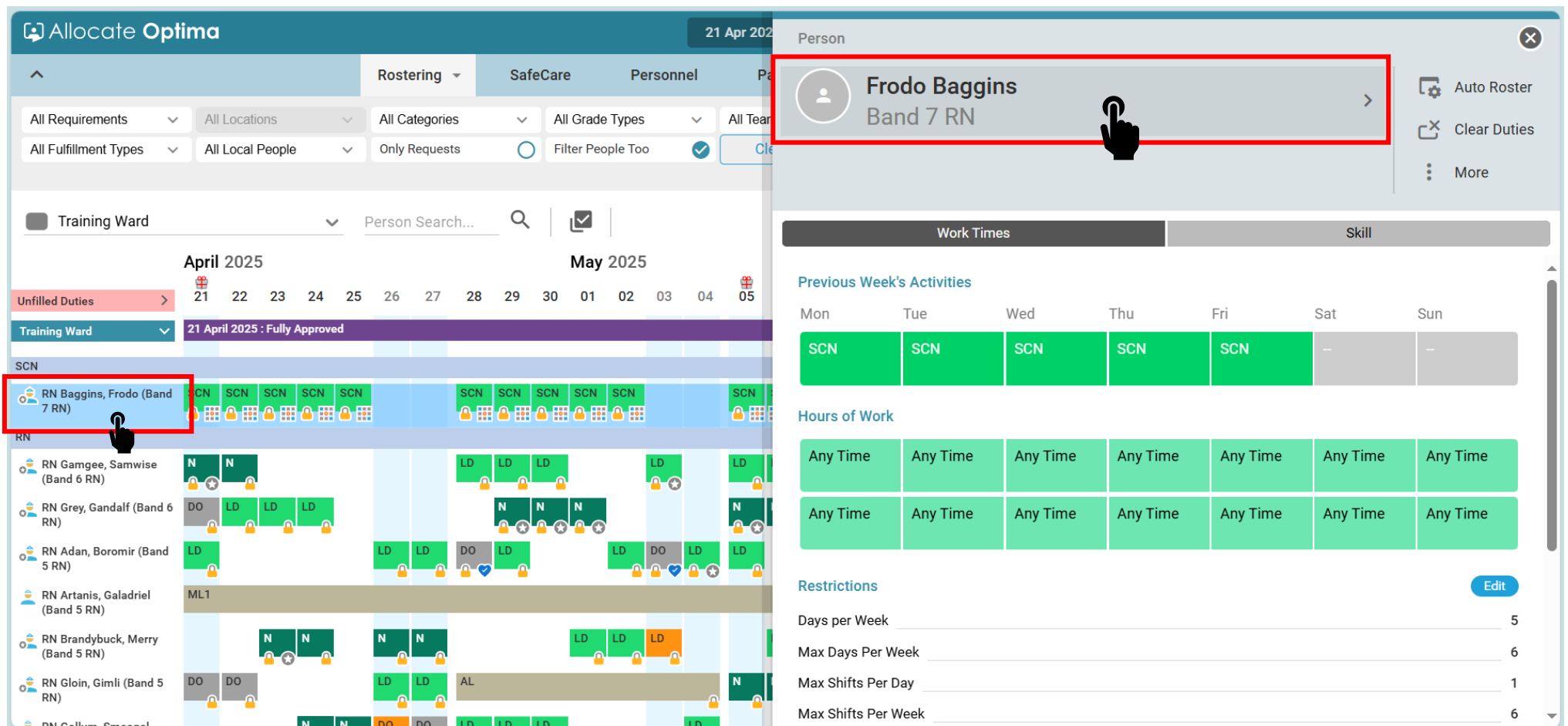


Create Personal Pattern

- Click on the employee's name in the roster
- Click on the employee's name at the top of the slide-in panel



Allocate Optima 21 Apr 2025

Person

Frodo Baggins
Band 7 RN

Auto Roster
Clear Duties
More

Work Times Skill

Previous Week's Activities

Mon	Tue	Wed	Thu	Fri	Sat	Sun
SCN	SCN	SCN	SCN	SCN	-	-

Hours of Work

Any Time	Any Time	Any Time	Any Time	Any Time	Any Time	Any Time
Any Time	Any Time	Any Time	Any Time	Any Time	Any Time	Any Time

Restrictions

Days per Week 5

Max Days Per Week 6

Max Shifts Per Day 1

Max Shifts Per Week 6

Training Ward

Person Search...

