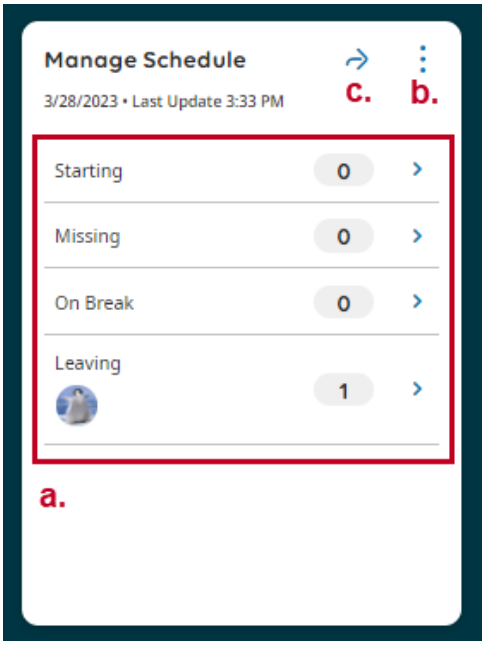
UKG – Manage Schedules and Schedule Patterns Quick Reference Guide

This document covers how a to use the **Manage Schedule** tile in UKG to view associate schedules, edit, and update schedules as well as create schedule patterns to allow you to quickly fill out schedules for individuals and groups of associates simultaneously.

Scheduling Overview

Manage Schedule Tile – The Manage Schedule tile is a quick view to employees' schedules. You can also access the complete schedule by clicking the **Full Schedule arrow** at the top of the **Manage Schedule** tile.

From the **Workforce Management Home Page**, locate the **Manage Schedule Tile** for a quick view of the number of associates



a. **Quick View Categories –** Click any of the categories on the tile to view additional information
   i. **Starting** = scheduled to start their shift soon (within 30 min)
   ii. **Missing** = scheduled to start recently but did not punch in
   iii. **On Break** = taking a scheduled break
   iv. **Leaving** = scheduled to leave soon (within 30 min)

b. **Refresh** – Update the **Manage Schedule** tile view by accessing the three dots in the upper right of the tile and selecting the Refresh option

c. **Full Schedule** – Access the full schedule and capabilities by clicking the arrow at the top of the tile

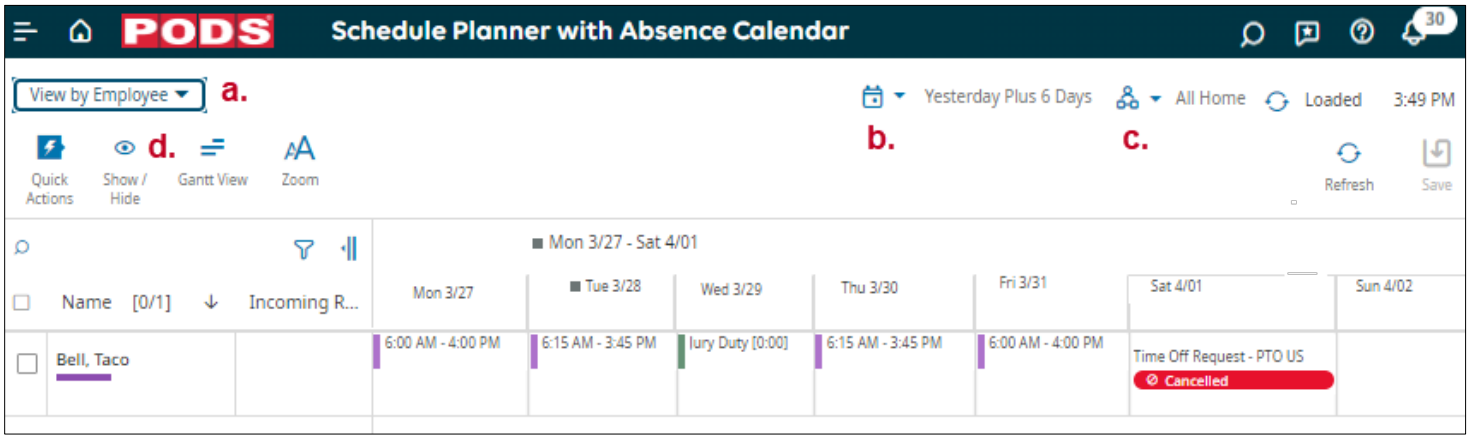
Schedule View Navigation – Use the available filters on the **Schedule Planner** page to narrow the amount of information viewable.

