



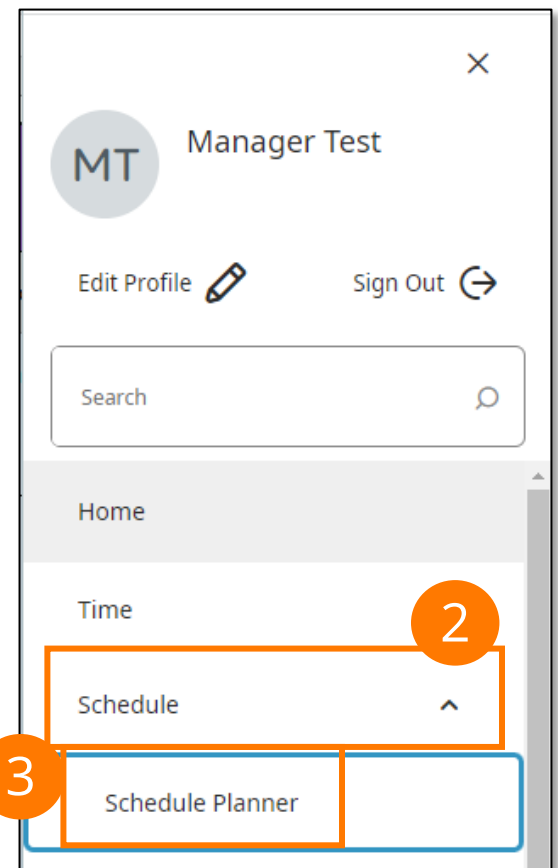
Navigation to Ulti Time & Attendance

Upon logging into Ulti, the dashboard will appear.

1. From the left-hand navigation panel, select the **Myself**  icon.
2. Select **Workforce Management**. A new tab opens, and the Ulti Time and Attendance homepage is displayed.

Complete Schedule

1. From the Ulti Time and Attendance homepage, select the **Menu**  icon in the upper left corner to open the menu.
2. Select the **Schedule** drop-down.
3. Select **Schedule Planner**. The Schedule Planner screen is displayed.

