

CalTime: How to Add, Edit, and Remove Schedules

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

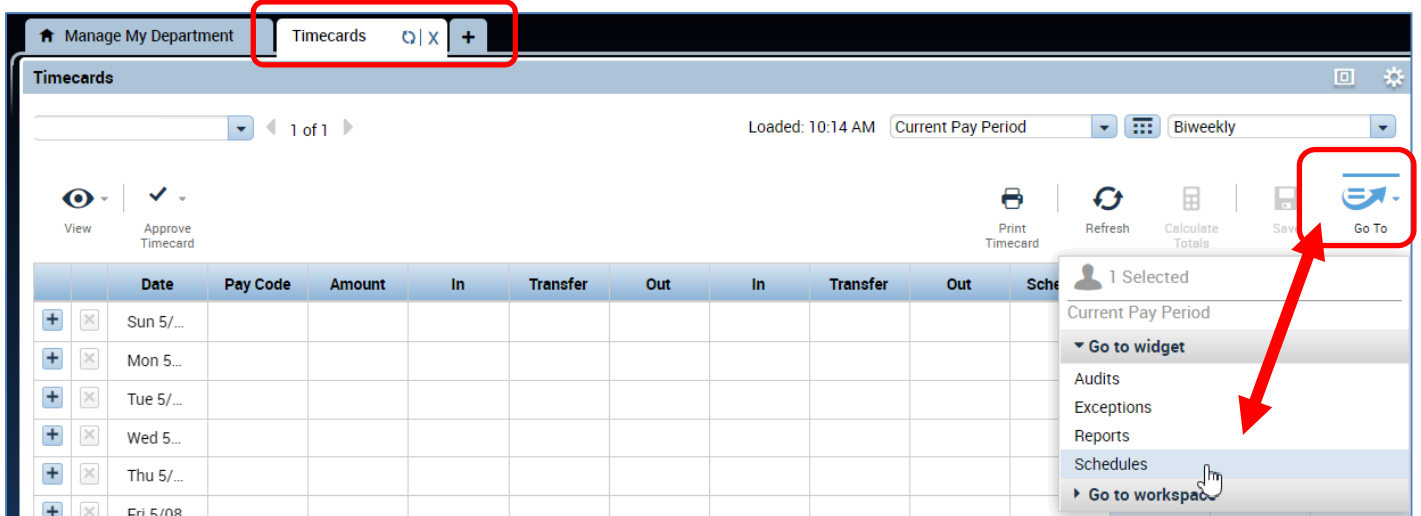
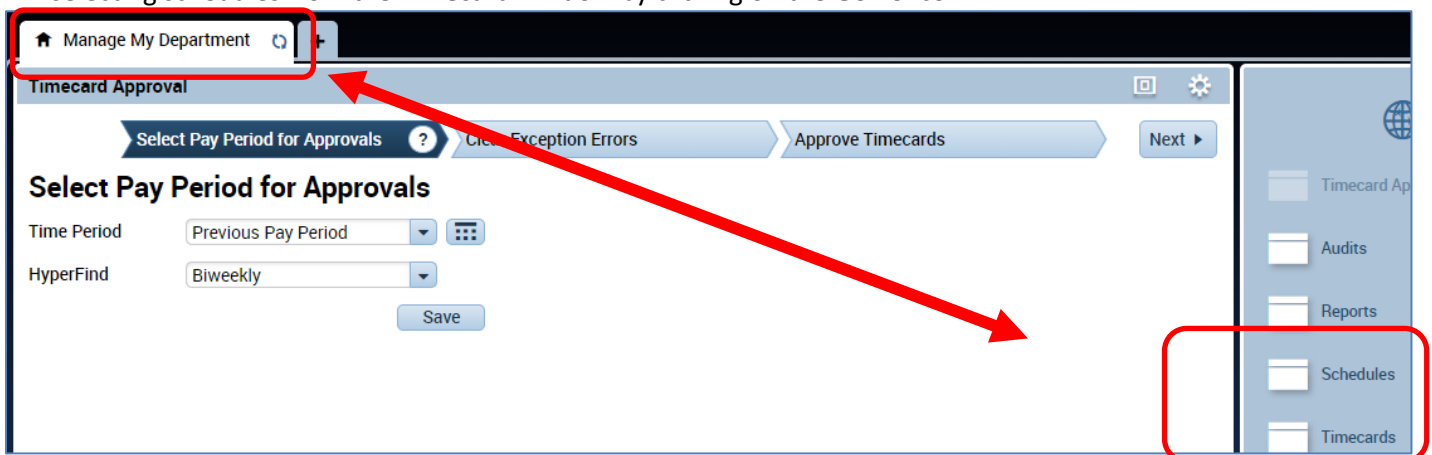
[Adding a Schedule from a Pre-defined Shift \(pg. 2\)](#)

