

# KRONOS TRAINING

CT SCHEDULING MANAGER

# AGENDA

## Getting Started

- Signing in
- Understanding the Kronos Navigator
- Viewing your information

## Finding your team

- Search for an employee report
- Working with hyperfinds
- Working with Genies

## Timecards

- Editing punches
- Editing pay codes
- Adding comments
- Adding rows
- Transfers
- Reviewing time off

## Schedules

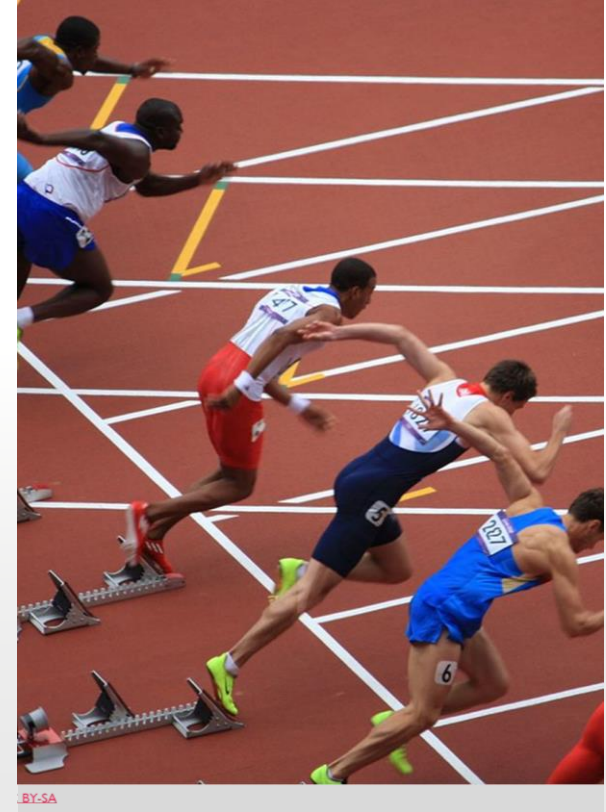
- Adding schedules
- Adding a pattern
- Editing a schedule
- Finding your team hyper find
- Shift Transfer

## Advanced Scheduler

- Workload Planner
- VOT and MOT
- Finding Team location
- Assigning overtime shift
- Call List/Scheduling Ass.
- Shift Transfer
- Manage schedule posting
- Column sets
- Quick Actions
- Assigning/Unassigning shifts
- Changing views
- Priority Scheduling Engine
- Reporting

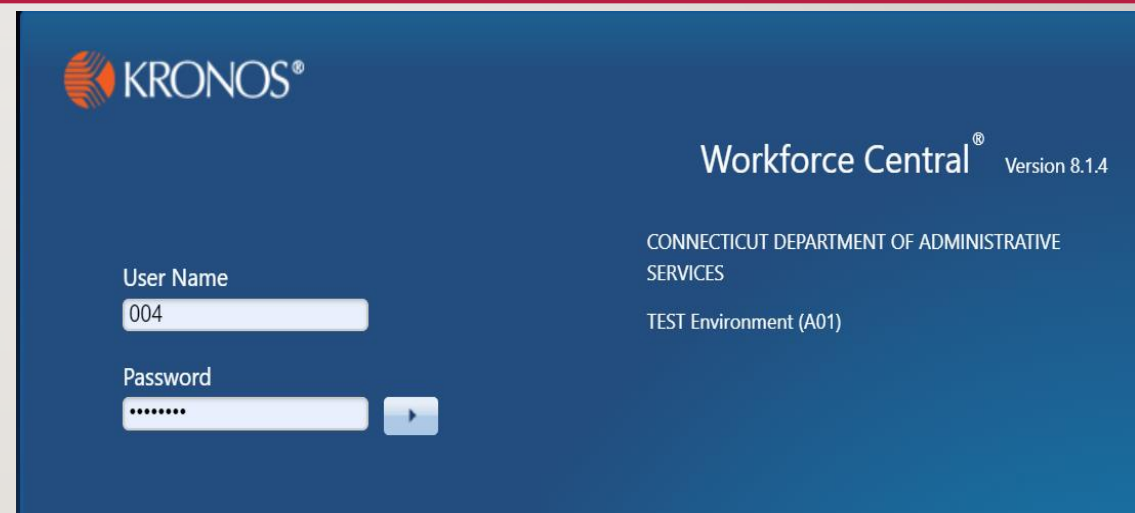
# GETTING STARTED

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# GETTING STARTED – SIGNING IN

- Now that you have successfully swiped let's log on to Kronos.
- Open a web browser and enter:
  - <https://ctgov.kronos.net/wfc/login>
- Enter your user name and password



KRONOS®

Workforce Central® Version 8.1.4

CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES

TEST Environment (A01)

User Name  
004

Password  
.....

## Notes:

- If you're viewing this before the system has gone live only view the training in its entirety, after the system has gone live you will be able to sign in and view all the functionality firsthand.
- Single sign on is enabled when you on the State network using a state device and the log in is associated with your Windows account, and will utilize your State of Connecticut email and password to automatically log you into Kronos.
- This slide shows the procedure to sign in on approved when you are outside the State of Connecticut network. Please check with DCF leadership to ensure when it is appropriate to log in from a personal device.

# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

**KRONOS**

My Information + 2

My Timecard Manage My Department Interfaces

Loaded: 11:56 PM Current Pay Period

View Approve Timecard

Print Timecard Refresh Calculate Totals Save

	Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
+ x	Fri 1/03	8:00AM-4:00...											
+ x	Sat 1/04												
+ x	Sun 1/05												
+ x	Mon 1/06	8:00AM-4:00...											
+ x	Tue 1/07	8:00AM-4:00...											
+ x	Wed 1/08	8:00AM-4:00...											
+ x	Thu 1/09	8:00AM-4:00...											
+ x	Fri 1/10	8:00AM-4:00...											
+ x	Sat 1/11												
+ x	Sun 1/12												

1. Employee timecard:  
Can add your own punches, add specific pay codes, and also approve your timecard
2. Clicking the ' + ' sign will bring you a list of the different modules you can access, as a timekeeper you can manage your department and export time reports

# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

**KRONOS**

My Information + Manage My Department Interfaces

My Timecard

Loaded: 11:56 PM Current Pay Period

View Approve Timecard

Print Timecard Refresh Calculate Totals Save

	Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
+ x	Fri 1/03	8:00AM-4:00...											
+ x	Sat 1/04												
+ x	Sun 1/05												
+ x	Mon 1/06	8:00AM-4:00...											
+ x	Tue 1/07	8:00AM-4:00...											
+ x	Wed 1/08	8:00AM-4:00...											
+ x	Thu 1/09	8:00AM-4:00...											
+ x	Fri 1/10	8:00AM-4:00...											
+ x	Sat 1/11												
+ x	Sun 1/12												

1. Can use the drop down and the calendar icon to change the time period view
2. The buttons allow you to refresh, save, and print out your timecard information

# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

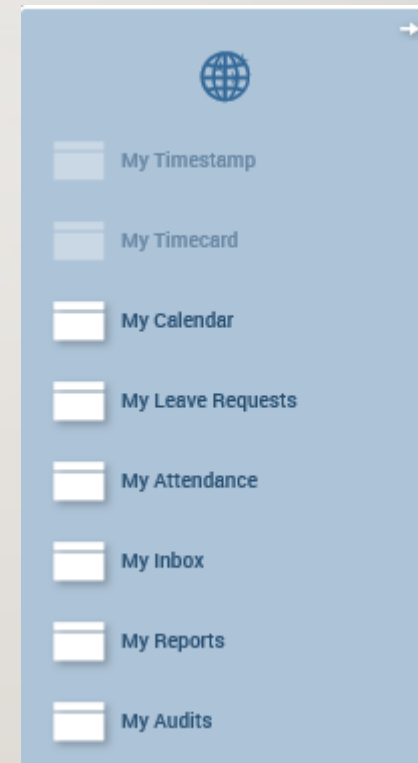
1. User information and log off
2. Last timestamp and transfer allows you to execute a transfer and record a punch
3. Related Items menu: Through related items you can access all the different widgets that interface has to offer, as you cycle through my information, manage my department, etc the related items menu will update
4. Search: Can provide help with any look up you're having trouble with

The screenshot displays the Kronos Navigator interface. The main dashboard is divided into two sections. The top section, labeled '1', contains user information: 'Timekeeper Persona' and 'Sign Out'. The bottom section, labeled '2', shows the 'My Timestamp' widget with a 'Last Timestamp' field and a 'Transfer' dropdown menu. A 'Record Timestamp' button is also present. The right sidebar, labeled '3', lists various widgets: 'My Timestamp', 'My Timecard', 'My Calendar', 'My Leave Requests', 'My Attendance', 'My Inbox', 'My Reports', and 'My Audits'. A search icon is located at the top of the sidebar. A modal window, labeled '4', is open on the right, titled 'Transfer'. It contains fields for 'Job', 'Labor Account', and 'Work Rule'. Below these are tabs for 'Job Transfer', 'Labor Account', and 'Work Rule'. The 'Add Labor Account' section includes dropdowns for 'Agency-Dept...', 'Location', 'Combo Code', and 'Override Reas...'. There are also input fields for 'Employee ID-E...', 'Supervisor', and 'Job'. A 'Clear All' button is at the top right of the modal, and 'Cancel' and 'Apply' buttons are at the bottom right.

# GETTING STARTED –VIEWING YOUR INFORMATION

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Through the related items menu on the right side of the screen you can access all your information



# GETTING STARTED –VIEWING YOUR INFORMATION

Through the My Calendar widget you can view your calendar and see your daily schedule as well as make requests for time off

My Calendar			
January 5 - 11, 2020			
Day	Week	Month	Visibility Filter Request Time Off
Sun 1/05		Mon 1/06	Tue 1/07
8:00AM		8:00AM-4:00PM [8.00 h] Regular	8:00AM-4:00PM [8.00 h] Regular
9:00AM			
10:00AM			
11:00AM			
12:00PM			
1:00PM			
2:00PM			
3:00PM			

# GETTING STARTED –VIEWING YOUR INFORMATION

Through the Request Time Off button in the My Calendar widget you can fill in start date, end date, pay code, and time unit.

You can also view your accrual bucket balances at the bottom of the screen in order to choose which pay code to use for your request, click **Submit** at the bottom when completed.

### Request Time Off

Type:
 

Time Off Request

		Start date	End date	Pay code	Time Unit	Start time	Daily Amount
<div>+</div>	<div>×</div>	1/07/2020	1/07/2020	Vacation	Full day		

Accruals on:
 

1/07/2020

Accrual	Balance
Bone Marrow Donor	56.0 Hour
Comp Time	0.0 Hour
Comp Time Holiday	0.0 Hour

Cancel

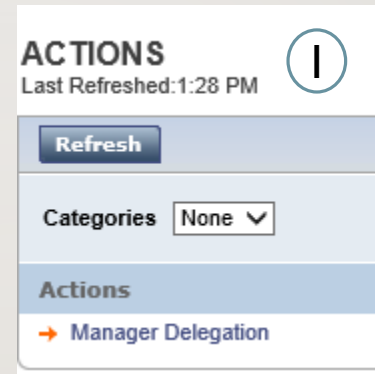
Submit

# GETTING STARTED –VIEWING YOUR INFORMATION

 My Attendance

Through the My Attendance widget you can see the actions available you

1. The only available action for timekeeper is Manager Delegation
2. After having clicked manager delegation, you choose the delegate, the timeframe, and the role you would like to delegate and then **Save & Close**



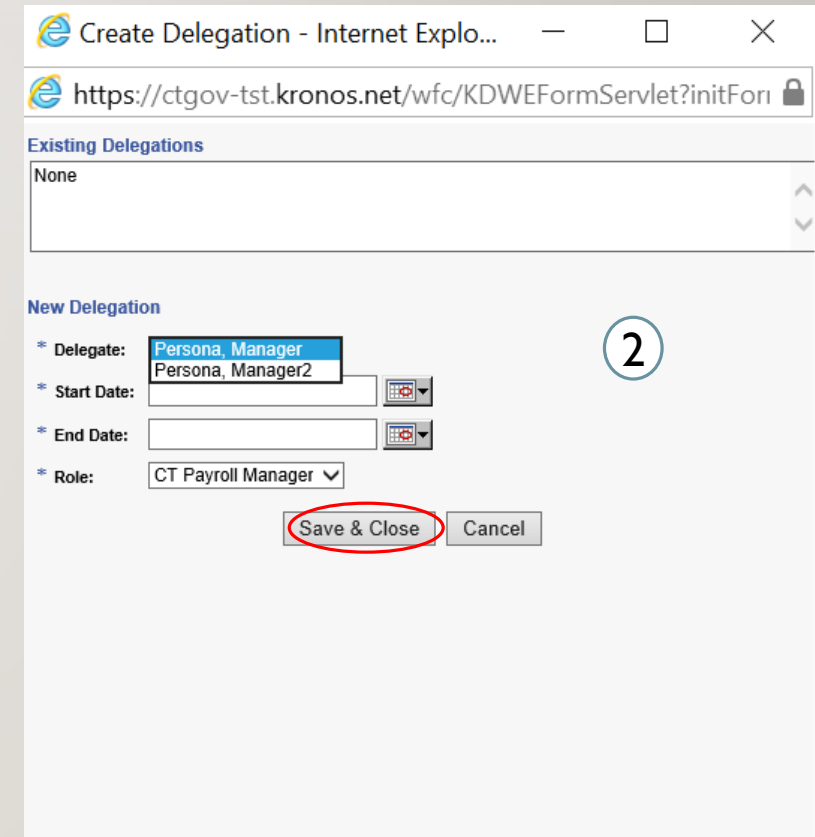
**ACTIONS** ⓘ  
Last Refreshed: 1:28 PM

**Refresh**

Categories

**Actions**

→ **Manager Delegation**



Create Delegation - Internet Explo...  
https://ctgov-tst.kronos.net/wfc/KDWEFormServlet?initFor...

