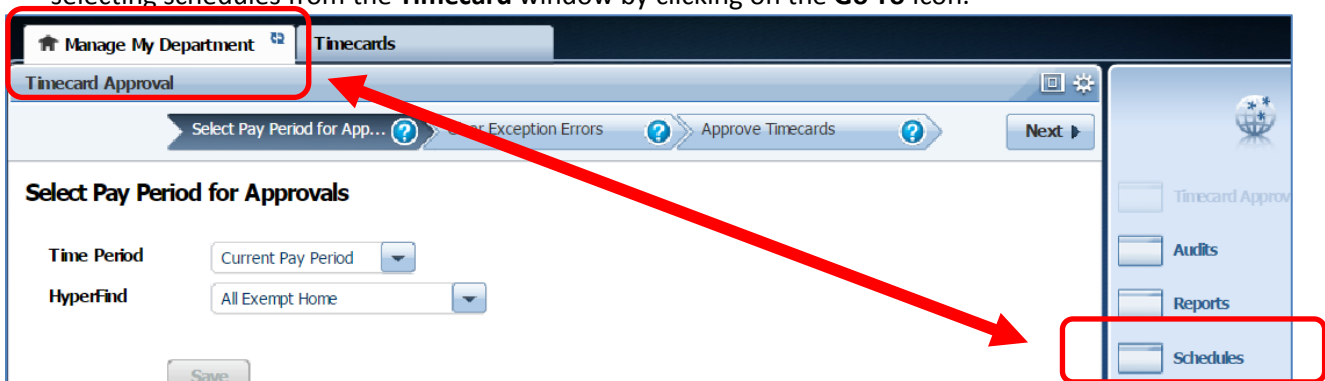
[Adding a Schedule from a Pre-defined Shift \(pg. 2\)](#)

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ACCESS SCHEDULES

Employees are not required to have schedules however some departments have decided to assign schedules to their employees. Please be aware that if the employee does not record time according to their assigned schedule then CalTime will flag an error on the timecard which must be corrected by the employee's supervisor.

1. You can access schedules in two ways. From the **Manage My Department** main menu, click on the **Schedules** link located in the blue panel located to the right of the CalTime webpage. You also have the option of selecting schedules from the **Timecard** window by clicking on the **Go To** icon.



2. A **Schedules** tab will open for all your employees. You have the option of setting up a schedule for one employee by clicking on the employees name or you can hold down the Ctrl button on your keyboard and click on multiple names at once (this will highlight all the names selected).
3. Make sure you are looking at the correct period of time you would like to assign a schedule for.

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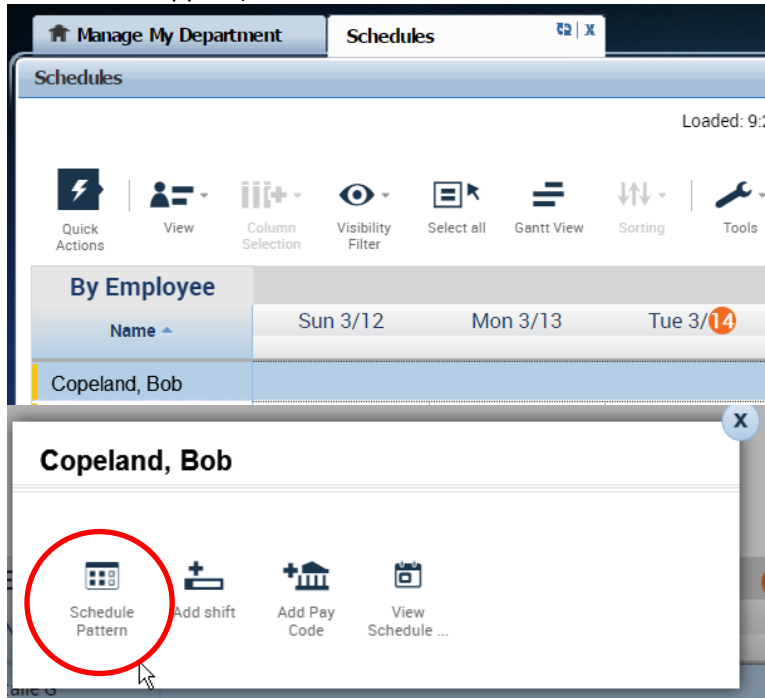
ADDING A SCHEDULE FROM A PRE-DEFINED SHIFT (RECOMMENDED)

There are several ways to add a schedule. Available for your selection are:

Shift templates: list of available start and stop shifts to choose from (i.e. 8a-5p, 9a-6p).