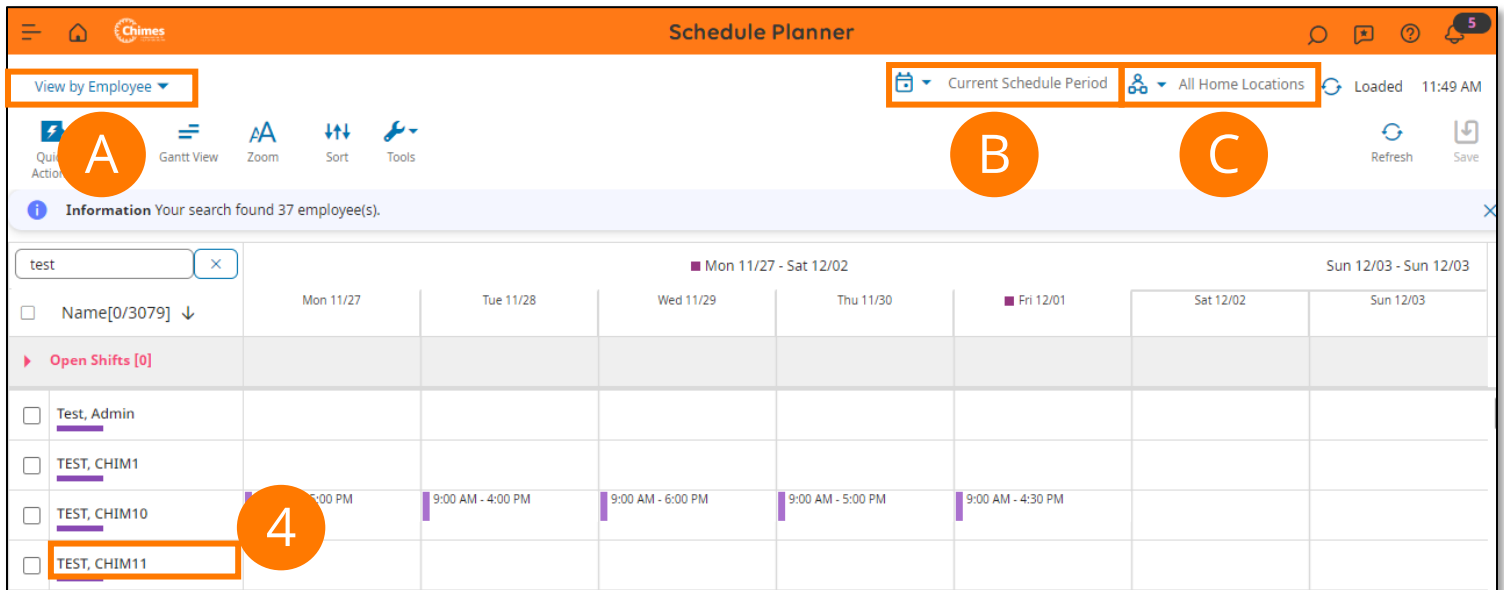


Complete Schedule (continued)

On the Schedule Planner screen, the following **filters** can be used to adjust the results shown.

- A. **View By:** View data by Employee, Job, Schedule Group, or Employment Terms.
 - B. **Date Selector:** To change the date of the plan, use the Timeframe selector.