**Existing Delegations**

None

**New Delegation** ⓘ

\* Delegate:   
Persona, Manager2

\* Start Date:

\* End Date:

\* Role:

**Save & Close** Cancel




# GETTING STARTED –VIEWING YOUR INFORMATION

- Through the My Inbox widget you can see all your tasks and messages
- Tasks are things you need to do or have started but not completed, in this case a manager delegation form I began on the previous slide and did not complete
- Messages can be notifications from supervisors or updates about timecards/requests

**INBOX**  
Last Refreshed: 1:35 PM

**TASKS** | **MESSAGES**

**Edit** → **Reassign** → **Refresh**

Status: **Active** ▼ As of Date: **12/08/2019**  Categories: **All** ▼

From	Subject
Persona, Timekeeper	Manager Delegation, Request Form

# GETTING STARTED –VIEWING YOUR INFORMATION

1. In the My Reports widget Schedule and Time Detail can be viewed by selecting the report and the Time Period and click **View Report**
2. To view My Accrual Balances and Projections select the report and fill in the As Of date then click **View Report**

1

My Reports

REPORTS Name: Persona, Timekeeper

View Report Primary Account

AVAILABLE REPORTS

Schedule Time Detail

Time Period Current Pay Period

Schedule Description Displays an employee

My Accrual Balances and Projections

2

My Reports

REPORTS Name: Persona, Timekeeper

View Report Primary Account

AVAILABLE REPORTS

Schedule Time Detail

Time Period Specific Date

My Accrual Balances and Projections

As Of

# GETTING STARTED –VIEWING YOUR INFORMATION

Through the My Audits widget you can view different actions such as punching in as shown on the right, or all the categories listed on the drop down

My Audits

Category:

My Audits

My Audits
My Comments
My Overtime Requests
My Signoff and Approval
My Moved Amounts
My After Sign-Off Audits
My Corrections
My Activity Event Audits

Type of Edit:

Punch (Add/Edit/Delete)

Time	Type	Account
52PM	Add Punch	

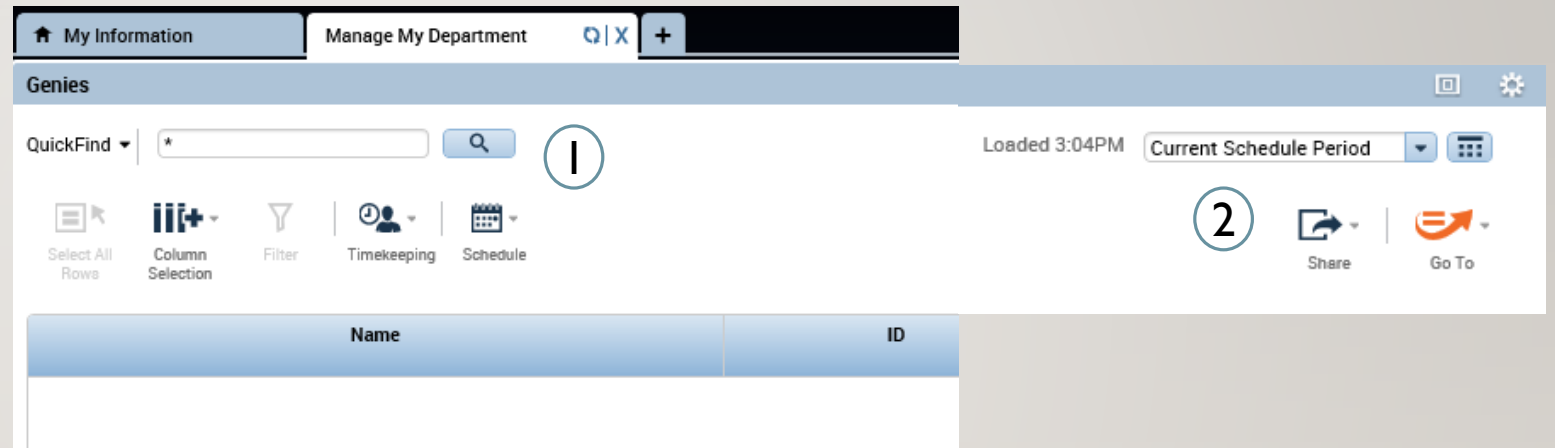
# FINDING YOUR TEAM

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# FINDING YOUR TEAM – SEARCHING FOR AN EMPLOYEE

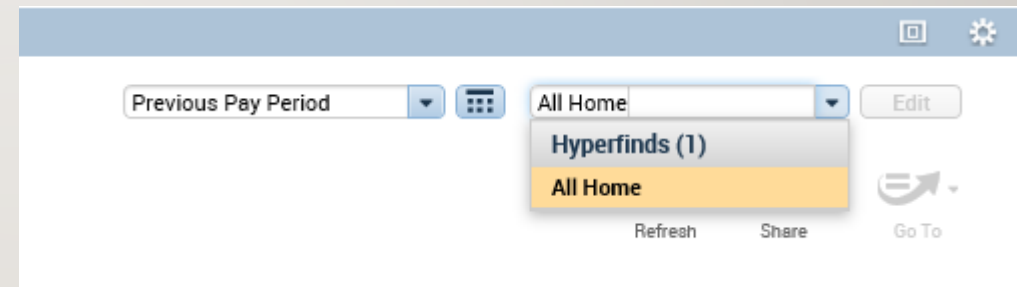
1. Under the Manage My Department interface use the default QuickFind Genie and search for your employee. Type in the name of your employee or begin the search with '\*' to search employees with their named ending in the following letters, end your search with '\*' to find employees whose names start with the entered letters. Searching '\*' will return every employee
2. This area allows you to change the desired timeframe, or share the employee information by exporting it to excel or csv. Go To allows you to select an employee and transition to the different Management widgets that will covered



# FINDING YOUR TEAM – WORKING WITH HYPERFINDS

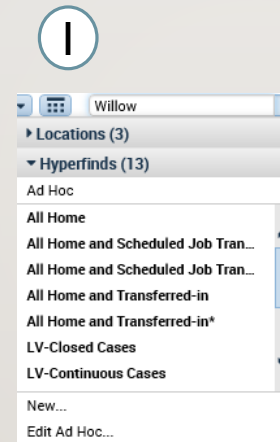
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- I. Under the certain widgets or genies you'll see the second drop down next to the timeframe selection. Using this drop down you can select standard hyperfinds that will help you simplify your search.



# SCHEDULING –FINDING YOUR TEAM HYPERFIND

1. Under the locations drop down will be a list of hyperfinds, select the New button to create a new Hyperfind.
2. Select whether you want the Hyperfind to be public or private or ad hoc which is one that is available to everyone that can only be edited
3. Choose by what criteria you want to narrow down your employees whether it be timekeeper, attendance, etc and open their dropdown.
4. Choose whether you want your Hyperfind to include or exclude employees then fill in the dates and the specifics of what you want to search with, tap **Save As** to complete the hyperfind creation.