April 2025 May 2025

Unfilled Duties

21 April 2025 : Fully Approved

SCN

RN Baggins, Frodo (Band 7 RN)

RN Gamgee, Samwise (Band 6 RN)

RN Grey, Gandalf (Band 6 RN)

RN Adan, Boromir (Band 5 RN)

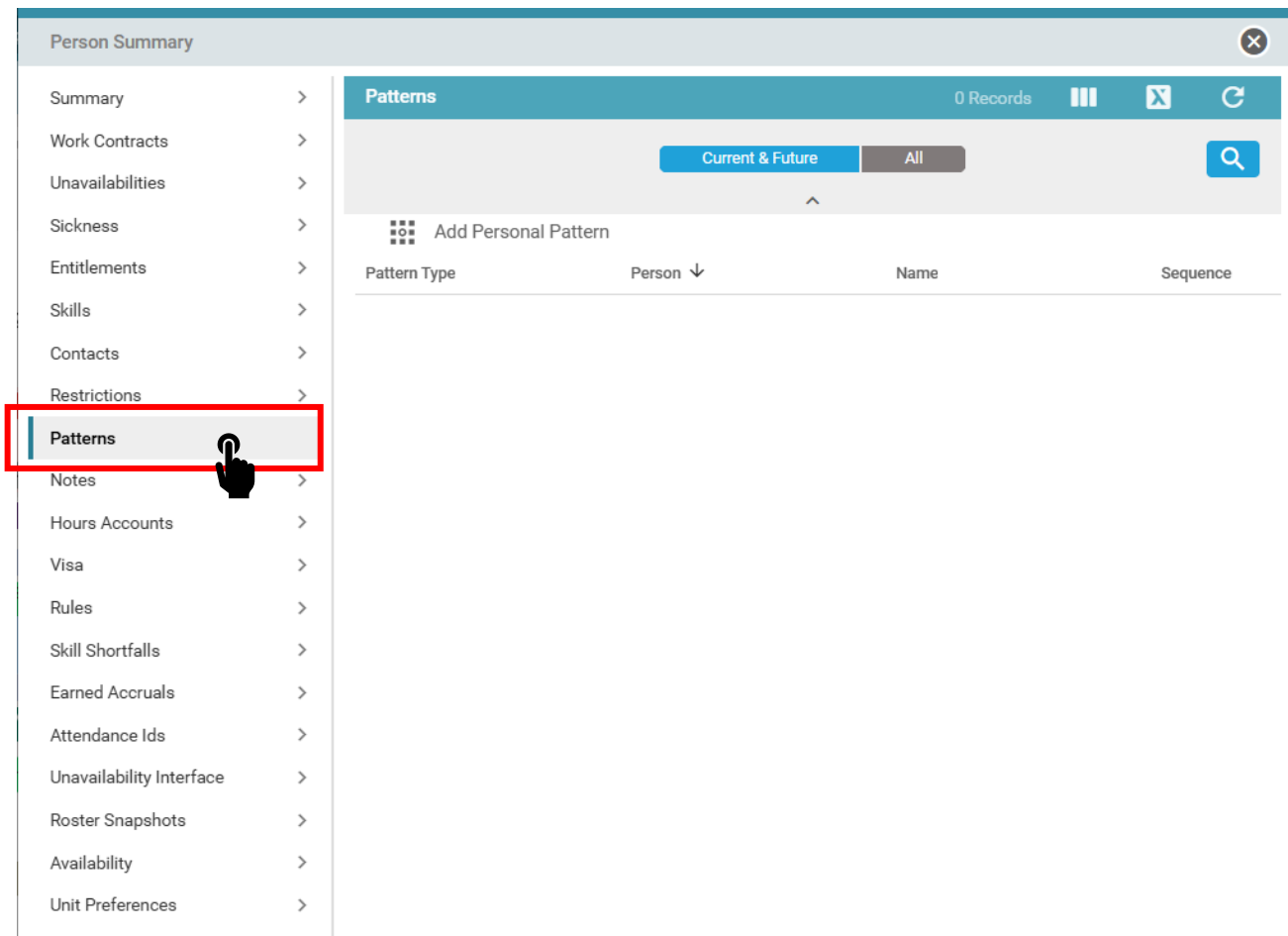
RN Artanis, Galadriel (Band 5 RN)

