Creating a New Schedule Template

A schedule template is a predictable, repeating, weekly or multi-week schedule that you can use to quickly assign employees to common schedules. At a minimum, a schedule template defines employee in and out times for each day during the schedule. A schedule template can also specify a pay code, lunch plan, shift rule, and up to two labor charge category values for each regularly scheduled time pair in the template.

People > Time & Attendance > Schedule Templates

1 Click Create New.

2 In the Name field, enter a short name for the new schedule template.

3 In the Description field, enter a description of the new schedule template.

4 In the Effective Date field, enter the first day of the current pay period.

5 In the Status field, select the appropriate option. The default status is Active. To make the schedule template inactive, select Inactive.

6 In the Access field, select the appropriate option. The default access is Private.

7 In the Week grid, click the day of the week cells you want to add the shift to.

8 In one of the selected cells, click the Plus (+) icon.

9 In the Add Shift panel, in the Start Time and End Time fields, enter the appropriate times.

10 Complete additional fields, as needed. Department, Job, Shift Rule, and Flextime Rule fields will display, if configured for your company.

11 Click Save. The Week #: Total field is updated to reflect the week number and total number of hours.

12 To add an additional week to the template, click the Row Menu button.

13 Select Add New Row Above or Add New Row Below to add a second week. If you select Add New Row Above, the week number for the first week is changed to 2.

14 Repeat the steps starting with Step 7.

15 Click Save Template.