CalTime: How to Add, Edit, and Remove Schedules

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. From the **Manage My Department** main menu, click on the applicable employee. Then click on the **Go To** Icon and select **Schedules**. You also have the option of selecting schedules from the **Timecard** window by clicking on the **Go To** Icon.
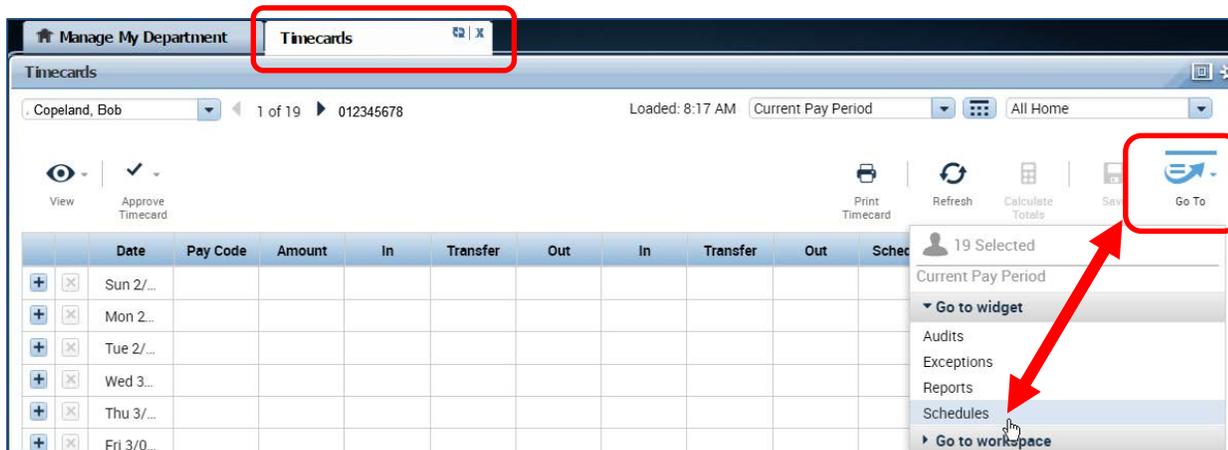
2. A **Schedules** tab will open for all employees. You have the option of setting up a schedule for one employee by clicking on the employees name or you can hold down the Ctrl button on your keyboard and click on multiple names at once (this will highlight all the names selected).
3. Make sure you are looking at the correct period of time you would like to assign a schedule for.

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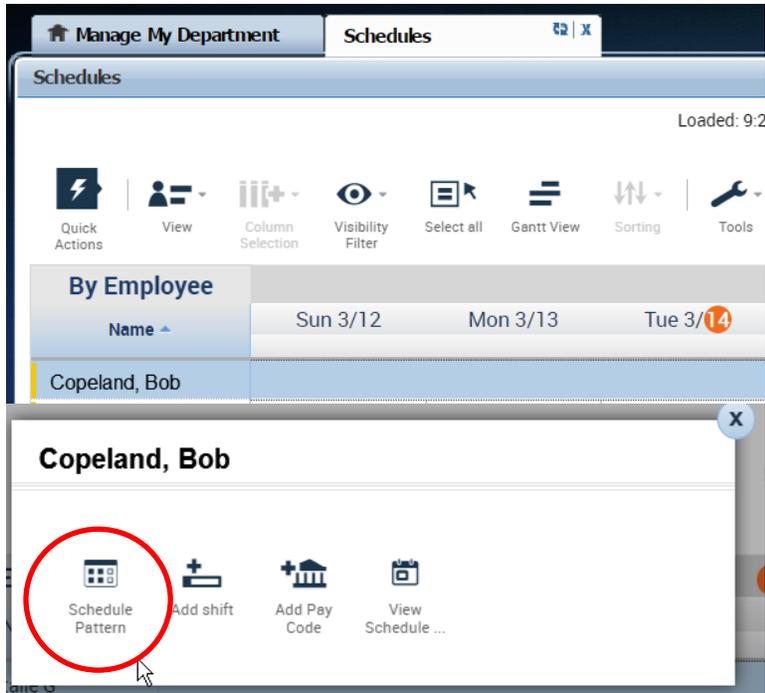
2. Click on the applicable days while holding the Ctrl button on your keyboard and click on Shift Template (Note: if you click Pattern templates instead of Shift Template, then you do not need to perform this step of selecting days because a shift pattern will automatically have the days of the week)