RN Brandybuck, Merry (Band 5 RN)

RN Gloin, Gimli (Band 5 RN)

RN Gollum, Sméagol

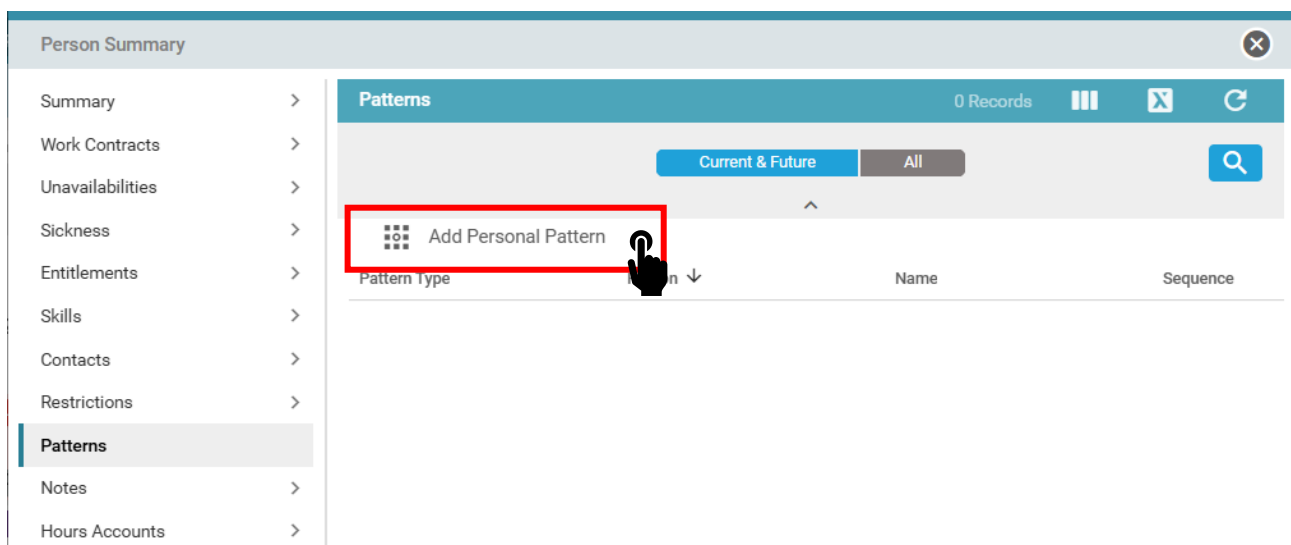
- Select **Patterns** in the menu on the slide-in panel



The screenshot shows the 'Person Summary' interface. On the left is a vertical menu with various options. The 'Patterns' option is highlighted with a red rectangular box, and a hand cursor icon is positioned over it. The main content area on the right is titled 'Patterns' and shows '0 Records'. It includes filter buttons for 'Current & Future' and 'All', a search icon, and an 'Add Personal Pattern' button. Below these is a table with headers: 'Pattern Type', 'Person', 'Name', and 'Sequence'.

Pattern Type	Person	Name	Sequence
--------------	--------	------	----------

- Then click on **Add Personal Pattern**



This screenshot shows the same 'Person Summary' page, but now the 'Patterns' menu item in the left sidebar is selected. In the main 'Patterns' section, the 'Add Personal Pattern' button is highlighted with a red rectangular box, and a hand cursor icon is clicking on it. The table below remains empty.

Pattern Type	Person	Name	Sequence
--------------	--------	------	----------

- If the staff member has multiple posts (i.e. a Substantive and a Bank Post), ensure the correct Posting is selected at the top of the page.

Add Personal Pattern

Name *

Rosa Diaz (9648525)

Posting *

Bank (Bank Weekly - Band 5 RN)

Training Ward 11 (Band 5 RN)

Valid From

Valid To

Pattern De

Monthly Recurring Activities

Lines

1

-

+

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours
Line 1								
Total:								

Item Details

☒ Duty
 ☐ Unavailability

Shift Group

Please select

Shift

-

Roster Location

-

Team

-

Activity Category

-

Activity Groups

-

Activity Type

-

Activity Profile

-

Work

00:00

Start

00:00

End

00:00

Add

Update

Cancel

OK

- If the pattern will span over multiple weeks, add a line for each week using the + button.