Shift patterns which is a list of available start and stop shifts and days of the week to select from (7a-4p, Mon thru Fri, 9a-6p Tues –Sat)

1. Use your mouse and right click on the employees name and click on Schedule template (a Schedule Pattern window will appear)



2. Click on the applicable days while holding the Ctrl button on your keyboard and click on Shift Template (Note: if you click Pattern templates instead of Shift Template, then you do not need to perform this step of selecting days because a shift pattern will automatically have the days of the week)

The 'Schedule Pattern' configuration window is shown. It includes fields for 'Assigned to' (Primary job: None), a table with columns 'Start Date', 'End Date', 'Duration', and 'Rotation', and an 'Add Pattern' section with 'Anchor Date', 'Start Date', and 'End Date' fields. Below these are radio buttons for 'Forever' and 'Define Pattern for' (Week(s) selected). At the bottom, there are buttons for 'Add Shift', 'Add Pay Code', 'Shift Template' (highlighted in red), and 'Pattern Templ...'. A table at the bottom allows selecting days of the week (Sunday through Saturday) for the pattern, with a 'No.' column and '+'/'x' icons. 'Cancel' and 'Apply' buttons are at the bottom right.

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3. Select pre-defined shift from list of shifts

The screenshot shows the 'Schedule Pattern' form. A red box highlights a dropdown menu that is open, displaying a list of shift templates. A red arrow points to the 'Shift Template' dropdown button. The dropdown menu has a search bar and lists the following items:

Name	Description
08301700 830..	830am - 5pm
08301730 830..	830am - 530pm
09001730 9a...	9am - 530pm
09001800 9a...	9am - 6pm
09151745 915..	915am - 545pm
10001500 10a..	10am - 3pm

The '9am - 6pm' option is currently selected in the dropdown.

4. The schedule will populate (Note: schedule patterns can span several weeks. For example, an employee may work Monday-Friday 8a-5p every other week and Monday-Friday 9a-6p every alternating week. To schedule this, simply add a row by using the Plus sign icon on the day of the week row shows below).

The screenshot shows the 'Schedule Pattern' form with a grid for adding shifts. A red box highlights the grid, which has columns for the days of the week and rows for different shift patterns. The 'Monday' through 'Friday' columns are highlighted in blue, and the '9a-6p' shift pattern is selected for each of these days.

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
+	x	1	9a-6p	9a-6p	9a-6p	9a-6p	9a-6p

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- To erase any future schedules that were already in place, click on the Override other patterns checkbox (you will receive a warning message that you are deleting other schedules). If the schedule pattern is temporary, do not click on the override check box and insert an End Date in the End date field.
- In Start Date field, enter the date that the schedule will begin.
- Click Apply.

Schedule Pattern

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

Assigned to
Primary job None

Start Date	End Date	Duration	Rotation
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Add Pattern

Anchor Date: 3/12/2017 Start Date: 3/12/2017 End Date: Clear

Forever
Week(s) Day(s)

Define Pattern for: 1

Override Other Patterns

Add Shift | Add Pay Code | Shift Template | Pattern Templ... | 9a-6p Find

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		9a-6p	9a-6p	9a-6p	9a-6p	9a-6p	

Cancel Apply

- A window will appear asking you to confirm your changes. Click Yes to proceed

Confirm

Selecting Override may delete shifts or unavailable days, except for locked days or shifts. Do you want to continue?

Cancel Yes

- The results of your schedule will appear. Review your schedule and click ok if accurate. If the results are correct. Click the save icon at the top right. If the results are incorrect, click the X symbol and click refresh at the top right.

