



Creating a Basic Shift

To create a basic schedule, the steps you must complete in this order are:

- 1) Create a Shift.
- 2) Assign the Shift (or shifts) to a Shift Pattern.
- 3) Go to the Timesheet for the employee you wish to assign the shift pattern to.
- 4) Click the employee's name to open the Employee Override page.
- 5) Assign the new shift pattern to the employee.

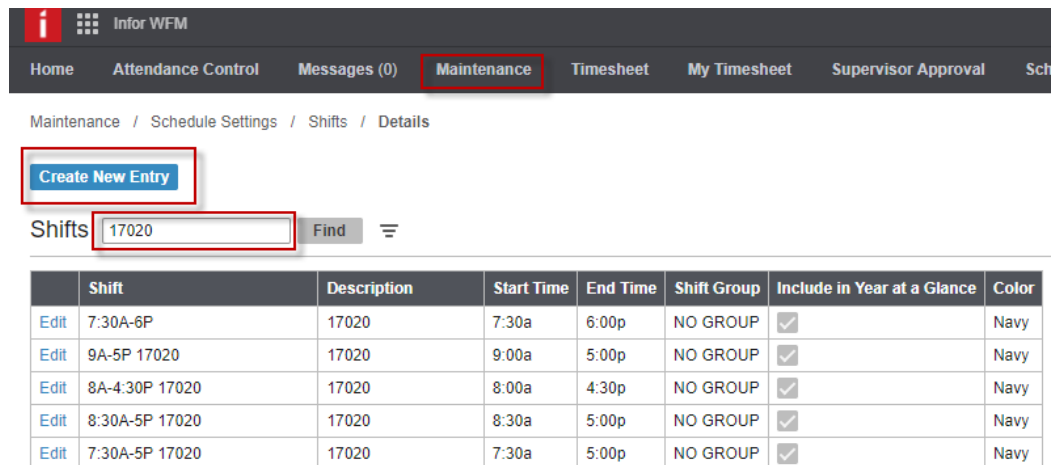
Creating a New Shift

To create a new shift label for use in assigning to a shift pattern:

1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in.
3. Click on **Maintenance**.
4. Click **Schedule Settings**.
5. Click **Shifts**.

a. Tip: You can use shifts created by another department/leader visible in your screen.

b. Or, search the Description or Shift name by your department name or cost center number to locate previously created



The screenshot shows the Infor WFM Maintenance interface. The navigation menu includes Home, Attendance Control, Messages (0), Maintenance (highlighted), Timesheet, My Timesheet, Supervisor Approval, and Schedules. The breadcrumb trail is Maintenance / Schedule Settings / Shifts / Details. A 'Create New Entry' button is visible. Below it, a search bar for 'Shifts' contains the value '17020' and a 'Find' button. The search results are displayed in a table with the following data:

	Shift	Description	Start Time	End Time	Shift Group	Include in Year at a Glance	Color
Edit	7:30A-6P	17020	7:30a	6:00p	NO GROUP	<input checked="" type="checkbox"/>	Navy
Edit	9A-5P 17020	17020	9:00a	5:00p	NO GROUP	<input checked="" type="checkbox"/>	Navy
Edit	8A-4:30P 17020	17020	8:00a	4:30p	NO GROUP	<input checked="" type="checkbox"/>	Navy
Edit	8:30A-5P 17020	17020	8:30a	5:00p	NO GROUP	<input checked="" type="checkbox"/>	Navy
Edit	7:30A-5P 17020	17020	7:30a	5:00p	NO GROUP	<input checked="" type="checkbox"/>	Navy

shifts as shown in the example below where 17020 is being searched for by typing in the number and clicking **Find**. Do NOT Edit other departments' shifts.

6. Click **Create New Entry** to create a new shift (sample of what right looks like is on the next page). Any field with an *asterisk is required. Complete the fields as follows:
 - a. **Shift**: This shift name must be unique. Add the cost center name or employee name to this unique shift in order to locate it later to assign it to a shift pattern.
 - b. **Shift Group**: No Group.

