COOK COUNTY TIME

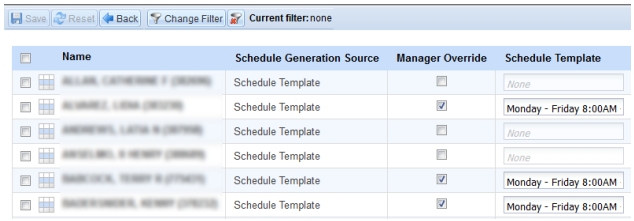
Job Aid: Assigning Schedule Templates & Cycles

Assigning a Schedule Template

1. To assign either a permanent or temporary schedule template, begin by selecting **Assign Schedules** from the **Schedules** area of the dashboard.
2. Choose **Assign Permanent Schedule Templates** or **Assign Temporary Schedule Templates**.

Assigning Permanent Schedule Templates

1. An administrator may develop schedule templates for employees with work activities that follow a regular pattern from pay period to pay period. Managers can then assign the schedule template once and have it applied on a permanent basis to successive pay periods.
2. In the **Permanent Changes** area, click **Assign Schedule Templates.**
3. Select an assignment group from the assignment tree on the left. A window appears that lists the employees in the selected group.



4. Select the **Manager Override** checkbox to activate the **Schedule Template** field.
5. (Optional) To apply the same values to more than one employee in the group, select the checkbox beside the name of each desired employee or select the checkbox at the top of the **Name** field to select all assignments. Make all changes in the **Mass Edit** section at the bottom of the window.
6. From the **Schedule Template** drop-down list, select the correct schedule template.
7. Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.
   - The recommended best practice is to select the first date in the pay period whenever possible.
   - The second best practice is to select the first date in the work week.
8. (Optional) If making changes to more than one employee in the group, make all of the changes described in Steps 4 through 6 in the Mass Edit row at the bottom of the screen and then click **Apply to all checked rows**.
9. After completing your permanent schedule template assignments, do one of the following:
   - Click the **Save** icon to save your changes.
   - Click the **Reset** icon to clear your changes and start over.
   - Click the **Back** icon to return to the Schedule Maintenance window without saving your changes.

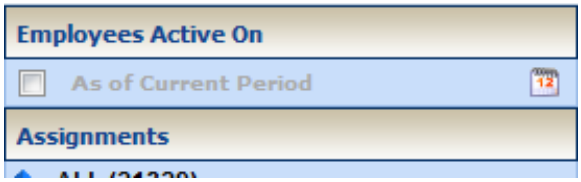
(*Continued on reverse side.*)

Assigning Temporary Schedule Templates

The process to assign a temporary schedule is identical to the process to assign permanent schedules. The only difference is that a temporary schedule will remain in effect for exactly one pay period. A permanent schedule remains in effect until it is changed or removed.

Assigning Schedules to Dates Outside of Current Pay Period

1. Managers can schedule employees for assignments to dates outside of the current pay period.
2. To assign either a permanent or temporary schedule template, begin by selecting **Assign Schedules** from the **Schedules** area of the dashboard. The Schedule Maintenance window appears.
3. In the **Permanent Changes** area of the **Schedule Maintenance** window, click **Assign Schedule Templates.**
4. Click the checkbox below **Employees Active On** and select the week you want to assign from the calendar.

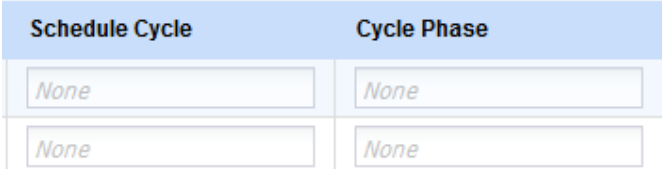


   The range in the **Valid Date Range** column at the right of the screen will change to a pay period that includes the week you've just selected.
5. Continue as described in Steps 2 through 8 in Assigning Permanent Schedule Templates.

Assigning Schedule Cycles

An administrator may develop schedule cycles (also known as rotating schedules) which reflect alternating work schedules. The cycle repeats itself after the last schedule in the sequence; i.e., the last phase of the cycle. Managers can then assign the schedule cycle and choose the phase at which the cycle will begin.

The process is identical to the process of assigning permanent schedules. The difference is you must select the phase of the rotation.



Examples:

- An employee joins a group that works a three week rotation. If the employee joins the group in week 2, then choose the week 2 schedule to ensure the employee is in sync with the rest of the group.
- A manager may want to alternate the schedules of two different assignments or groups of assignments. Using the same schedule cycle, a manager can have one assignment or group start with one phase, and have the other assignment or group start at another phase.