Schedule Pattern

Assigned to
Primary job None

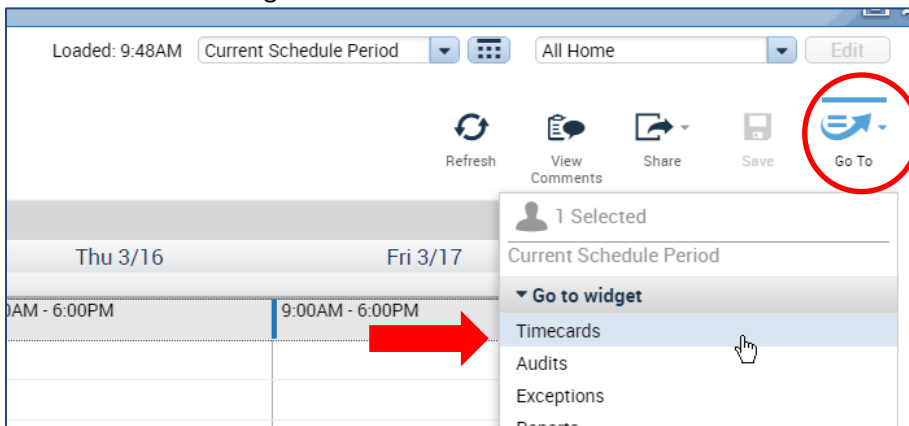
Start Date	End Date	Duration	Rotation
3/12/2017	Forever	1 week	1 Week: 9a - 6p (Mon, Tue, Wed, Thu, Fri)

Add Pattern

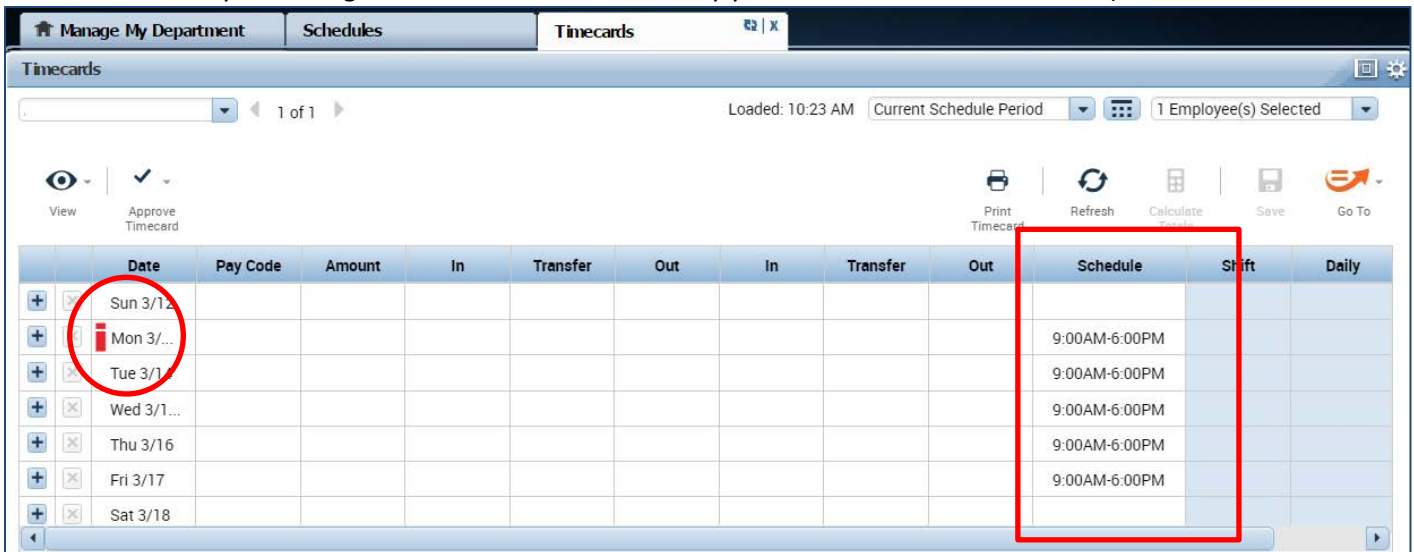
Ok

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10. Click on the Go to Icon to navigate to timecards.



11. View Employees Schedule on the employees timecard (in this example the employee did not punch in at 9am on Monday according to their schedule which is why you see a red mark next to Mon)



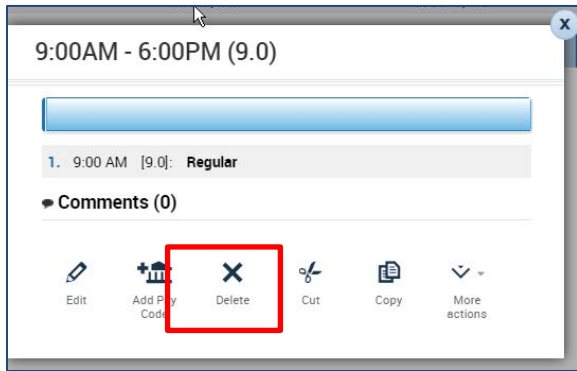
EDIT OR REMOVE A SCHEDULE FROM A PRE-DEFINED SHIFT

