ASSIGNING AND EXTENDING PATTERNS

When an employee has been granted a permanent position, their work unit needs to be assigned, extended and verified.

PART I: Assigning a Pattern

1. Navigation:
   Staffing > Staffing Utilities > Manage Work Units > Manage Work Unit Patterns

2. The current date’s Manage Work Unit Patterns page populates blank:

3. **Effective Date**: Type or select the Friday date that the assignment is to become effective (i.e. 1/30/2009).

4. **End Date**: Select the end date of that schedule period (i.e. 4/9/2009).

**Special Notes:**

a. **Effective Date**: You must select a Friday date for the assignment to process.
b. You must click the location (Troop C - Tolland) to retrieve its information.
   c. Length of rotation determines when you can start the pattern:
      1. Weekly: Any Friday
      2. Biweekly: Friday Beginning Pay Period (8 Week Averaging: 56 or 112)
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5. **Select Location**: Click the location you need to access (i.e. Troop C - Tolland):

6. **Retrieve**: Click.

7. The updated Manage Work Unit Patterns page populates:

**Special Notes:**

a. A transferred employee will not populate in the Employee field until a Pattern is assigned to them.

b. **Employee**: Blank name means no one is assigned to that position:
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8. **Unassigned Work Units:** Locate the Work Unit that was created when the employee was transferred or hired (i.e. CUX2):

   ![Unassigned Work Units - Dbl Click to Add](image)

   **Special Note:**
   When a transfer occurs, you will receive an e-mail from HR, which will give you the Work Unit # to use and that employee will be in 'Unassigned Status'.

9. **View:** Click to access the Work Unit (i.e. CUX2).

10. The Employees page populates:

    ![Employees page](image)

11. Verify:
   a. Position Number
   b. Position Title
   c. Permanent Owner name

12. **Close:** Click.
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13. Manage Work Unit Patterns page populates again:

Special Note:
The Work Unit displayed on the Troop C Shift page was selected ‘behind the scenes’. When you click Add Selected, the Work Unit will populate on the last row of the Employee list.

14. **Add Selected**: Click.

15. **Work Unit Patterns**: Scroll down to the last row of the Employee list to locate the assigned employee’s Work Unit information (i.e. Common, Joe):

16. **Pattern**: Select the Pattern (i.e. 531D/FAR40V9B3L/Start 0630).

17. **Shift Type**: Select the Shift: (i.e. Days – 1st Shift).
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18. Verify the Work Unit, Pattern, Shift Type and Effective Begin Date fields:

19. Save: Click.

20. Close: Click.

Results:
You have successfully completed Assigning a Work Pattern! Now you need to Extend the Work Pattern.
PART II: Extending a Pattern

1. Navigation: Staffing > Staffing Utilities > Extend Schedules

2. The current date’s Extend Staff Schedules page populates blank:

3. Click to choose a 112 day schedule period (i.e. Dec 12 – Apr 9).

**Special Notes:**

a. **Begin Date**: If the employee is assigned to a Work Unit with a Begin Date that is after the Schedule Period’s Begin Date, manually enter that Work Unit’s Begin Date to access its records.

b. Sworn Personnel can only be started on a 56 or 112 day cycle.

c. Civilian Personnel can be started on any Friday (7 day or 14 day pattern).

d. **Select Location**: Defaults to your location (i.e. Troop C - Tolland).

e. **Employee Names**: Defaults as to populate the employee’s names attached to the records. Do not change.

4. **Select Work Unit Type**: Click the Work Unit Type you need to access (i.e. Public Safety).

5. **Retrieve**: Click.
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6. The updated Extend Staff Schedules page populates with Work Unit Patterns:

Special Note:
To manually sort the list, you can click either of the following topics:

Employee Name
Work Unit
Pattern
Shift Type
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7. Click the employee’s name (i.e. Common, Joe):

8. **Extend**: Click to create the shifts.

9. The Done! Message populates:

10. **OK**: Click.

11. **Save**: Click.

12. **Close**: Click.

**Special Notes:**
a. Only select the names for which you need to generate shifts.
b. You can select more than one name:
   1. To select names one by one: Hold down the Ctrl key and click one name at a time.
   2. To select a group of names at once: Hold down the Shift key and click the first name row and the last name row.
   3. **Select All**: Allows you to select all of the records to generate shifts for.

**Results:**
You have successfully completed Extending a Work Pattern! The final step you need to complete is to verify the shifts were created on the correct days.
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Part III: Verifying the Shifts
1. Navigation: Staffing > Staffing Utilities > Verify Shifts
2. The Verify Shifts page populates with the current schedule period dates:

3. **Begin Date**: Verify the scheduling period’s first day (i.e. 12/19/2008).

4. **End Date**: Verify the scheduling period’s last day (i.e. 4/9/2009).

**Special Notes:**

a. ![Select Location Icon]: Click to select another Scheduling Period (updates Begin and End Date).

b. ![Search Icon]: Click to search by Position Number.

5. **Select Location**: Defaults to your location (i.e. Troop-C-Tolland).

6. **Work Unit**: Scroll down the Employee list to locate the employee (i.e. Common, Joe).
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7. Click the employee’s name (i.e. Common, Joe):

8. **Get Hours**: Click.

9. The Verify Shifts page populates for the selected employee:

Reminder:
The shift hours populate from the beginning of the current Scheduling Period.
10. Scroll down the Work Unit rows until you reach the employee’s transfer date (i.e. 30-Jan-2009):

11. Verify the following fields:
- **Timesheet Date**
- **Shift Type**
- **Shift Start**
- **Shift End**
- **Allocation**
- **Reg Hours**

12. **Close**. Click.

**Special Note:**
The Verify Shifts page can also be used to:
- Enter shifts for an employee’s Work Unit
- Delete shifts for an employee’s Work Unit

***Instructions on how to perform these updates can be found in the “Verifying and Updating Shifts” training document.

**Results:**
Congratulations! You have assigned and extended an employee’s work unit and verified that the corresponding shifts were correct!