 - C. **Location Selector:** If you have access to multiple locations, use the Location Selector to select the appropriate one.
4. To create a schedule for a single team member, **right click** on their **name** in the Name column. A pop-up box will appear.

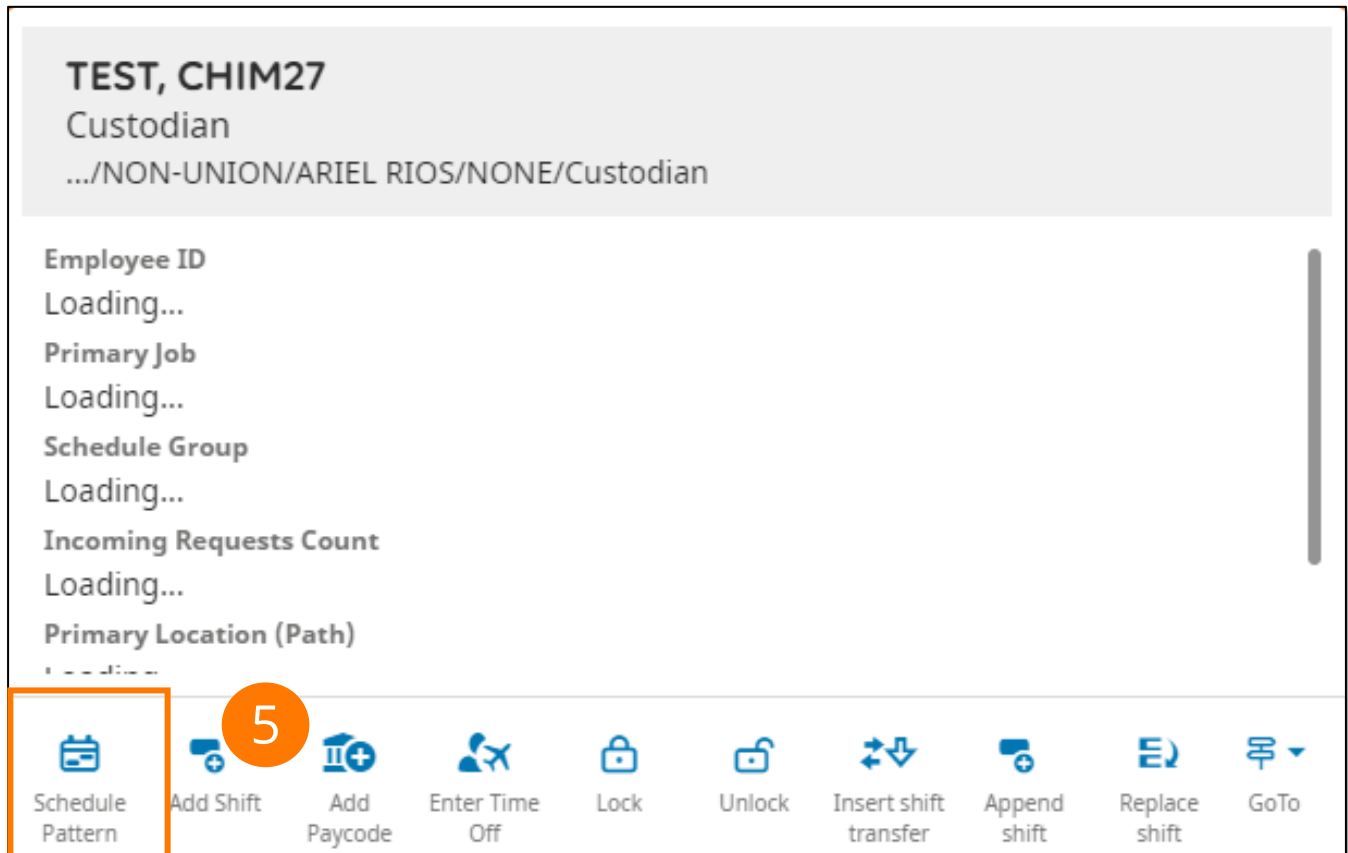
Note: To create a schedule for multiple team members, select the checkboxes next to their names, then right click on any name.