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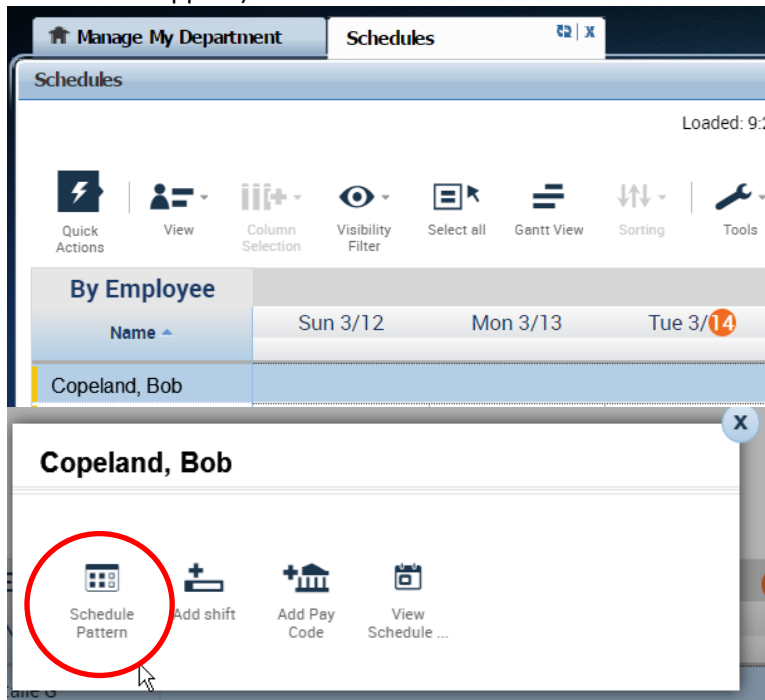
ADDING A SCHEDULE FROM A PRE-DEFINED SHIFT (RECOMMENDED)

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)

Schedule Pattern

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

Define Pattern for: * 1 Week(s) Day(s) Override Other Patterns

Add Shift | Add Pay Code | **Shift Template** | Pattern Templ... | Items in rotation Find

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1							

Cancel Apply

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3. Select pre-defined shift from list of shifts

The screenshot shows the 'Schedule Pattern' form. The 'Assigned to' section shows 'Primary job None'. Below this is a table with columns for 'Start Date', 'End Date', 'Duration', and 'Rotation'. The 'Add Pattern' section includes 'Anchor Date' (3/12/2017), 'Start Date' (3/12/2017), and 'End Date' (empty). There are radio buttons for 'Forever' (selected), 'Week(s)', and 'Day(s)'. A 'Define Pattern for' field has '1' selected. Below this are tabs for 'Add Shift', 'Add Pay Code', 'Shift Template', and 'Pattern Templ...'. The 'Shift Template' dropdown is open, showing a search bar and a list of shifts with columns for 'Name' and 'Description'. A red box highlights the dropdown menu, and a red arrow points to the search bar. The list includes shifts like '08301700 830.. 830am - 5pm', '08301730 830.. 830am - 530pm', '09001730 9a... 9am - 530pm', '09001800 9a... 9am - 6pm', '09151745 915.. 915am - 545pm', and '10001500 10a.. 10am - 3pm'. A '9am - 6pm' dropdown is visible at the bottom of the list.

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. The 'Assigned to' section shows 'Primary job None'. Below this is a table with columns for 'Start Date', 'End Date', 'Duration', and 'Rotation'. The 'Add Pattern' section includes 'Anchor Date' (3/12/2017), 'Start Date' (3/12/2017), and 'End Date' (empty). There are radio buttons for 'Forever' (selected), 'Week(s)', and 'Day(s)'. A 'Define Pattern for' field has '1' selected. Below this are tabs for 'Add Shift', 'Add Pay Code', 'Shift Template', and 'Pattern Templ...'. The 'Add Shift' button is highlighted. The 'Shift Template' dropdown is open, showing a search bar and a list of shifts with columns for 'Name' and 'Description'. A red box highlights the dropdown menu, and a red arrow points to the search bar. The list includes shifts like '08301700 830.. 830am - 5pm', '08301730 830.. 830am - 530pm', '09001730 9a... 9am - 530pm', '09001800 9a... 9am - 6pm', '09151745 915.. 915am - 545pm', and '10001500 10a.. 10am - 3pm'. A '9am - 6pm' dropdown is visible at the bottom of the list.