- c. **Description:** Type your department cost center number. This will allow you to quickly search for your own shifts in the future associated with your own department and edit/change as needed.
 - d. **Include in Year at a Glance:** Checkmark the box—this allows you to use the Year at a Glance reports under My Reports for this shift.
 - e. **Start Time:** Make sure to specify AM or PM correctly.
 - f. **Color:** Choose a dark color so you and the employees can read it on the schedule.
 - g. **End Time:** Make sure to specify AM or PM correctly.
 - h. Click **SAVE**.
7. **Shift Break:** Add this section **ONLY** if your shift is 6.5 hours or greater whether a salaried or hourly staff member. This allows you to build in the planned 30 minute unpaid meal break as part of the shift. If the shift is less than 6 hours, do **NOT** complete this step.
- a. **Start Time:** Choose AM or PM. If the employee does not take the break at this time, there is no issue. This is a planned placeholder on the schedule.
 - b. **End Time:** Choose AM or PM. If the employee does not take the break at this time, there is no issue. This is a planned placeholder on the schedule. It must be 30 minutes after the Start Time you entered above.
 - c. **Duration:** 30
 - d. **Time Code:** Meal
 - e. **Hour Type:** Unpaid.
 - f. **Default Start:** Mirror what you entered in the Start Time.
 - g. Click **Save**.
8. Be sure to remember your exact shift name or write it down here: _____.
You will need to know it **EXACTLY** for creating your shift pattern in the next step.

[Create New Entry](#)

Shifts - Details ...

Del

Shift * Shift Group *

Description * Include in Year at a Glance

Start Time * Color

End Time *

[Save](#) [Return to form listing](#)

Shift Break

Del	Start *	End *	Duration *	Time Code *	Hour Type *	Default Start (HH:MM)
<input type="checkbox"/>	<input type="text" value="12:00p"/>	<input type="text" value="12:30p"/>	<input type="text" value="30"/>	<input type="text" value="MEAL"/> <input type="button" value="Q"/>	<input type="text" value="UNPAID"/> <input type="button" value="Q"/>	<input type="text" value="12:00p"/>

[Save](#) [Return to form listing](#) [Top](#)

Creating a Shift Pattern


To create a new shift pattern that repeats every 7 days, 14 days or 21 days, follow these steps:

1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in.
3. Click on **Maintenance**.
4. Click **Schedule Settings**.
5. Click **Shift Pattern**.
6. Type in the search box (see example to the right) your cost center number, department name, or another key word to search for a previously created shift pattern for your department. Click **Find**. Or, click on **Create New Entry** to create a new shift pattern for use in your department.

The screenshot shows the Infor WFM Maintenance interface. The breadcrumb trail is: Maintenance / Schedule Settings / Shift Pattern / Details. A 'Create New Entry' button is highlighted with a red box. Below it is a search box for 'Shift Pattern' with the value '17020' entered, and a 'Find' button. A table lists existing shift patterns:

	Shift Pattern	Description	Start Date	Day Start	Shift Group
Edit	7A-3:30P 17020	17020	07/28/2019		NO GROUP
Edit	7:30A-5P 17020	17020	08/04/2019		NO GROUP
Edit	8:30A-5P 17020	17020	07/28/2019		NO GROUP
Edit	7A - 5:30P 17020	17020	07/28/2019		NO GROUP
Edit	8A - 4:30P 17020	17020	07/28/2019		NO GROUP

- a. Reminder: Do NOT edit other departments' shift patterns.
7. To create a new shift pattern for 7 days (Sunday through Saturday), follow these steps:
 - a. **Shift Pattern:** Type the name of the shift pattern. This must be unique and you will need to remember it to assign it to the employee in the future.
 - b. **Description:** Type your department's cost center number this pattern will be used with so you can locate it for easily for future use.
 - c. **Start Date:** Date you want to make this shift pattern available for use (always pick a Sunday date).
 - d. **Day Start:** leave blank.
 - e. **Shift Group:** No Group.
 - f. Click **Save**.