a. **View By** – Select Employee, Job, Schedule Group, or Employment Terms

b. **Timeframe** – Select the schedule periods from the dropdown or input a date range

c. **Hyperfind –** Search by location (i.e. Corp Ops Elgin, IL) defined group (i.e. All SSC employees)

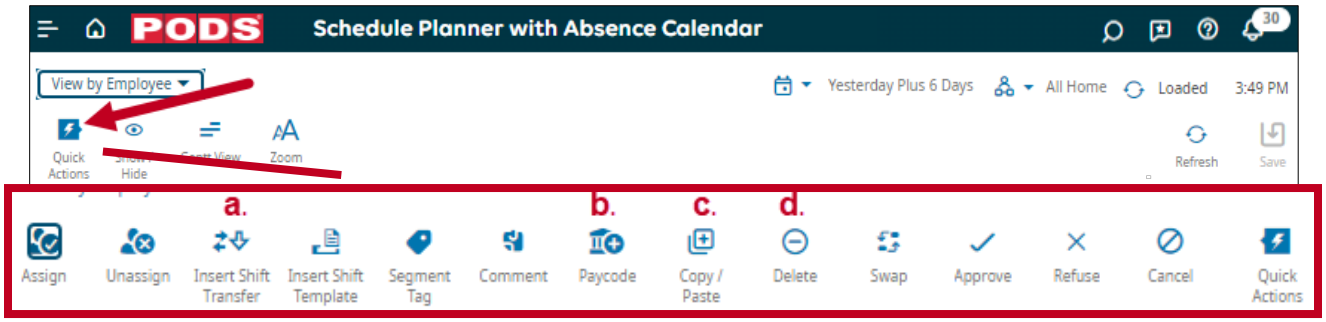
d. **Show/Hide –** Open the Show/Hide panel to select/deselect and apply categories and display options like Availability, Shift Display, Paycode Display, Time-off Request



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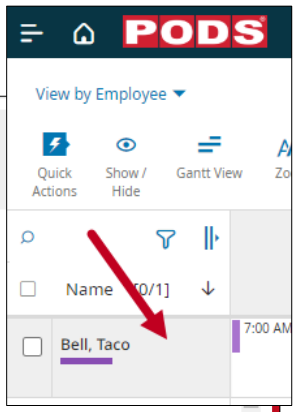
Schedule Quick Actions – Click the Quick Actions menu to view and use all available options from the Schedule Planner view. The most commonly used actions are

a. **Insert Shift Transfer –** Indicate a change in the associatie job, location, or labor category for a specific shift or partial shift
b. **Paycode –** Replace an assigned shift with a paycode
c. **Copy/Paste –** Copy and Paste a shift to associates with the same assigned role
d. **Delete –** Delete a shift , paycode or accrual

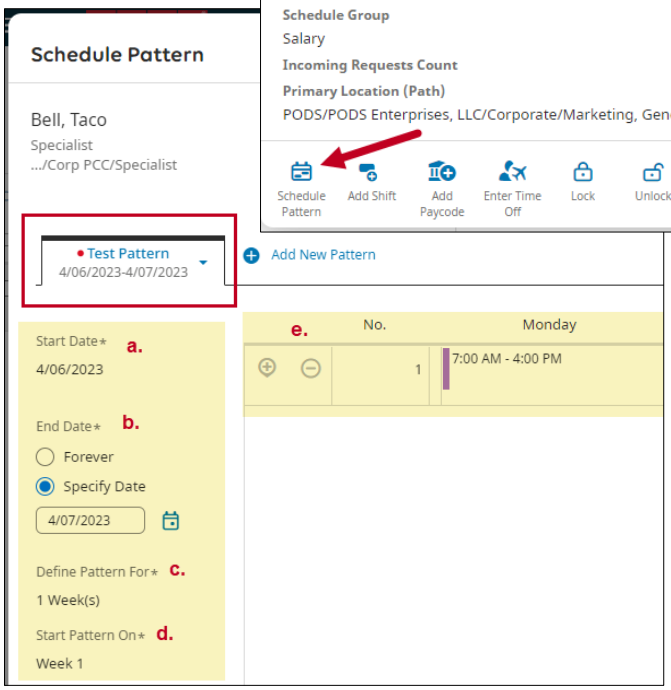


Schedule Patterns

View existing Schedule Pattern – From the Schedule Pattern screen you can navigate to any previously created schedules by clicking on the tabs across the top.