The screenshot displays the Chimes Schedule Planner interface. At the top, there is a navigation bar with the Chimes logo and the title 'Schedule Planner'. Below the navigation bar, there are several filters and controls. The 'View by Employee' dropdown is highlighted with a red box and labeled 'A'. The 'Current Schedule Period' and 'All Home Locations' dropdowns are highlighted with red boxes and labeled 'B' and 'C' respectively. Below these filters, there is a search bar containing the text 'test'. The main area of the interface is a calendar grid showing the schedule for the period from Monday, November 27, to Sunday, December 3. The calendar grid is divided into columns for each day. Below the calendar grid, there is a list of employees. The employee 'TEST, CHIM11' is highlighted with a red box and labeled '4'. The list of employees includes 'Test, Admin', 'TEST, CHIM1', 'TEST, CHIM10', and 'TEST, CHIM11'. The 'TEST, CHIM11' row is highlighted with a red box.

Complete Schedule (continued)

- At the bottom of the pop-up box, select **Schedule Pattern**. The Schedule Pattern screen will appear.



TEST, CHIM27
Custodian
.../NON-UNION/ARIEL RIOS/NONE/Custodian

Employee ID
Loading...

Primary Job
Loading...

Schedule Group
Loading...

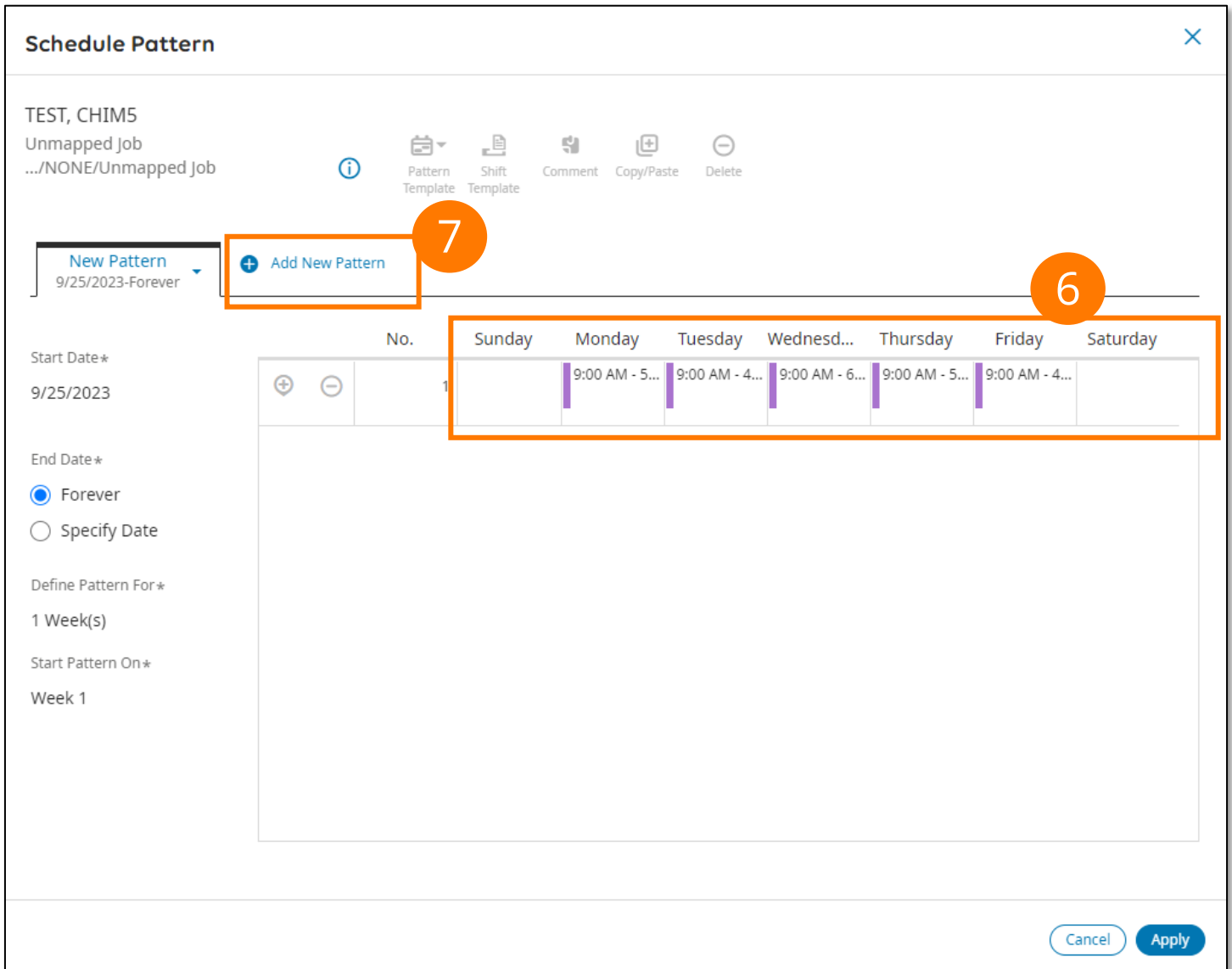
Incoming Requests Count
Loading...

Primary Location (Path)
Loading...

Schedule Pattern Add Shift Add Paycode Enter Time Off Lock Unlock Insert shift transfer Append shift Replace shift GoTo

Complete Schedule (continued)

- On the Schedule Pattern screen, the **current schedule** is displayed.
- To edit the current schedule or create a new schedule, select **Add New Pattern**.



The screenshot shows the 'Schedule Pattern' interface. On the left, there are fields for 'Start Date*' (9/25/2023), 'End Date*' (Forever selected), 'Define Pattern For*' (1 Week(s)), and 'Start Pattern On*' (Week 1). On the right, there is a table with columns for days of the week. The 'Add New Pattern' button is highlighted with an orange box and a circled '7'. The table header and the first row of data are highlighted with an orange box and a circled '6'.

No.	Sunday	Monday	Tuesday	Wednesd...	Thursday	Friday	Saturday
1		9:00 AM - 5...	9:00 AM - 4...	9:00 AM - 6...	9:00 AM - 5...	9:00 AM - 4...	

Complete Schedule (continued)

8. Enter the **start date** and specify the **end date**.

Selecting **Forever** will enable the plan to continue in perpetuity, until it is edited again.

9. Complete the **Define Pattern** fields. This specifies the length of the cycle that repeats (in weeks or days).

Schedule Pattern

TEST, CHIM5
Unmapped Job
.../NONE/Unmapped Job

Pattern Template Shift Template Comment Copy/Paste Delete

New Pattern 9/25/2023-Forever **New Pattern1** 1/15/2024-Forever + Add New Pattern

No.	Sunday	Monday	Tuesday	Wedne...	Thursd...	Friday	Saturd...
1							

Start Date*
1/15/2024

End Date*
 Forever
 Specify Date

Define Pattern For*
1 Week(s)

Override Other Patterns

Start Pattern On*
Week 1

Cancel Apply







Complete Schedule (continued)


10. To add a shift, select the appropriate cell. You can enter a shift in three different ways.


- A. **Type the shift into the cell** using either the 12-hour format (9a-5p) or the 24-hour format (9-17).