8. Create the **Shift Pattern** Shifts next to associate the shift(s) with each day—one shift per day (example shown to the right). Click the plus sign  seven times to create a one week pattern, click the plus sign fourteen times to create a two week pattern, etc. You have a limit of a 21 day pattern.

9.
 - a. In Day, make the first row: 1 (representing Sunday and the first day

The screenshot shows the 'Shift Pattern Shifts' table. It has a search box and a 'Find' button. The table columns are Del, Day, Shift, and UDF 1. The rows are numbered 1 through 7. Row 1 is OFF, and rows 2 through 6 are 7A-3:30P 17020. Row 7 is OFF. A 'Save' button and a plus sign icon are highlighted with red boxes.

Del	Day	Shift	UDF 1
<input type="checkbox"/>	1	OFF	
<input type="checkbox"/>	2	7A-3:30P 17020	
<input type="checkbox"/>	3	7A-3:30P 17020	
<input type="checkbox"/>	4	7A-3:30P 17020	
<input type="checkbox"/>	5	7A-3:30P 17020	
<input type="checkbox"/>	6	7A-3:30P 17020	
<input type="checkbox"/>	7	OFF	

of the work week); 2 (representing Monday and the 2nd day of the workweek), 3 (representing Tuesday and 3rd day of the workweek) and so forth. Day 7= Saturday. See the screenshot below for a Monday thru Friday shift pattern where the employee works the same hours each day and is off on Saturday and Sunday of each week.

- b. Shift: For each row, choose 'OFF' if this employee does not work this day of the week or choose the SHIFT NAME you created earlier for each day the employee does work.
 - i. Tip: An employee can have more than one shift assigned in their repeating pattern. Refer to the second screenshot on the next page for an example.
 1. As a reminder: staff must have 8 hrs rest between midnight and midnight of the same work day, and may only work 16 hours per day, up to six days between Sunday and Saturday of the same calendar week by law in Illinois.

c. Click **Save**.

The screenshot displays the Infor WFM interface for configuring a shift pattern. At the top, there is a navigation bar with options like Home, Attendance Control, Messages (0), Maintenance, Timesheet, My Timesheet, Supervisor Approval, Scheduling, My Reports, and Team. Below this, a breadcrumb trail shows 'Maintenance / Schedule Settings / Shift Pattern / Details'. A 'Create New Entry' button is visible. The main section is titled 'Shift Pattern - Details ...' and contains a form with the following fields: Del (checkbox), Shift Pattern * (7A-3:30P 17020), Description (17020), Start Date * (07/28/2019), Day Start, and Shift Group * (NO GROUP). A 'Save' button and a 'Return to form listing' link are present. Below this is a 'Shift Pattern Shifts' section with a search bar and a 'Find' button. It contains a table with 7 rows for days of the week. The first and last rows are set to 'OFF', while rows 2 through 6 are set to '7A-3:30P 17020'. Each row has a 'Del' checkbox and a search icon. Below the table is another 'Save' button and a 'Return to form listing' link. The final section is 'Shift Pattern Shift Labor' with a search bar and a 'Find' button. It shows a table header with columns: Shift Pattern Shifts, Shift Pattern, Start Time, End Time, Docket, Hour Type, Job, Time Code, Project, Cost Center Override, Activity, and Team. Below the header, it states 'No Records Found'. At the bottom, there is a 'Save' button and a 'Return to form listing' link.

Create New Entry

Shift Pattern - Details ...