1. On the **Workforce Management Homepage**, click the **Full Schedule arrow** on the **Manage Schedule tile** to open the **Schedule Planner with Absence Calendar**
2. **Right click** an **associate name** to select and open the associate summary box
3. **Click** the **Schedule Pattern icon** to open the **Schedule Pattern** screen
4. **Click** the tab for **the pattern** you want to view to see pattern info
   a. **Start date** = date the pattern is effective
   b. **End Date** =
      i. Forever
      ii. Specify date: select date to end
   c. **Define Pattern** = # of weeks or days the pattern is effective
   d. **Start Pattern On** = the week you want the pattern to start



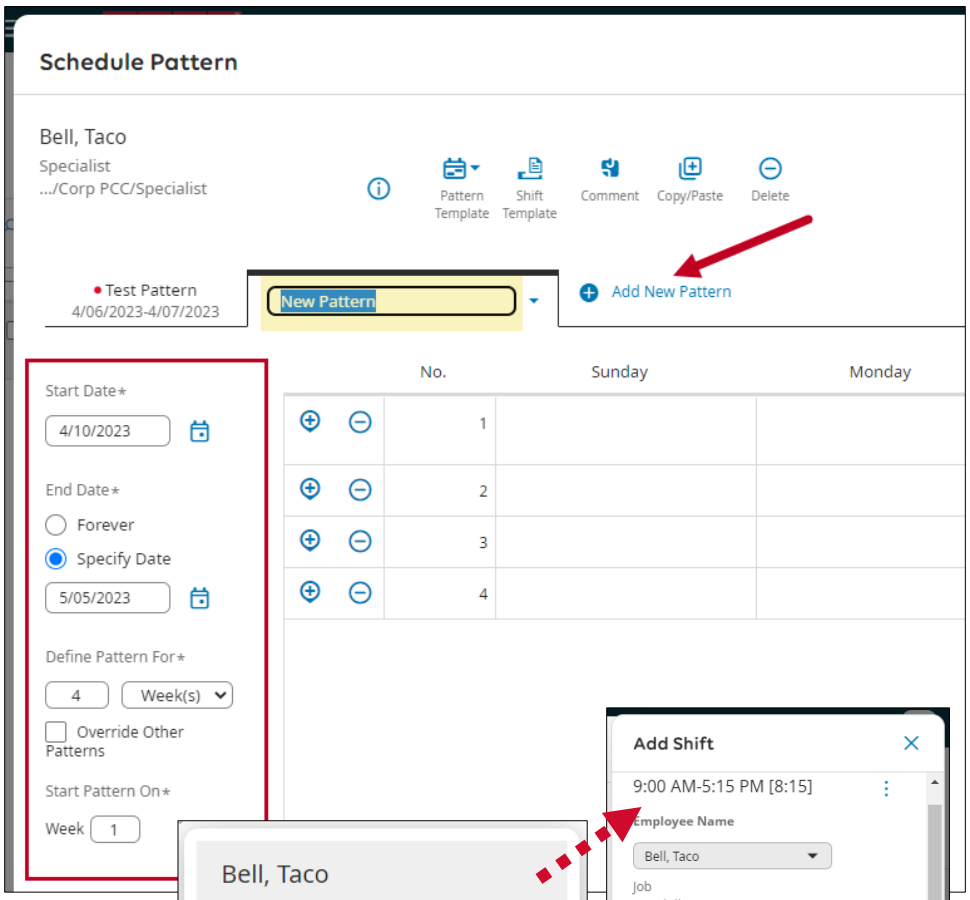
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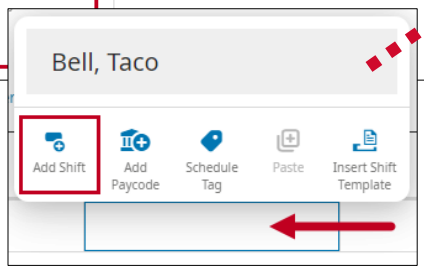
Create a New Schedule Pattern – Once a schedule pattern has been defined, it can be saved as a schedule template and used for any associate or group.