Schedule Pattern

TEST, CHIM5
Unmapped Job
.../NONE/Unmapped Job

  Pattern Template  Shift Template  Comment  Copy/Paste  Delete

New Pattern 9/25/2023-Forever **New Pattern1** 1/15/2024-Forever  Add New Pattern

Start Date* 

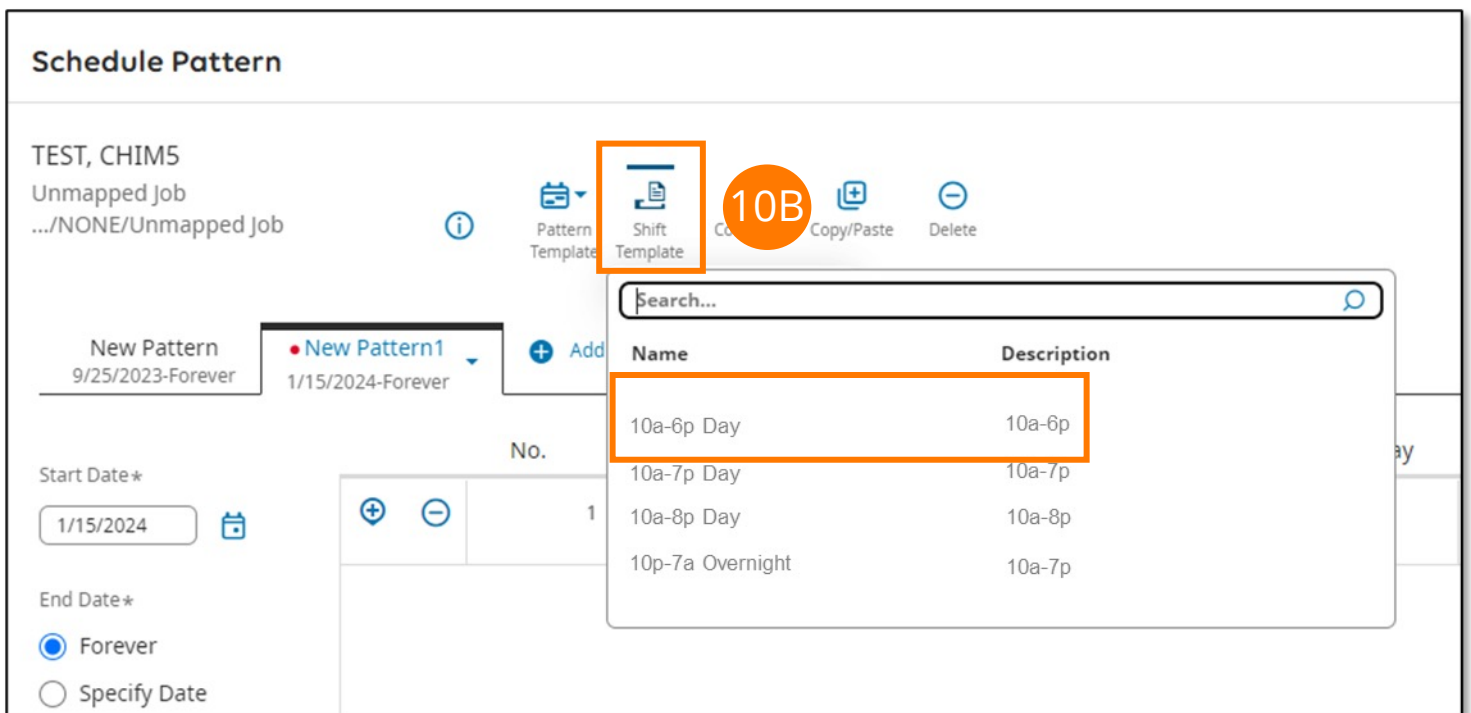
No.	Sunday	Monday	Tuesday
1		9:00 AM - 5:00 PM	

10A

Complete Schedule (continued)

- B. Shift Templates:** Shifts can also be added from a library of pre-populated shift templates. To do so, select the Shift Template icon and select the desired shift from the drop-down. The cursor will become a plus sign (+). Click the cell(s) you wish to add the shift to.

To turn off Shift Templates, select the Shift Template icon again.