Go to the blue pane window at right of your CalTime screen and click on Schedules or you can access schedules from the employee's timecard by clicking on the Go To icon and click on Schedules

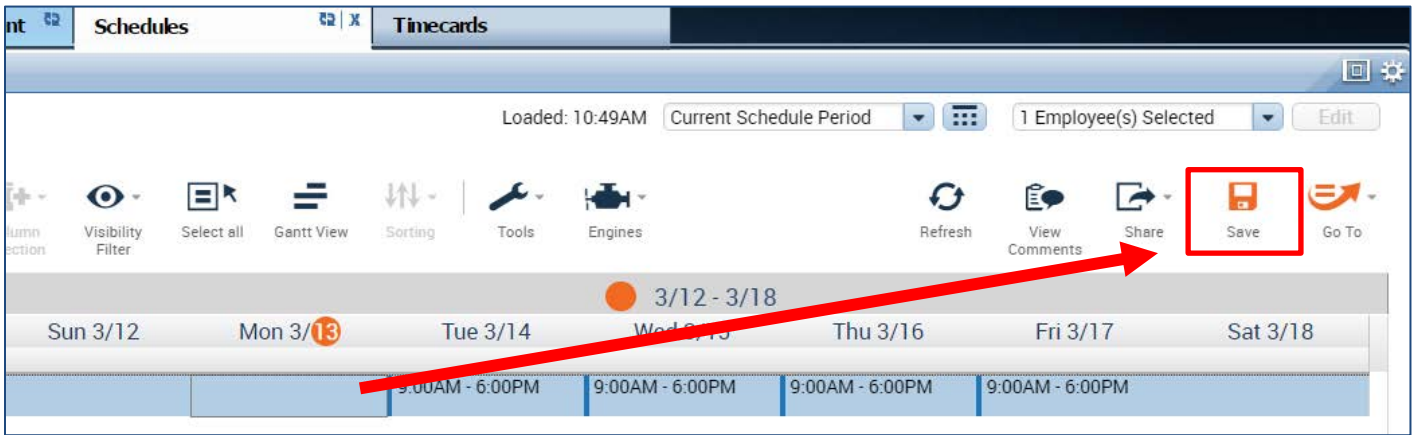
To delete the schedule just for that one day (temporary changing applying to that shift only)

1. Locate employee and right click on schedule under days of the week. Click Delete. This will delete the schedule that one day. You may also click inside the schedule and delete or edit any information in the field by using your Backspace button on your keyboard.

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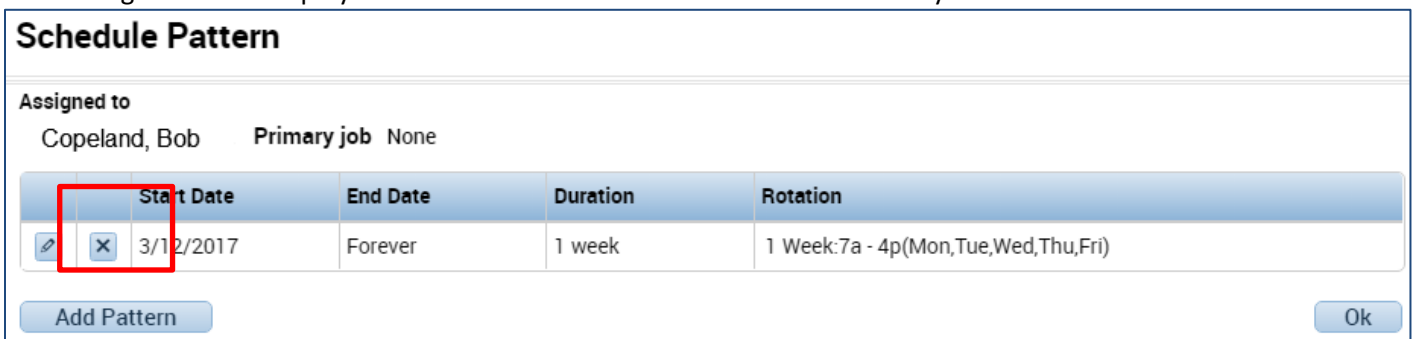


2. Click on Save icon



To delete the schedule completely for all future shifts:

1. Right click on employees name and click on Schedule Pattern. Click X symbol



2. A Confirm message will appear, click yes and Ok (following window), and then Save icon at top right of schedules page.