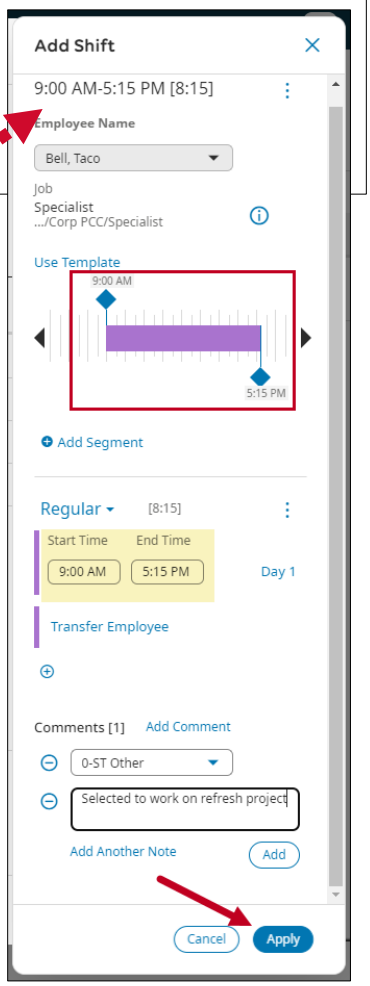
1. **Right click** an **associate name** to select and open the associate summary box
2. **Click** the **Schedule Pattern icon** to open the **Schedule Pattern** screen
3. **Click New Pattern** and **input** the **name** you would like to give the pattern
4. **Complete** the **required fields** to define the pattern info (Start Date, End Date, etc.)

NOTE: Checking the Override Other Patterns box will overwrite any previously applied schedule patterns and paycodes.

5. **Right click** any **cell** in the schedule to open the **Shift glance** box
6. **Click** the **Add Shift icon** to open the **Add Shift panel**
7. **Use the sliders** to adjust the **start and end times** of the shift **OR input** the **Start and End time** in the boxes below the slider
8. **Click Apply** to add the shift to the schedule
9. **Repeat the process** for all other cells in the schedule **OR right click** the **completed cell** and use the **Copy/Paste** function to apply the same shift to the **desired cells**
10. **Click Apply** at the bottom of the **Schedule screen** to add the pattern to the associate's schedule
11. **Click Save** on the **Schedule Planner screen** to save changes to the schedule







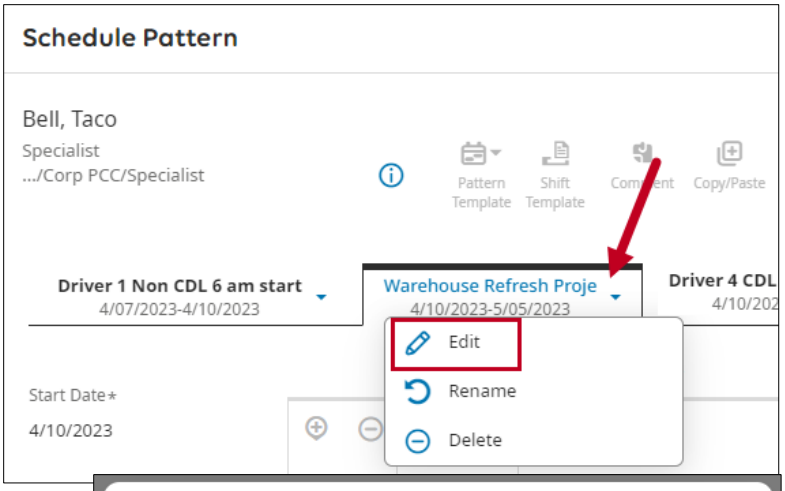
Tips:

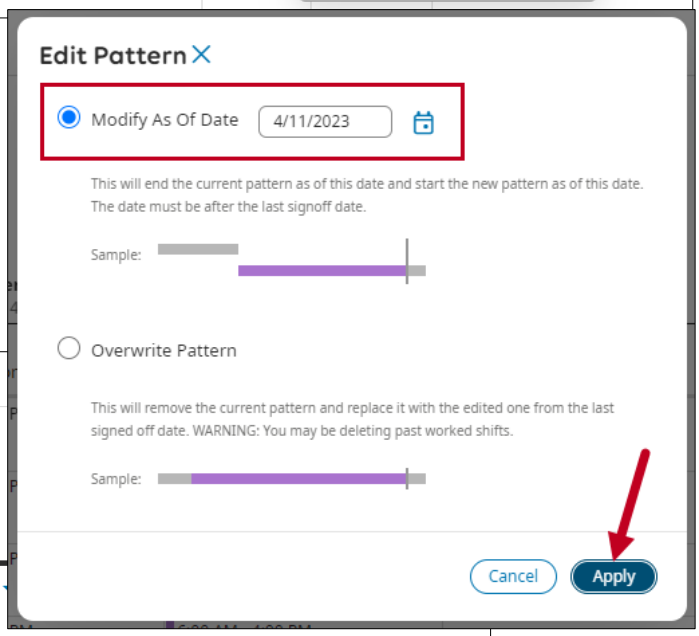
- *Create schedule patterns for multiple associates by selecting the tick box next to each name*
- *Left click any cell in schedule pattern to directly type in shift times*
- *Leave the **Override Other Patterns** box unchecked to add the additional shift to same day of the schedule*
- *Use the Delete icon to remove shifts from a pattern*