Schedule Pattern

TEST, CHIM5
Unmapped Job
.../NONE/Unmapped Job

Pattern Template Shift Template Copy/Paste Delete

New Pattern 9/25/2023-Forever
New Pattern1 1/15/2024-Forever

Start Date* 1/15/2024

End Date* Forever Specify Date

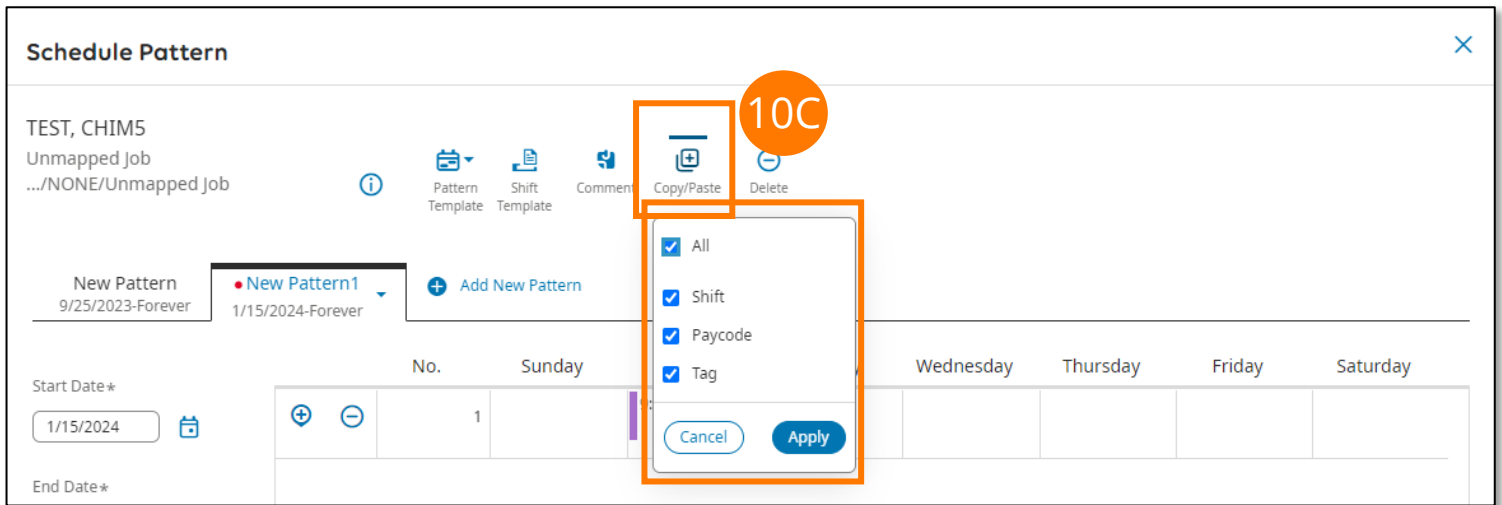
Name	Description
10a-6p Day	10a-6p
10a-7p Day	10a-7p
10a-8p Day	10a-8p
10p-7a Overnight	10a-7p

Complete Schedule (continued)

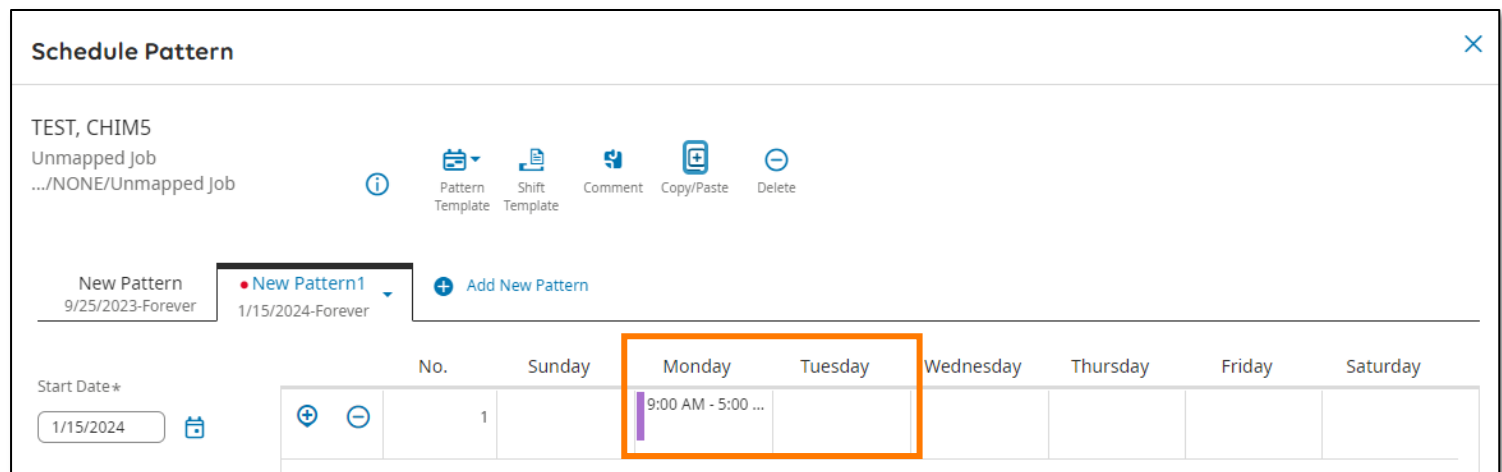
- C. Copy/Paste feature:** Shifts can also be added using the Copy/Paste feature. To do so, select the Copy/Paste icon and select the aspects of the shift you wish to copy and select Apply.