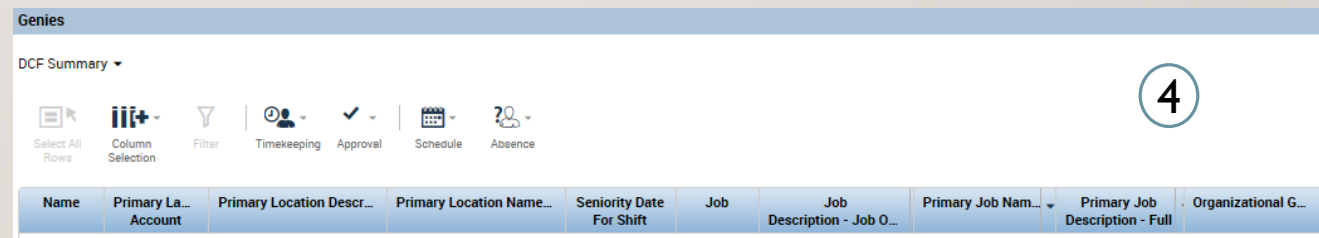
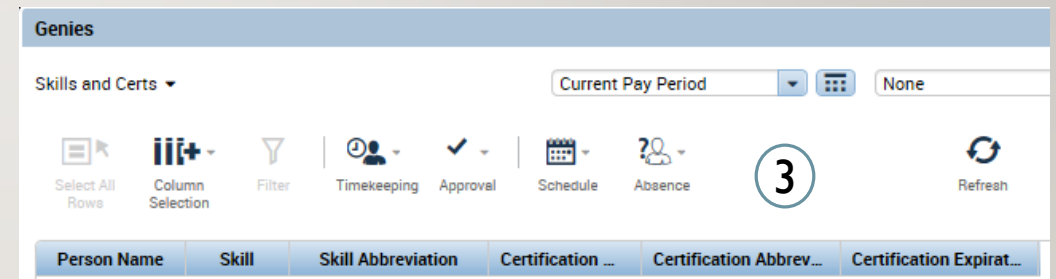
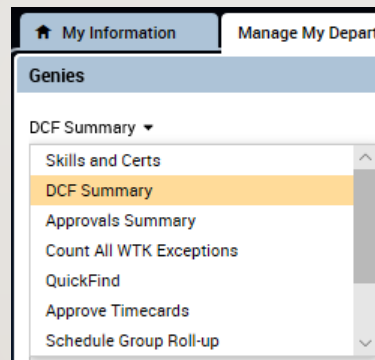
A screenshot of the 'HYPERFIND QUERIES' screen. The screen has a top bar with 'Visibility' set to 'Public' and a 'Query Name' field. Below this is a 'Filter' section with a dropdown menu showing 'Public', 'Personal', and 'Ad Hoc'. The 'Public' option is selected and highlighted with a red circle and the number 2. To the right of the filter is a 'NAME OR ID' section with a 'Search by' dropdown set to 'By Last Name' and a 'Search' button. Below this is a 'Choose Specific People' section with a 'Search for' field and a 'Search' button. To the right of the search field is a 'Selected Items' section. At the bottom of the screen, there is a 'Selected Conditions' section with 'Add', 'Update', and 'Delete' buttons. The 'Save As' button at the bottom right is highlighted with a red circle and the number 4. The 'New...' button in the filter section is highlighted with a red circle and the number 3.

# FINDING YOUR TEAM – EXERCISE I

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# FINDING YOUR TEAM – WORKING WITH GENIES

1. Under Genies you will see the drop down for all the available searches you can use
2. The two most useful will be Skills and Certs and DCF Summary
3. Skills and Certs will give you a summary of every skill and certification based on the selection of people you have chosen
4. DCF Summary gives you a summary for each employee including their labor account, location, and seniority date for shift



# TIMECARDS

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# TIMECARDS – EDITING PUNCHES

1. Using the QuickFind Genie under Manage My Department search for the employee you want to see, then double click their name to open their timecard
2. Once in the timecard you can adjust the view change the timeframe and begin editing

My Information

Manage My Department

Schedules

Timecards

+

Genies

QuickFind

\*lopez, steven

🔍

1

Select All Rows

Column Selection

Filter

Timekeeping

Schedule

Name	ID	
Lopez, Steven	200037	Sample/-/-/-/-/-/-/-/-

Timecards

Lopez, Steven

1 of 1

200037

2

View

		Date	Schedule	Pay Code	Amount
+	×	Fri 1/03			
+	×	Sat 1/04			
+	×	Sun 1/05			
+	×	Mon 1/06			
+	×	Tue 1/07			

# TIMECARDS – EDITING PUNCHES

1. Once in the timecard, exceptions will be highlighted such as a missed in/out punch as shown on the right
2. Select the desired cell and enter the corrected time, hover over any exception to get an explanation of what the exception is

Timecards

Lopez, Steven

1 of 1

200037

View

		Date	Schedule	Pay Code	Amount	In	Transfer	Out
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Fri 1/03				<div><div></div>8:00AM</div>		
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Sat 1/04						
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Sun 1/05						
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Mon 1/06				<div><div></div>8:00AM</div>		12:00PM

# TIMECARDS – ADDING COMMENTS

1. By default entered time will follow the Pay Rule that has been assigned to you and you will not need to enter pay codes for regular time/OT/ or Holidays
2. Once you select **Comments** choose Explanation from the drop down and then add the desired comment

The image shows two screenshots from a timecard application. The top screenshot is the 'Punch Actions' dialog box, which is open over a timecard grid. The grid shows an 'In' punch at 8:00AM. The 'Punch Actions' dialog box contains fields for Date (1/03/2020), Time (8:00AM), Rounded Time (1/03/2020 8:00AM GMT-05:00), Override (In Punch), Time Zone ((GMT -05:00) Eastern Time (USA; Canada)), Exceptions (Unscheduled), Last Edit Date (1/08/2020), and Edit Made By (Persons, Timekeeper). At the bottom of the dialog box, there are four icons: 'Mark As Reviewed' (checkmark), 'Edit' (pencil), 'Comments' (speech bubble, circled in red), and 'Justify Exception' (star). The bottom screenshot is the 'Comment' dialog box, which is open. It has a title bar 'Comment' and a section 'Comments (1)'. Inside, there is a dropdown menu labeled 'Explanation' and a text input field labeled 'Type a note (optional)'. Below the input field is a link 'Add another note' and an 'Add' button. At the bottom of the dialog box are 'Cancel' and 'OK' buttons. A circled '2' is placed next to the 'Comments (1)' section header.

# TIMECARDS — EXERCISE 2

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – EDITING PAY CODES

1. By default entered time will follow the Pay Rule that has been assigned to you and you will not need to enter pay codes for regular time/OT/ or Holidays
2. Pay codes will need to be entered for exceptional situations such as the employee being unable to submit a leave/time off request. In the example on the right there was a delayed entry so you would enter the employee timecards and set the delayed time by entering the Amount and selecting Governor Granted Time Off

Genies

QuickFind ▾ \*Lopez, steven 🔍

Select All Rows Column Selection Filter Timekeeping Schedule





Name	ID ▲	Primary Labor Account	Pay Rule
Lopez, Steven	200037	Sample/-/-/-/-/-/-	02 FT NSD STD 8

		Date	Schedule	Pay Code	Amount
+	×	Fri 1/03			
+	×	Sat 1/04		2	
+	×	Sun 1/05			
+	×	Mon 1/06			
+	×	Tue 1/07		Governor Granted Ti...	2.0

# TIMECARDS – ADDING ROWS

1. Click on the '+' to add a new row to a day.  
This can be done if an employee took a couple hours off or if there's a delayed entry. Pay codes and regular scheduled hours need to be entered on different rows.

1

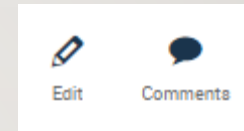
		Tue 1/07		Governor Granted Ti...	2.0
					

2. Once you enter the pay code for the time off and the regular hours worked the time will be automatically compiled on the right, you can see the sum of hours under the Daily column.