Add Personal Pattern

Name *

Frodo Baggins (12345678)

Posting *

Training Ward (Band 7 RN)

Valid From

09/09/2024

Valid To

31/12/9999

Pattern Details

Monthly Recurring Activities

Lines

4

-

+

Mon

Tue

Wed

Thu

Fri

Sat

Sun

Line 1

Line 2

Line 3

Line 4

Total:

00:00

00:00

00:00

Add

Update

Cancel

OK

Item Details

Duty

Unavailability

Shift Group

Training Ward

Shift

Roster Location

Team

Activity Category

Activity Groups

Activity Type

Activity Profile

Work

Start

End

- On the right-hand side, select the required shift you would like to enter from the drop-down menu.

Add Personal Pattern

Name *

Frodo Baggins (12345678)

Posting *

Training Ward (Band 7 RN) ▼

Valid From

09/09/2024

Valid To

31/12/9999

Pattern Details

Monthly Recurring Activities

Lines

1

–

+

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours
Line 1								
Total:								

Item Details

☒ Duty
 ☐ Unavailability

Shift Group

Training Ward ***

Shift

–

DO

E

L

LD

N

SCN

Activity Type

–

Activity Profile

–

Work

00:00

Start

00:00

End

00:00

Add

Update

Cancel

OK

- [illegible]

- Once the required days have been selected, click **Add** to populate with the chosen shift.

Add Personal Pattern

Name *

Frodo Baggins (12345678)

Posting *

Training Ward (Band 7 RN)

Valid From

09/09/2024

Valid To

31/12/9999

Pattern Details

Monthly Recurring Activities

Lines

4

-

+

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours
Line 1			LD	LD	LD			34:30
Line 2	LD	LD		LD	LD			46:00
Line 3								-
Line 4					LD	LD	LD	34:30
Total:								115:00

Item Details

☒ Duty
 ☐ Unavailability

Shift Group

Training Ward

Shift

LD

Roster Location

-

Team

-

Activity Category

-

Activity Groups

-

Activity Type

-

Activity Profile

-

Work

11:30

Start

07:00

End

19:30

Add

Update

Cancel

OK

- To add a different shift, change the selected shift on the right-hand side, select the required days, then click **Add**.

Add Personal Pattern

Name *

Frodo Baggins (12345678)

Posting *

Training Ward (Band 7 RN) ▼

Valid From

09/09/2024

Valid To

31/12/9999

Pattern Details

Monthly Recurring Activities

Lines

4

–

+

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours
Line 1			LD	LD	LD			34:30
Line 2	LD	LD		LD	LD			46:00
Line 3			N	N	N			34:30
Line 4					LD	LD	LD	34:30
Total:								149:30

Item Details

☒ Duty
 ☐ Unavailability

Shift Group

Training Ward ***

Shift

N ▼

Roster Location

- ▼

Team

- ▼

Activity Category

- ▼

Activity Groups

- ▼

Activity Type

- ▼

Activity Profile

- ▼

Work

11:30

Start

19:00

End

07:30

Add

Update

Cancel

OK

- Add Personal Pattern

Name *
Frodo Baggins (12345678)

Posting *
Training Ward (Band 7 RN) ▼

Valid From
09/09/2024 📅

Valid To
31/12/9999 📅

Pattern Details

Monthly Recurring Activities

Lines
4 - +

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours
Line 1			LD	LD	LD			34:30
Line 2	LD	LD		LD	LD			46:00
Line 3								-
Line 4					LD	LD	LD	34:30
Total:								115:00

Item Details

Duty ☒ Unavailability ☐

Shift Group
Training Ward ⋮

Shift
N ▼

Roster Location
- ▼

Team
- ▼

Activity Category
- ▼

Activity Groups
- ▼

Activity Type
- ▼

Activity Profile
- ▼

Work
10:30

Start
20:00

End
07:30

Add Update

NOTE: the **Work** field is the number of working hours within the shift (excl. break times) and will update automatically as you edit the Start and End times but always double-check that this figure is correct to ensure the break time is still accurate once the shift has been amended. If it is incorrect, you can manually edit the **Work** field as well.

- To edit shift times **after** entering the shifts into the pattern, select the required shift(s) from the pattern, edit the times as per the above, at the bottom-right of the panel, then click **Update**.
- The shift(s) will now appear with a clock icon and the adjusted times showing.