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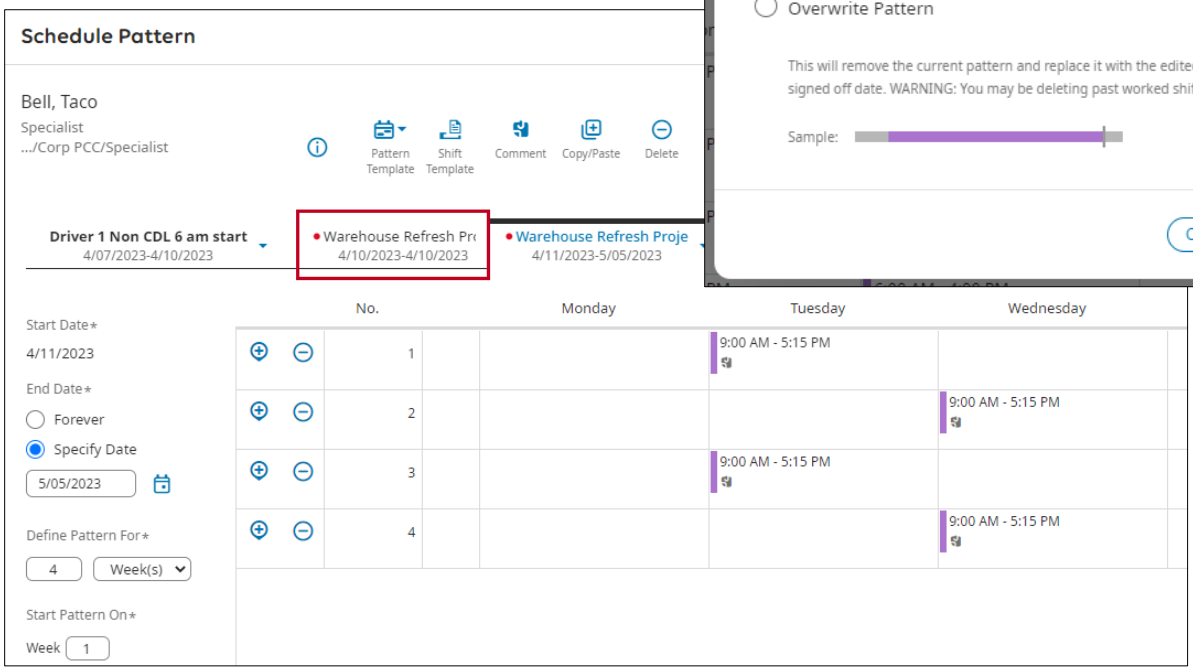
Edit an Existing Schedule Pattern – You can modify existing patterns that have been applied to associate schedules from the **Schedule Pattern screen**.

1. From the **Schedule Pattern screen, click** the **arrow** next to the schedule pattern name you want to edit
2. **Select Edit** from the dropdown menu to display the **Edit Pattern dialog box**
3. **Input** the **Modify as of Date** to define the date the edited pattern will begin (dates cannot be past dates) then **click Apply** to open the schedule pattern for editing
4. **Complete** schedule pattern **edits** as needed and **click Apply** at the bottom of the **Schedule screen** to add the pattern to the associate's schedule
5. **Click Save** on the **Schedule Planner screen** to save changes to the schedule





*Tip: The original schedule will automatically show an end date based on the **Modify As of Date** entered and the editable pattern will show in a separate tab.*