2

Shift	Daily
8.5	8.5
6.0	8.0

# TIMECARDS – OVERRIDES AND CANCELLATIONS



1. Right clicking on a punch and selecting Edit, allows you to set an override, such as setting a new shift or adding a break
2. You can also cancel deductions, in scenarios where employees did not take a lunch because they had to continue working as shown here

**Punch**

Date: 11/04/2019

Time (h:mm) \*: 7:00AM

Rounded Time: 11/04/2019 7:00AM GMT-05:00

Override: In Punch

Time Zone: <None>

Cancel Deduction: In Punch

Exceptions: New Shift

Comments: 30 Min Break Rule

45 Min Break Rule

60 Min Break Rule

**Punch**

Date: 11/04/2019

Time (h:mm) \*: 7:00AM

Rounded Time: 11/04/2019 7:00AM GMT-05:00

Override: In Punch

Time Zone: (GMT -05:00) Eastern Time (USA; Canada)

Cancel Deduction: Holiday Bonus AOC 0hrs

Exceptions: KGS Good Holiday Bonus 7.5hrs

Comments: Lunch Deduct 30 Min, 0 Hrs Work

Lunch Deduct 30 Min, 6 Hrs Work

Lunch Deduct 30 Min, Swap

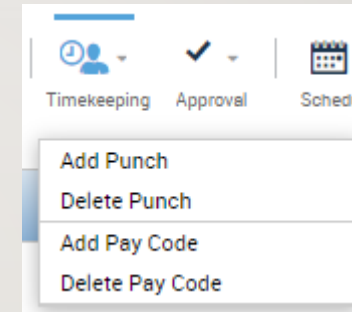
Lunch Deduct 45 Min, 0 Hrs Work

# TIMECARD — EXERCISE 3 & 4

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – GROUP EDITS

1. You also have options to add a punch or a pay code to a group of people
2. All you would need to do is select the employees you want to modify and choose then add in the punch or pay code. This can be useful in the LWGOV scenario to avoid having to manually add in every pay code



1

A screenshot of a software interface showing a table of employees. The table has two columns: 'Name' and 'ID'. The table contains four rows of data. Above the table, there is a 'QuickFind' search bar and a toolbar with icons for 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', 'Approval', and 'Schedule'. A circled '2' is placed to the right of the toolbar.

Name	ID
Bell, Morgan T	463595
Maldonado, Vanessa	481192
Munoz-Velazquez, Angel M	469835
Persona, Employee	003

# TIMECARD — EXERCISE 5 & 6

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – NEGATIVE PAY CODES

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Pay codes can also be used to edit accrual buckets. Rather than perform a whole reset after accidentally using a paycode, you can use a pay code with a negative value to add that time back to the accrual bucket

+	×	☰ Mon 5/11		Sick	-8.0
+	×		7:00AM-3:00PM		
+	×	Tue 5/12	7:00AM-3:00PM		
+	×	Wed 5/13	7:00AM-3:00PM		

# TIMECARDS – HOLIDAYS PAID ON A PASS DAY

1. Validate the correct holiday is being paid to the employee under **Totals**
2. If the employee is 3<sup>rd</sup> shift and needs to be paid on a pass day, use the pay code **Hol Comp Earned Pass Dy** 7HR, 7.5HR, 8HR

Totals	Accruals	Audits	Historical Corrections
Daily		Pay Code	
Pay Code	Amount	Wages	
Holiday	8:00	\$325.68	

		Date	Schedule	Pay Code	Amount
+	×	Sun 11/10			
+	×	Mon 11/11		Veteran's Day	8:00
+	×			Hol Comp Earned Pass Dy 8HR	8:00
+	×	Tue 11/12			

Totals	Accruals	Audits	Historical Corrections
All		Pay Code	
Pay Code			
Holiday Comp Earned on Pass Dy			

# TIMECARDS – HOLIDAYS 3<sup>RD</sup> SHIFT

1. When entering back to back shifts on a holiday, half the time will be sent to overtime automatically
2. In order to pay all the time to regular, a work rule transfer to the employee's regular pay rule will need to be set on the unscheduled shift
3. Use the troubleshooting slide to validate employee pay

Mon 11/11		Veteran's Day	0:00		
				3:00PM	10:59PM
	11:00PM-7:00AM			11:00PM	7:00AM

Totals	Accruals	Audits	Historical Corrections
Daily		Pay Code	
Pay Code	Amount	Wages	
Holiday Worked - Comp. Ear...	7:30	\$0.00	
Regular	7:30	\$0.00	
Shift Differential	7:30	\$0.00	
Unapproved Overtime	7:30	\$0.00	

			3:00PM	06 FT OT80 SDE	10:59PM
11:00PM-7:00AM			11:00PM		7:00AM

# TIMECARDS – MANUAL SHIFT DIFFERENTIAL

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In order to pay out shift differential you will need to manually enter it

Before the interface that does this automatically becomes active, you will need to use the **DCF Shift Diff TRCs by BU**

This needs to be looked at whenever entering a paycode or a leave case to verify the need for shift diff

Shift		Shift 1.5
TRCs		TRCs
CCAFc		CPN15
CCAFE		HPWC
CCB		HPWP



Tue 11/05		Shift Differential	8:00
		Vacation	8:00

# TIMECARD — EXERCISE 7

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – TRANSFERS

On the timecard between the in and out punches you can choose the transfer drop down, from there you can choose previously chosen work rules/labor accounts or search for an unused one

In	Transfer	Out
 8:00AM	 //DCF9111110001001	3:00PM 

**Transfer**

//DCF9111110001001

//DCF911111000100100

12 FT OT40 SDE3 DCF

Search...

**Transfer**

Name	Lopez, Steven		
Job			
Labor Account	/////		
Work Rule	12 FT OT40 SDE3 DCF		

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

**Add Labor Account** Clear All

Agency-Dept...	<input type="text"/>	Employee ID-E...	<input type="text"/>
Location:	<input type="text"/>	Supervisor:	<input type="text"/>
Combo Code:	<input type="text"/>	Job:	<input type="text"/>
Override Reas...	<input type="text"/>		

Cancel

Apply

# TIMECARD — EXERCISE 8

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – LABOR ACCOUNT TRANSFERS

Labor Account Transfer: this can be done if you are working at a different location for a day or working a different position you want to charge to that different location. In this window you will enter every piece of information that changed in the transfer.

If you are working a different job at a different agency under a different supervisor, every labor level would need to be entered.

### Transfer

Name	Lopez, Steven
Job	
Labor Account	/////
Work Rule	12 FT OT40 SDE3 DCF

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

#### Add Labor Account

Agency-Dept-...

Location:

Combo Code:

Override Reas...

Employee ID-E...