Add Personal Pattern

Name *
Frodo Baggins (12345678)

Posting *
Training Ward (Band 7 RN)

Valid From
09/09/2024

Valid To
31/12/9999

Pattern Details

Monthly Recurring Activities

Add Note
Reset Times
Remove
Assign Pay Flags

Mon
Tue
Wed
Thu
Fri
Sat
Sun

Line 1

LD 08:00-19:30
LD 08:00-19:30
LD 08:00-19:30

31:30

Line 2

LD LD
LD LD

46:00

Line 3

N N N

34:30

Line 4

LD LD LD

34:30

Total:

146:30

Item Details

☒ Duty
☐ Unavailability

Shift Group
Training Ward

Shift
LD

Roster Location
-

Team
-

Activity Category
-

Activity Groups
-

Activity Type
-

Activity Profile
-

Work
10:30

Start
08:00

End
19:30

Add
Update

Cancel
OK

NOTE: After selecting the first shift, use the **Select Similar** option in the menu along the top to select all instances of that shift in the pattern.

- To reset adjusted times in a shift, select the required shift(s) in the pattern, then select **Reset Times** from the menu along the top.

Add Personal Pattern

Name *
Frodo Baggins (12345678)
Posting *
Training Ward (Band 7 RN)
Valid From
09/09/2024
Valid To
31/12/9999

Pattern Details
Monthly Recurring Activities

Add Note
Reset Times
Remove
Assign Pay Flags

Mon
Tue
Wed
Thu
Fri
Sat
Sun

Line 1
LD 08:00-19:30
LD 08:00-19:30
LD 08:00-19:30

Line 2
LD
LD
LD
LD

Line 3
N
N
N

Line 4
LD
LD
LD

Total:
146:30

Lines
4

Total Hours
31:30
46:00
34:30
34:30

Item Details

Duty
Unavailability

Shift Group
Training Ward

Shift
LD

Roster Location

Team

Activity Category

Activity Groups

Activity Type

Activity Profile

Work
10:30
Start
08:00
End
19:30

Add
Update

Cancel
OK

- To remove shifts from the pattern, select the required shift(s) in the pattern, then select **Remove** from the menu along the top.

Add Personal Pattern

Name *
Frodo Baggins (12345678)
Posting *
Training Ward (Band 7 RN)
Valid From
09/09/2024
Valid To
31/12/9999

Pattern Details

Monthly Recurring Activities

Add Note

Remove

Assign Pay Flags

Mon

Tue

Wed

Thu

Fri

Sat

Sun

Total Hours

Line 1

Line 2

Line 3

Line 4

Total:

LD

LD

N

LD

LD

LD

34:30

46:00

34:30

34:30

149:30

Lines

4

-

+

Item Details

☒ Duty
☐ Unavailability

Shift Group
Training Ward

Shift
LD

Roster Location
-

Team
-

Activity Category
-

Activity Groups
-

Activity Type
-

Activity Profile
-

Work

Start

End

10:30

08:00

19:30

Add

Update

Cancel

OK

- Once the pattern has been completed, click the OK button in the bottom right-hand corner. The pattern will now appear the Patterns section of the Person Summary panel.