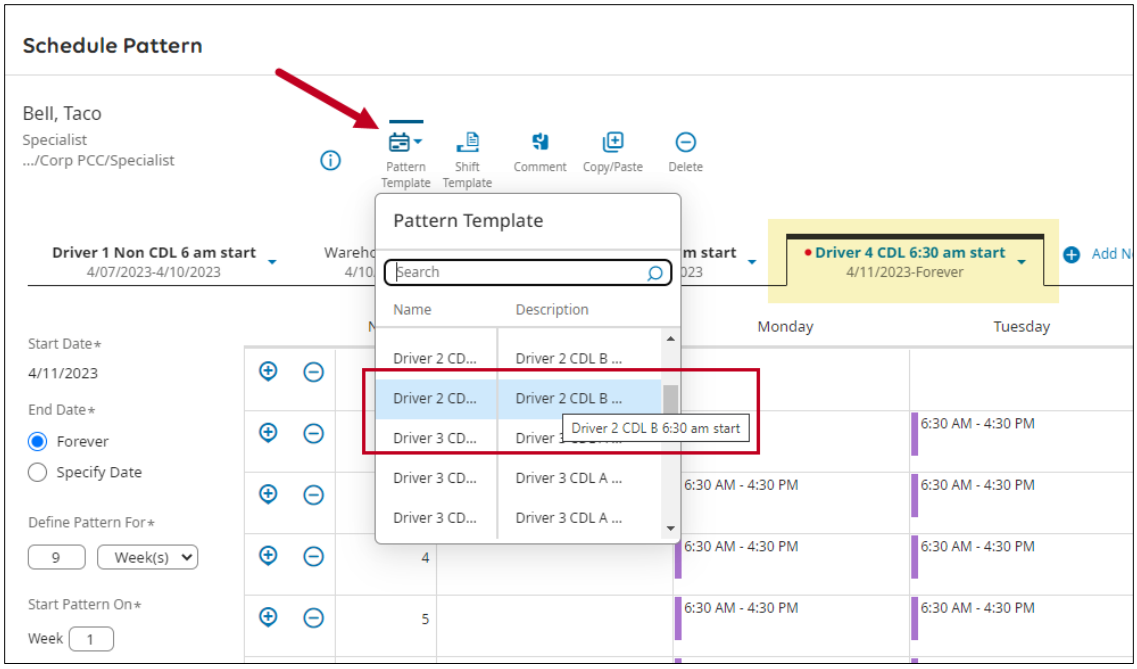


Important *Patterns with past end dates cannot be modified or deleted. To avoid deleting past worked shifts, **do not select Overwrite Pattern** on the **Edit Pattern dialog box**.*

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Use a Schedule Pattern Template – Pattern templates are preset schedules created by PODS UKG admins to reflect the most common schedule patterns for drivers, storage center workers, and other hourly associates that work core business hours.

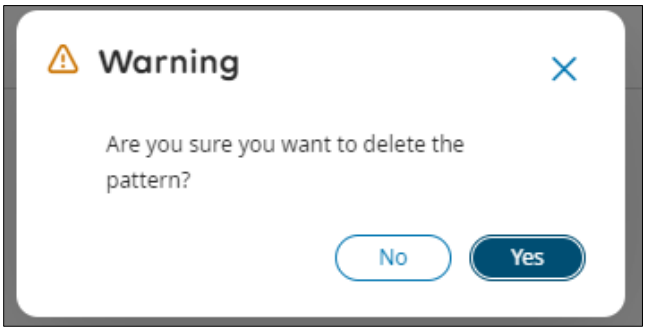
1. From the **Schedule Pattern** screen **select Add New Pattern** or **edit** a future dated **existing pattern**
2. **Click** the **Pattern Template icon** to open the dropdown menu
3. **Select** the desired **Pattern Template** or **input template name** in the **Search field** to apply the pattern
4. **Click Apply** at the bottom of the **Schedule screen** to add the pattern to the associate's schedule
5. **Click Save** on the **Schedule Planner screen** to save changes to the schedule



Delete Schedule Patterns – You can delete schedule patterns that have not been worked (future dates).

1. From the **Schedule Pattern screen, click** the **arrow** next to the schedule pattern name you want to delete
2. **Select Delete** from the dropdown menu to display one of the two **Warning dialog box(s)**

Warning for future dated schedule:
Click Yes to confirm or click No to return to the schedule pattern without deleting



Warning for worked schedule:
Input end date and click Yes or click No to return to the schedule pattern without deleting