Supervisor:

Job:

Clear All

Cancel

Apply

# TIMECARD — EXERCISE 9

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS - WORK RULE TRANSFER

- Work rule transfer: You get called in and there's a different pay rule for being called in, you would do a work rule transfer and enter the pay rule that should be applied to you for that day
- An example of this is OT Double time, in order for an employee to receive that pay you must enter a work rule transfer for **Mandated OT** using the employee's pay rule

Transfer

Name	Lopez, Steven
Job	
Labor Account	//////
Work Rule	12 FT OT40 SDE3 DCF

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

Add Work Rule

01 EX

02a Civilian Managers

02b Sworn Managers

02 FT CT40 NSD

02 FT NSD

02 PT NSD

03 FT CT40 NSD

03 FT OT40 NSD

04 No OT NSD Other


05 NP-1 Holiday Not Required

10 FT OT40 SDE STD 7.5 MandOT  
10 FT OT40 SDE STD 7 MandOT  
10 FT OT7.5 NSD STD 7.5 MandOT

# TIMECARD — EXERCISE 10

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – TROUBLESHOOTING

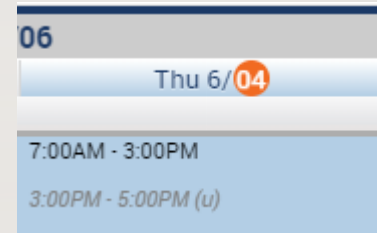
1. Select the day that you want to validate time entry for from the timecard
2. Open the totals section at the bottom using the arrow shown here 
3. Switch the view to daily and check how the hours are being paid in this case we see its being paid as all regular when two hours should be overtime

Thu 6/04	7:00AM-3:00PM			7:00AM	 5:00PM
----------	---------------	--	--	--------	--

Totals			Accruals	Audits	Historical Corrections
Daily		Pay Code			
Pay Code		Amount		Wages	
Regular		9:30		\$0.00	

# TIMECARDS – TROUBLESHOOTING

1. In order to correct this, navigate to the schedule planner and enter the overtime as an unavailable shift
2. Navigate back to the timecard and break up the time as shown on the right
3. Right click on the second in punch, select edit, and then enter a new shift override to break up the shifts



**Punch**

Date:	6/04/2020
Time (h:mma) *	<input type="text" value="3:01PM"/>
Rounded Time:	6/04/2020 3:01 PM GMT-04:00
Override:	<input type="text" value="New Shift"/>

# TIMECARDS – TROUBLESHOOTING

1. Once you add the override, your view will change to this, now you will need to approve the overtime
2. Right click on the day and select approve overtime, decide how much of the time you want to approve
3. Go back to the totals and validate that the day is paying correctly

①

Thu 6/04		7:00AM-3:00PM			7:00AM	3:00PM
					3:01PM	5:00PM

②

Overtime Date \* 6/04/2020 Clear

Unapproved Overtime Amount (HH:mm) \* 2:00

Amount \*

☒ All

☐ All Before Shift

☐ All After Shift

☐ None

☐ Some (HH:mm)

☐ Time Window

☒ Show Schedule

	From	Amount
Before Shift	7:00AM	0:00
After Shift	3:00PM	0:00

③

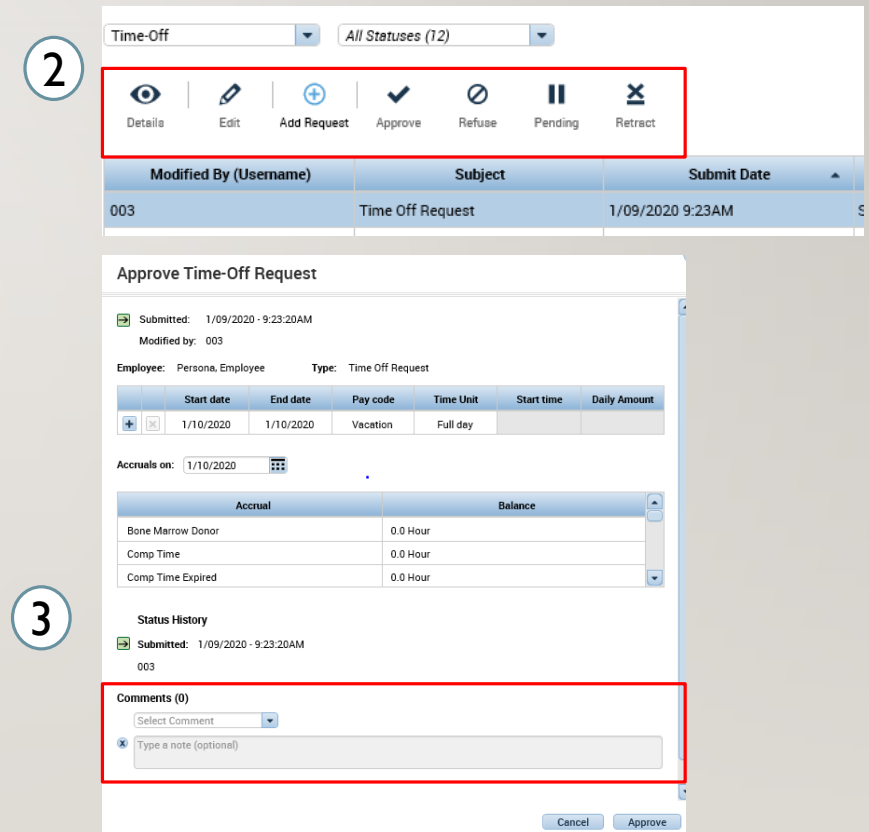
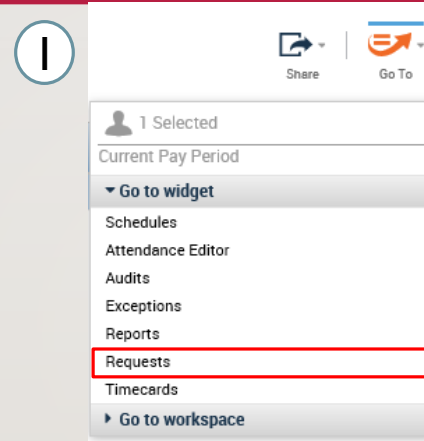
Totals	Accruals	Audits	Historical Corrections
Daily		Pay Code	
Pay Code	Amount	Wages	
Overtime at Time and O...	2:00	\$0.00	
Regular	7:30	\$0.00	

# TIMECARD — EXERCISE II

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIME OFF – REVIEWING TIME OFF REQUESTS

1. After finding the desired employee using the QuickFind, use the Go To button and select **Requests**
2. The following menu will appear with the options to **view, edit, approve, refuse, set as pending, and retract**.
3. Whichever item you choose will lead you to the following menu, where you can decide what to do with the request and then **add an optional comment** to explain the decision.



# TIME OFF — EXERCISE 12

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIME OFF – TIME OFF REPORT

1. Use the QuickFind to find the employee you want to make changes for. Use the Go To button to access **Reports**
2. Through the reports interface select the Accrual Detail report and select **Run Report**

The screenshot shows the 'Genies' interface. At the top, there's a 'QuickFind' search bar with the text '\*lopez' and a magnifying glass icon. Below the search bar are several icons: 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', and 'Schedule'. To the right of the search bar, there's a 'Go To' button circled with a '1'. Below the 'Go To' button is a list of options: 'Schedules', 'Attendance Editor', 'Audits', 'Exceptions', 'Reports', 'Requests', and 'Timecards'. The 'Reports' option is highlighted.

The screenshot shows the 'REPORTS' interface. At the top, there's a 'SELECT REPORTS' button and a 'CHECK REPORT STATUS' button. Below these are buttons for 'Run Report', 'Refresh', 'Create Favorite', 'Save Favorite', 'Duplicate Favorite', and 'Delete Favorite'. On the left, there's a list of reports: 'Absent Employees (Data)', 'Accrual Balances and Projections (Data)', 'Accrual Debit Activity Summary', 'Accrual Detail (Data)', 'Accruals (Spreadsheet Export)', 'Accrual Summary', 'Attendance Analysis', and 'Attendance Balances'. The 'Accrual Detail (Data)' report is selected and highlighted with a red box. On the right, there's a form for the 'ACCRUAL DETAIL (DATA)' report. It includes a 'Description' field, a 'People' dropdown menu set to 'Previously Selected Employee(s)', a 'Time Period' section with 'Range of Dates' and date pickers for '1/03/2020' and '1/16/2020', and an 'Output Format' dropdown menu set to 'Adobe Acrobat Document(.pdf)'. The 'Run Report' button is circled with a '2'.