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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

Add Pattern

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

Forever Override Other Patterns

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

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

	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
+ x	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

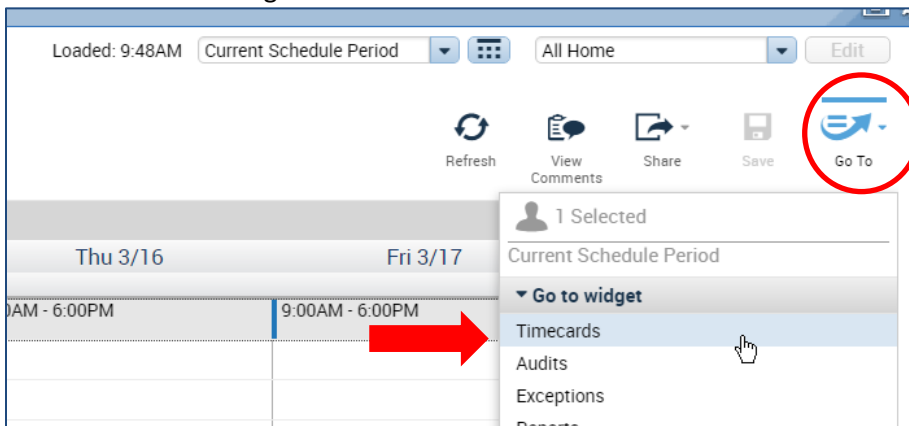
Assigned to
Primary job None

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

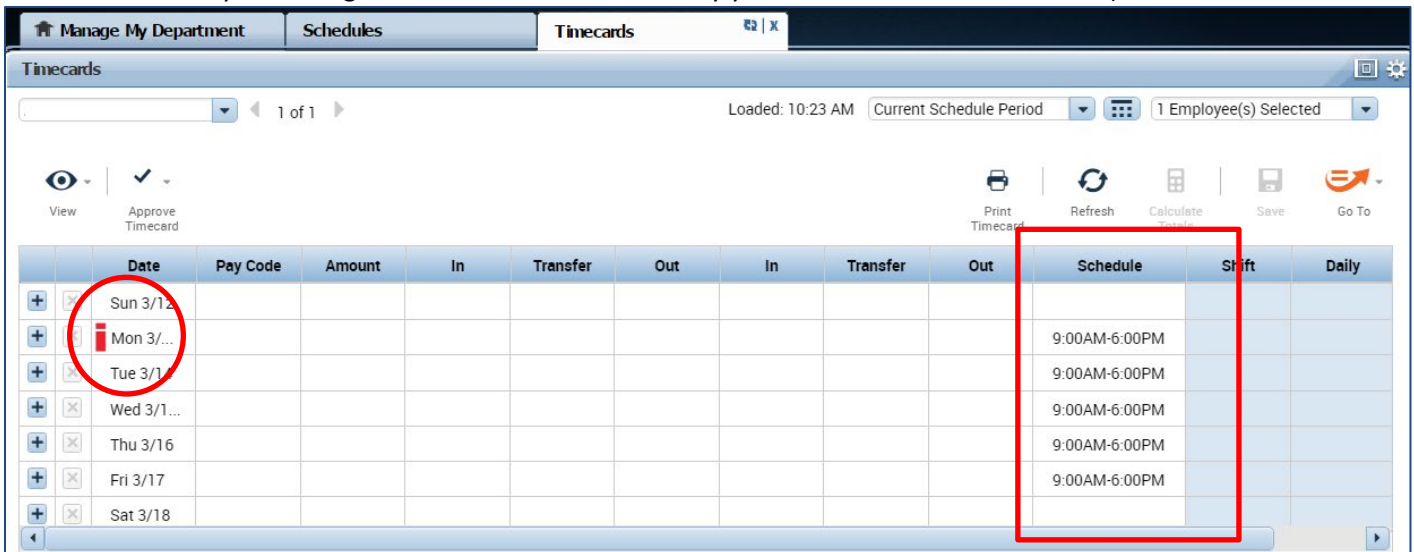
Add Pattern Ok

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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)