3. Select pre-defined shift from list of shifts

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).

5. 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 and End Date in the End date field.
6. In Start Date field, enter the date that the schedule will begin.
7. Click Apply.

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

9. 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.

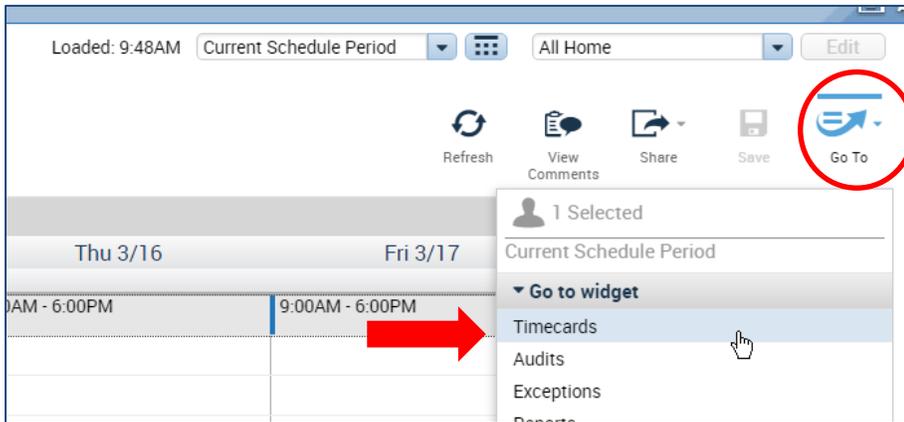10. Click on the Go to Icon to navigate to timecards.

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)
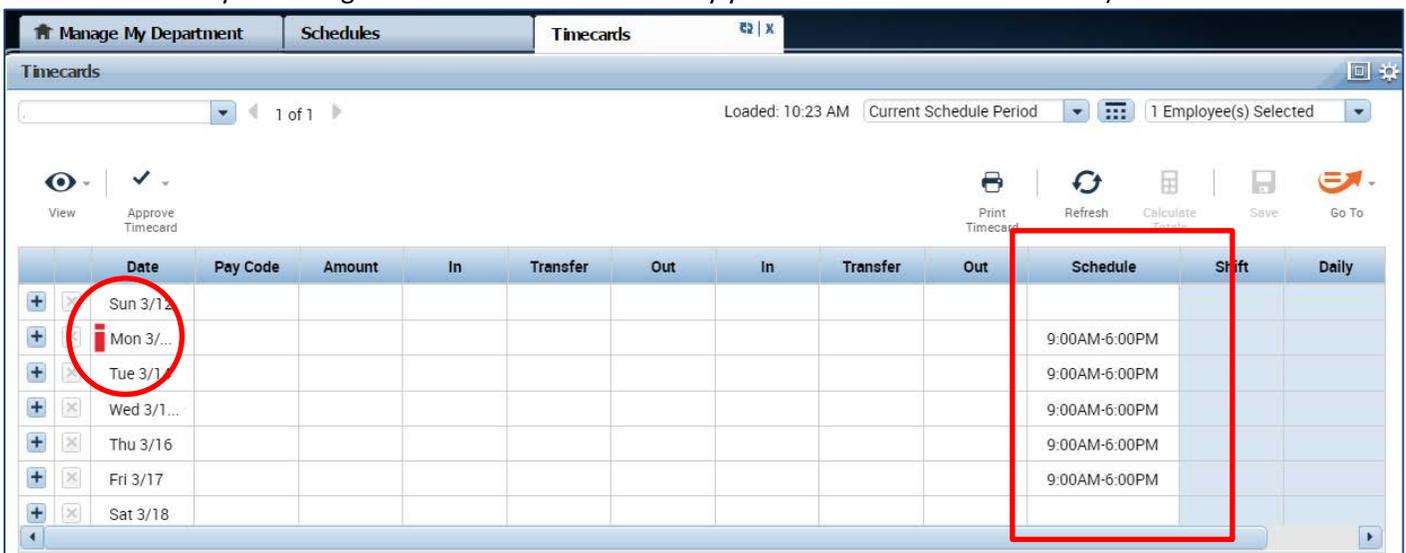