Del	Shift Pattern *	Description	Start Date *	Day Start	Shift Group *
<input type="checkbox"/>	7A-4:30P LAURA M	17020	08/23/2020		NO GROUP

Save Return to form listing

Shift Pattern Shifts Find

Del	Day *	Shift *	UDF 1	UDF 2	UDF 3	UDF 4
<input type="checkbox"/>	1	OFF				
<input type="checkbox"/>	2	7A-4:30P 17020				
<input type="checkbox"/>	3	7A-4:30P 17020				
<input type="checkbox"/>	4	7A-4:30P 17020				
<input type="checkbox"/>	5	7A-4:30P 17020				
<input type="checkbox"/>	6	7A-11A 17020				
<input type="checkbox"/>	7	OFF				

Save Return to form listing Top

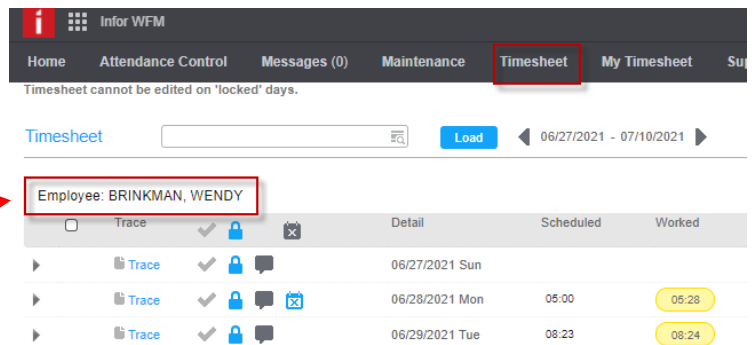
Shift Pattern Shift Labor Find


Shift Pattern Shifts *	Shift Pattern *	Start Time *	End Time *	Docket	Hour Type	Job	Time Code	Project	Cost Center Override	Activity	Team
No Records Found											

Save Return to form listing Top

Assigning a Shift Pattern to One Employee via Timesheet-Employee Override

1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in.
3. Click **Timesheet**.
4. Click on the **Employee's Name**.
5. This opens the **Employee Override** page where you can view ET balances, the employee's assigned/budgeted FTE and assign a new shift pattern for a short timeframe or permanently.




6. In the **Shift Pattern** box, click on the **Magnifying Glass** icon  to find the shift pattern you made earlier.
 - a. Search by the **Shift Pattern Name** or, type the cost center number in the **Description** box if you have followed this recommendation in creating your shift patterns.
 - b. Click **Find**.
 - c. Click the **shift pattern** you intend to assign to the employee.
 - i. If the employee already has a shift pattern assigned, you may need to choose **Not Assigned** as the shift pattern to clear the old pattern before you can assign your changed pattern.
 - d. Scroll to the bottom of the Employee Override page to determine the dates of the shift pattern and to submit your changes.

Employee Override

Show Balance Overrides Show Default Labor Overrides

Employee

Employee 204
 Last Name BRINKMAN
 First Name WENDY
 Day Start Time 12:00a

Shift Pattern Wendy 

Find	Shift Patterns	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>
	7A-3-30P 17020	17020
	7-30A-5P 17020	17020
	8-30A-5P 17020	17020
	7A - 5-30P 17020	17020
	8A - 4-30P 17020	17020
	7-30A-4P 17020	17020
	9A-5P 17020	17020
	9A-3P 17020	17020
	7-30A-6P 17020	17020
	9A-3P 17020 TEST	17020

< Prev 1 Next > Reset

7. **Remove** the checkmark from **Permanent**.
8. Choose the **Override Start Date** to begin (do not assign to previous pay periods or locked pay periods). This date should be a Sunday as that is the start of the work week.
9. Leave **Override End Date** as 1/1/3000 if this is going to be a long-term shift pattern. If you are only making this pattern for a shorter timeframe, then choose the Saturday date you want this shift pattern to end.

Permanent	Override Start Date	Override End Date	Apply To Employees	Apply To Teams	Override Comment
<input type="checkbox"/>	06/27/2021 	01/01/3000 	<input type="text"/>	<input type="text"/>	<input type="text"/>

Submit Save and Continue Cancel

10. Click **Submit**.
 - a. This returns you to the employee’s timesheet to confirm the shift pattern has been correctly assigned.
 - i. **Troubleshooting Tips:**
 1. If you do not see the shift pattern reflected, refresh your screen or log out and log back in to WFM.
 2. If the employee had a previously assigned shift pattern, you may have to clear the old shift pattern by first assigning the Shift Pattern of **Not Assigned** (see Step 6.c.i. above).