The cursor will become a plus sign (+). Click the shift you wish to copy and then click the cell you wish to copy it to.

To turn off the Copy/Paste feature, select the icon again.



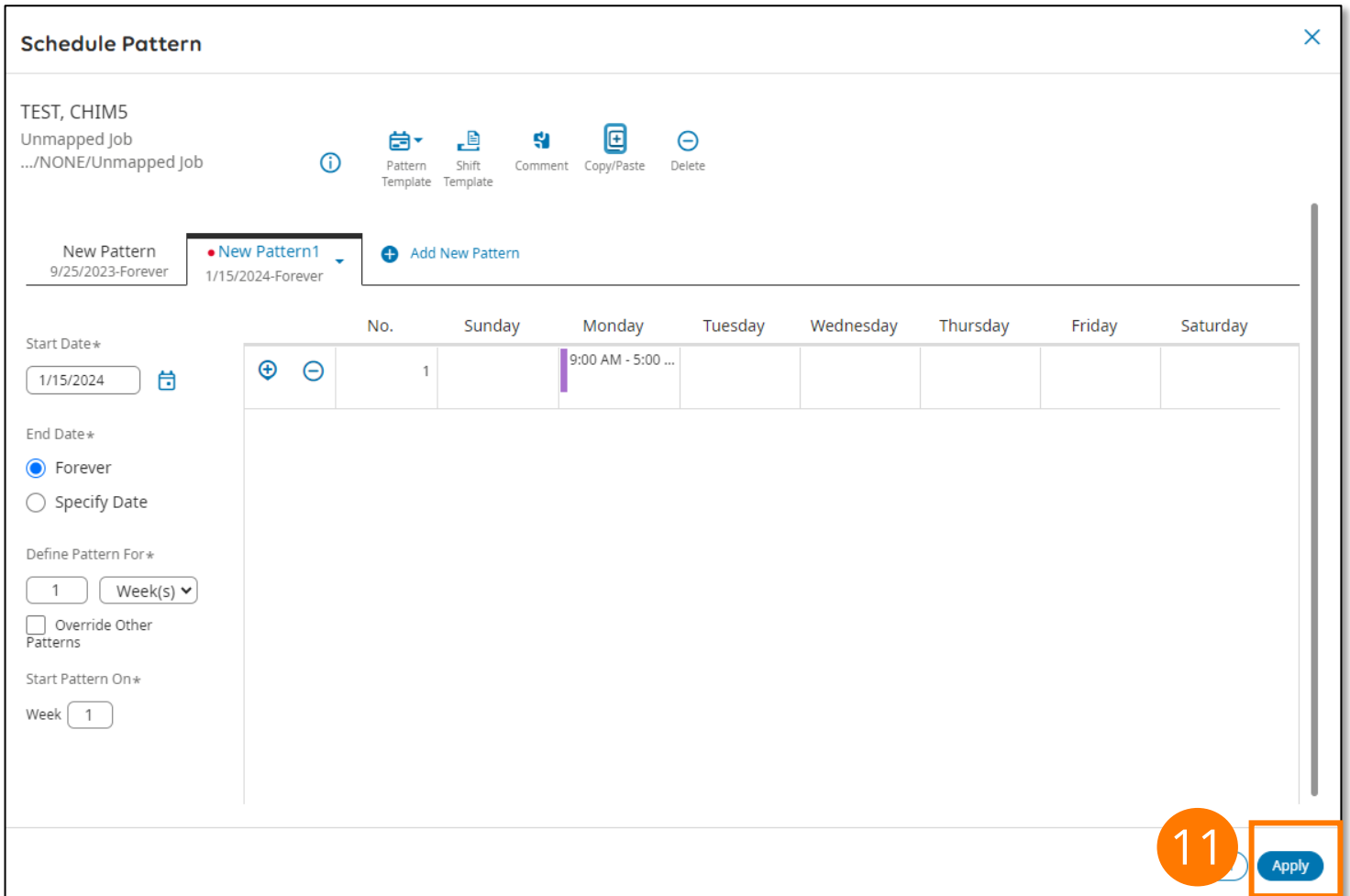
The screenshot shows the 'Schedule Pattern' interface for 'TEST, CHIM5'. The 'Copy/Paste' icon is highlighted with an orange box and a '10C' label. A dropdown menu is open, showing options: 'All' (checked), 'Shift' (checked), 'Paycode' (checked), and 'Tag' (checked). The 'Apply' button is also highlighted with an orange box. The interface includes fields for 'New Pattern' (9/25/2023-Forever), 'New Pattern1' (1/15/2024-Forever), and 'Add New Pattern'. A table below shows columns for 'No.', 'Sunday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. The 'No.' column has a value of '1'.