Person Summary

Summary >

Work Contracts >

Unavailabilities >

Sickness >

Entitlements >

Skills >

Contacts >

Restrictions >

Patterns

Notes >

Hours Accounts >

Patterns

1 Records

✓

⏏

✕

↺

Current & Future

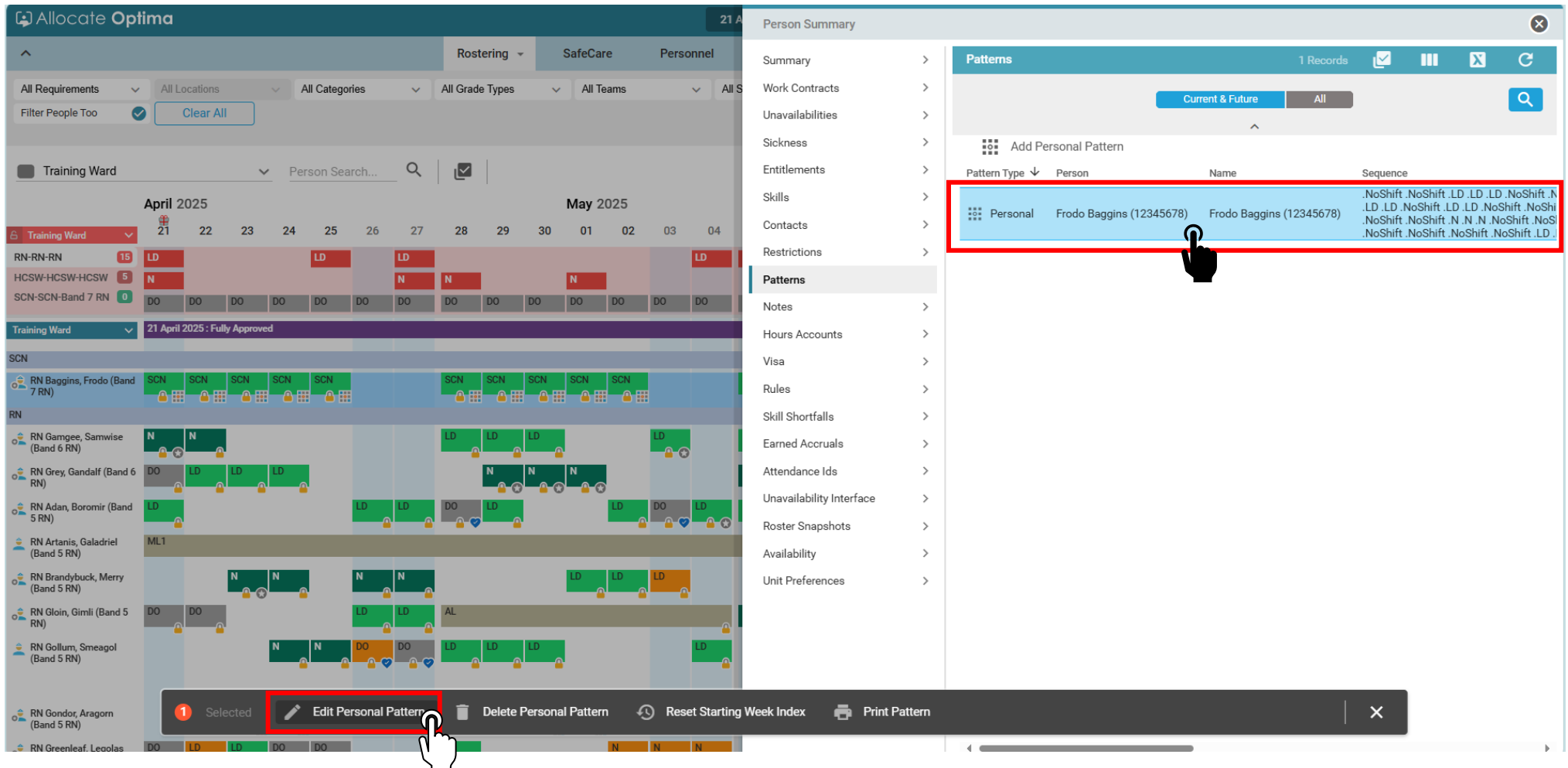
All

🔍

⚙️ Add Personal Pattern

Pattern Type ↓	Person	Name	Sequence
⚙️ Personal	Frodo Baggins (12345678)	Frodo Baggins (12345678)	.NoShift .NoShift .LD .LD .LD .NoShift .N .LD .LD .NoShift .LD .LD .NoShift .NoShi .NoShift .NoShift .N .N .N .NoShift .NoS .NoShift .NoShift .NoShift .NoShift .LD .

- To edit an existing pattern, simply click on the pattern in the Person Summary panel and select **Edit Personal Pattern** from the menu along the bottom. Then follow the steps as above to make the required amendments.



The screenshot displays the Allocate Optima interface. On the left, the main roster view shows a calendar for April and May 2025. On the right, the 'Person Summary' panel is open, showing a list of patterns for a selected person. The 'Patterns' table is highlighted with a red box, and a hand cursor is pointing at the first row. The table has columns for Pattern Type, Person, Name, and Sequence. The first row is highlighted in blue.

Pattern Type	Person	Name	Sequence
Personal	Frodo Baggins (12345678)	Frodo Baggins (12345678)	NoShift .NoShift .LD .LD .LD .NoShift .N .LD .LD .NoShift .LD .LD .NoShift .NoShift .NoShift .N .N .N .NoShift .NoShift .NoShift .NoShift .LD .LD .

At the bottom of the interface, a dark bar contains several buttons. The 'Edit Personal Pattern' button is highlighted with a red box and a hand cursor is pointing at it.