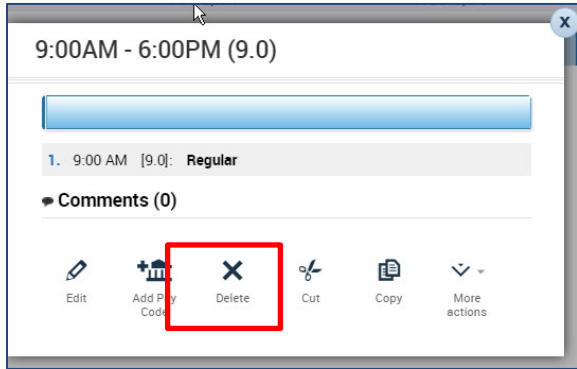
EDIT OR REMOVE A SCHEDULE FROM A PRE-DEFINED SHIFT

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

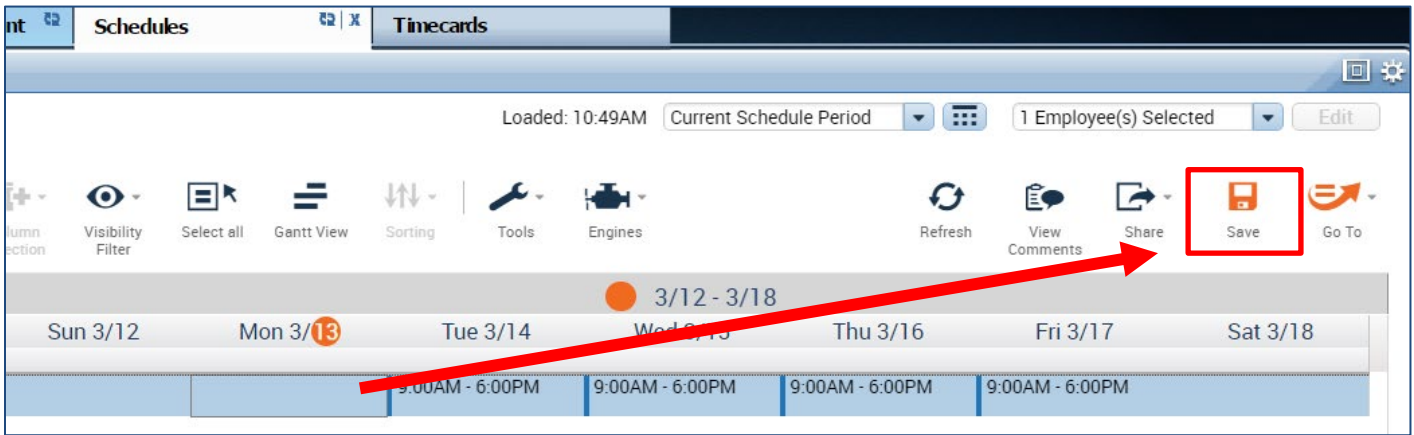
To delete the schedule just for that one day (temporary changing applying to that shift only)

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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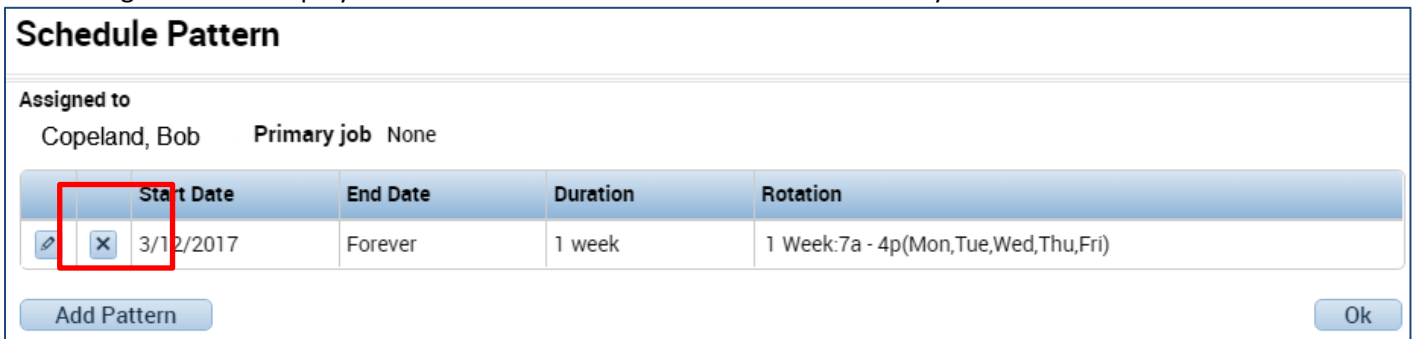


2. Click on Save icon



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.