The screenshot shows the 'Schedule Pattern' interface for 'TEST, CHIM5'. The 'Copy/Paste' icon is now disabled (greyed out). The 'Apply' button is no longer visible. The interface includes fields for 'New Pattern' (9/25/2023-Forever), 'New Pattern1' (1/15/2024-Forever), and 'Add New Pattern'. A table below shows columns for 'No.', 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. The 'No.' column has a value of '1'. The 'Monday' column has a value of '9:00 AM - 5:00 ...'.

Complete Schedule (continued)

11. When the schedule is complete, select **Apply** at the bottom right corner of the screen. The Schedule Planner screen is displayed.



Schedule Pattern [Close]

TEST, CHIM5
Unmapped Job
.../NONE/Unmapped Job

Info Pattern Template Shift Template Comment Copy/Paste Delete

New Pattern 9/25/2023-Forever | **New Pattern1** 1/15/2024-Forever | Add New Pattern

Start Date* 1/15/2024 [Calendar Icon]

End Date*
 Forever
 Specify Date

Define Pattern For*
1 Week(s) [Dropdown]

Override Other Patterns

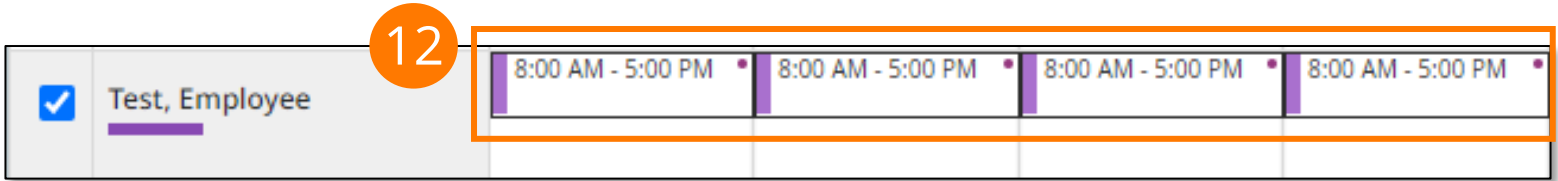
Start Pattern On*
Week 1

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		9:00 AM - 5:00 ...					

11 [Apply]

Complete Schedule (continued)

12. On the Schedule Planner screen, the schedule that was just created is now shown. Each newly-added shift is indicated by a **red dot** in the corner.



13. Note that the Save icon in the top right is purple. This is a visual indicator that there are unsaved changes. When satisfied with the changes, click **Save** in the upper right corner.

The schedule has now been applied to the selected team members.