EDIT OR REMOVE A SCHEDULE FROM A PRE-DEFINED SHIFT

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.
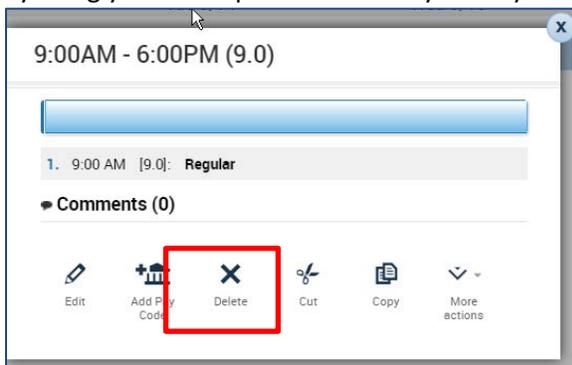
2. Click on Save icon

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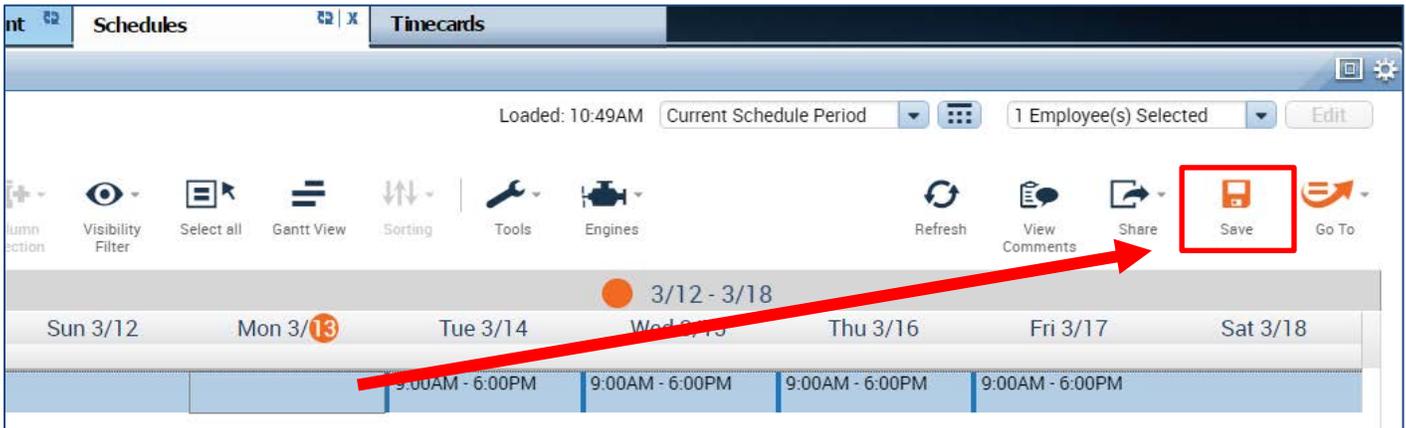
To delete the schedule completely for all future shifts:

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.