# TIME OFF – TIME OFF REPORT

1. Switch to the Check Report Status tab and select the Accrual Detail report. Select the appropriate report and press View Report.
2. The report will download and show you all your accrual information

### REPORTS

SELECT REPORTS

CHECK REPORT STATUS

View Report

Refresh Status

Delete

Name

Search

Report Name	Format
Accruals (Spreadsheet Export)	xlsx
Accrual Detail (Data)	pdf
Accrual Detail (Data)	pdf
Accrual Debit Activity Summary	pdf

Accruals (Spreadsheet Export)

Executed On: 1/09/2020 9:55AM

Data Up to Date: 1/09/2020 9:55AM

Printed For: 006

Time Period: 1/03/2020 - 1/16/2020

Untotalized Employee Count: 0

Employee	Reporting Period		Accrual Code		
Name	Start Date	End Date	Name	Unit	Opening Balance
Persona, Employee	1/01/2020	12/31/2020	Bone Marrow Donor	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Expired	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Holiday	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Holiday Expired	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-CTFMLA	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-CTFMLAMIL	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-FMLA	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-FMLAMIL	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-Tracking	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Military Leave Active Duty	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Military Leave Training	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Olympics	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Organ Donor	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Personal	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Red Cross	Hour	0.0

# TIME OFF — EXERCISE 13

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT



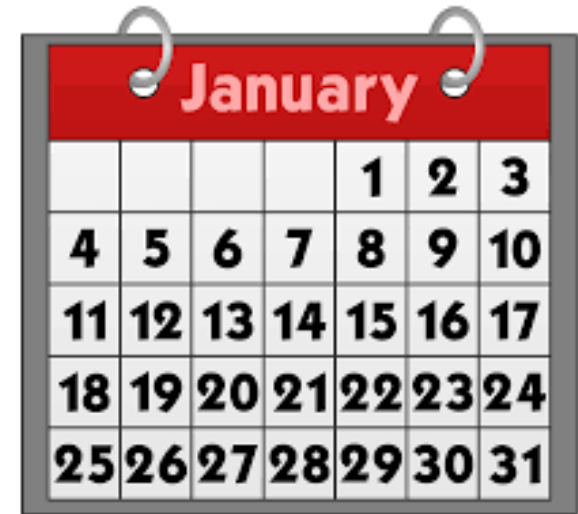
**10 MINUTE BREAK**

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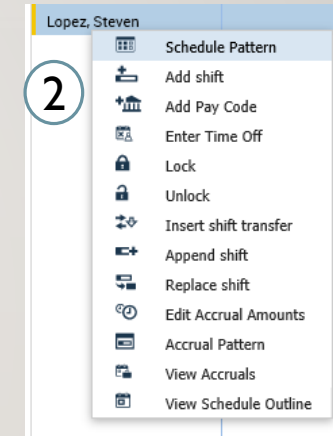
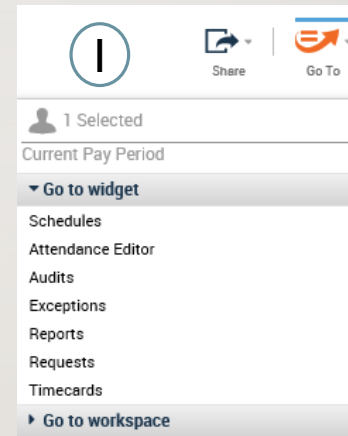
# SCHEDULING

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# SCHEDULING – ADDING A SCHEDULE

1. After selecting an employee using the QuickFind, press the Go To button and select **Schedules**
2. Right click the name of the employee or one of the empty cells on the schedule and select Add shift. You can also left click on one of the cells and manually enter in a timeframe.
3. On the add shift window enter the type of shift, the date, the start time, and the end time. Select Apply to save your changes and add the shift to the schedule.

A screenshot of the 'Add Shift' form. The form has a header 'Add Shift' and a circled '3' next to it. Below the header, there are fields for 'Assigned to' (Lopez, Steven), 'Shift Details' (12:00am-1:00am(1.00h)), and 'Primary Job' (None). There is also a field for 'Repeat this shift for' (1 days). Below these fields is a table with columns: Start Date, Type, Start Time, End Time, End Date, Duration, Job Transfer, Labor Level Transfer, and Work Rule Transfer. The table has one row with the following values: 1/04/2020, Regular, 12:00am, 1:00am, 1/04/2020, 1.00, and empty cells for Job Transfer, Labor Level Transfer, and Work Rule Transfer. At the bottom of the form, there is a 'Comments (0) Add Comment' section and 'Cancel' and 'Apply' buttons.

# SCHEDULING – EDITING A SCHEDULE/TRANSFERS

1. Right click, and select **Edit Shift**. You can add multiple rows for different occurrences such as working a different position or going in on call. Add a row to add hours charged to a different job or hours that should be paid out differently than the pay rule assigned to you.
2. Perform a labor level transfer as previously done (slide 24) for working a different position or for working at a different location or perform a work rule transfer as previously shown (slide 24) for situations where your hours need to be paid out differently than they typically are due to bargaining unit rules.

### Edit Shift

Assigned to  
Lopez, Steven

Shift Details 10:00am-10:00am(0.00h)

Primary Job None

Insert Template ▾

Shift Label

Repeat this shift for days

		Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	×	1/03/2020	Regular	10:00am	4:00pm	1/03/2020	6.00			
+	×	1/03/2020	Regular	8:00am	10:00am	1/03/2020	2.00			

1

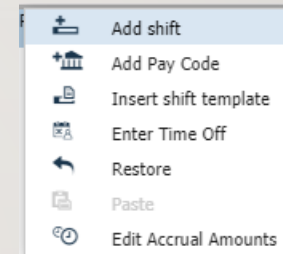
Comments (0) [Add Comment](#)

Cancel

Apply

# SCHEDULING – EDITING A SCHEDULE/PAY CODES

1. Right click on the day and select **Add Pay Code**
2. From the pay code window you can select how much of the shift you want to add a pay code for, whether you want to override the shift, what pay code you want, and you have the option to attach a comment



**Add Pay Code**

Assigned to  
Lopez, Steven

Effective Date:\* 6/08/2020

Pay Code:\* Administrative Leave Paid

Amount (HH:mm):\* Full sched day

☐ Override Accrual Days:

☒ Override Shift

☒ Whole Shift ☐ Partial Shift

Start Time:\* 7:00AM

Repeat for: 1 days

Transfer Job:

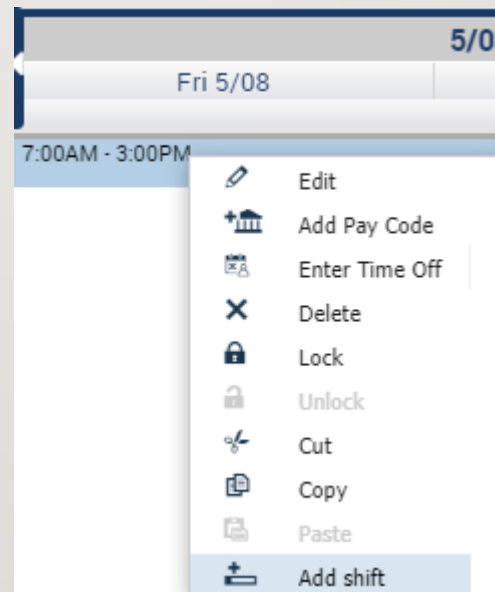
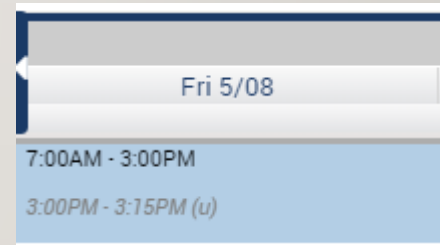
Transfer Labor Level:

Comments (0) [Add Comment](#)

# SCHEDULING – ADDING A SHIFT/UNAVAILABLE TIME

1. Rather than add a complete schedule pattern you have the option to insert a single shift. Right click on the day you want to add the shift and select **Add shift**
2. For any time that an employee works outside of their scheduled time it needs to be entered as **unavailable**, the system will use this to break up the employees punches and distribute OT and shift differential

		Start Date	Type	Start Time	End Time	End Date	Duration
+	x	5/08/2020	Unavailable	3:00pm	3:15pm	5/08/2020	0.25

# SCHEDULING – EDITING A SCHEDULE – OFF TIME

1. Time that is not scheduled and needs to have a work rule transfer must use Off Time
2. For employees to be paid correctly, all time and work rules should be entered and scheduled before hand. If the employee is going to be using a work rule or labor account transfer such as when they get On Call, you would need to use Off Time.

1

The screenshot shows the 'Add Shift' form. At the top, it says 'Add Shift'. Below that, 'Assigned to' is set to 'Lopez, Steven'. To the right, 'Shift Details' shows '4:00am-7:00am(3:00h)' and 'Primary'. Below this, there is an 'Insert Template' dropdown and a 'Shift Label' input field. At the bottom, there is a table with columns: Start Date, Type, Start Time, End Time, End Date, and Duration. The table contains one row for '7/01/2020' with 'Off' type, '4:00am' start time, '7:00am' end time, '7/01/2020' end date, and '3:00' duration. There are also '+' and 'x' icons in the first two columns of the table.

Start Date	Type	Start Time	End Time	End Date	Duration
7/01/2020	Off	4:00am	7:00am	7/01/2020	3:00

2

The screenshot shows a shift selection menu for 'Wed 7/01'. It lists three shift options: '4:00AM - 7:00AM (o)', '7:00AM - 3:00PM', and '3:00PM - 11:00PM'. The first option is highlighted with a blue background.

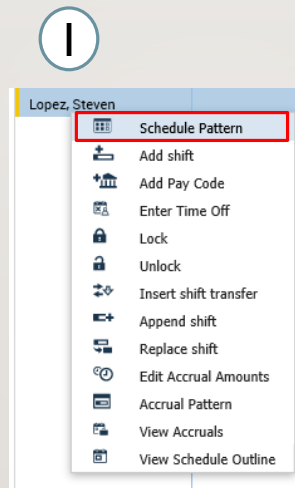
Shift
4:00AM - 7:00AM (o)
7:00AM - 3:00PM
3:00PM - 11:00PM

# SCHEDULES — EXERCISE 14

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# SCHEDULING – ADDING A SCHEDULE PATTERN

1. If instead of selecting insert a shift you select **Schedule Pattern**, you can create a schedule for an employee for these desired period of time and choose how often it would repeat. Start your pattern on a Friday since pay periods start on Fridays.
2. Fill in the anchor date which is the day the pattern begins and should be on a Friday due to the pay period. Then select the start date and the end date or check in the bubble for making the pattern repeat forever. After that you have the option to define the pattern for multiple weeks or for a certain amount of days and then you would fill in the desired schedules. If the employee has previous schedules on their account fill in the override other patterns button. Click Apply to save your changes.



A screenshot of the 'Schedule Pattern' configuration form. A circled number '2' is in the top right corner. The form includes the following sections:

- Assigned to:** Lopez, Steven Primary job None
- Table Headers:** Start Date, End Date, Duration, Rotation
- Add Pattern:** Anchor Date: 1/03/2020, Start Date: 1/03/2020, End Date: (empty), Clear button.
- Frequency:** Forever (selected), Define Pattern for: 1, Week(s), Day(s).
- Buttons:** Add Shift, Add Pay Code, Shift Template, Pattern Template, Items in rotation (dropdown), Find.
- Table:** A table with columns for days of the week and rows for pattern entries.
- Buttons:** Cancel, Apply.

	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
+	1							
+	2							

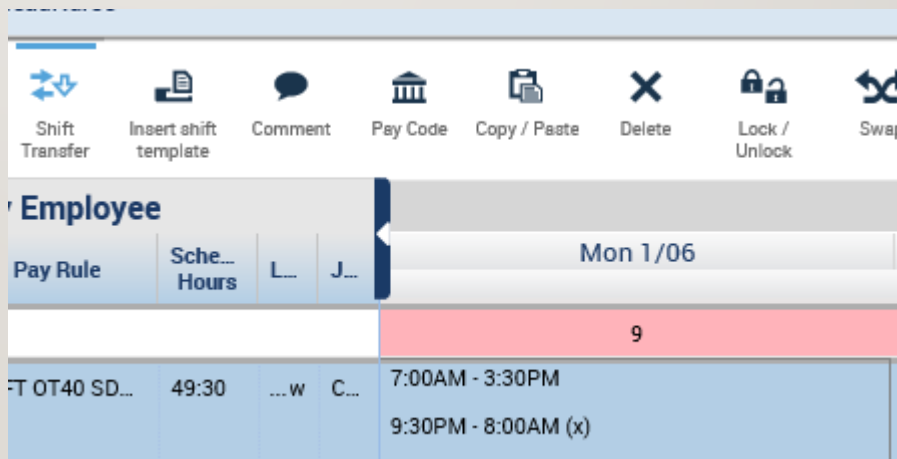
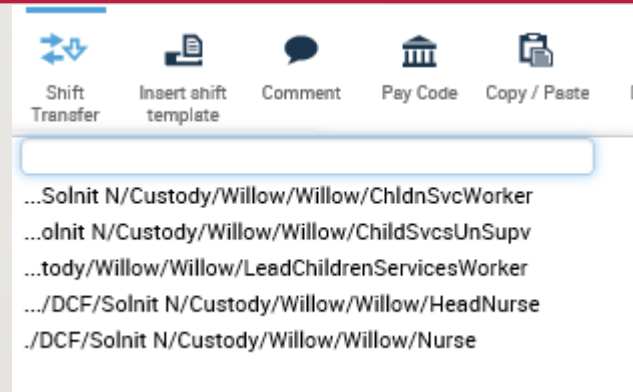
# SCHEDULES — EXERCISE 15

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# SCHEDULING – SHIFT TRANSFER

1. Tap the Shift Transfer button and it will show all available Transfer positions that you are eligible for
2. Click on the desired position, then click on the desired schedule you want to transfer. Once clicked the schedule will get an (x) next to it then click shift transfer again to stop transferring. If you hover over that scheduled time you will see the transfer you initiated.

1



2





# ADVANCED SCHEDULING













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# SCHEDULING – ORG CHART

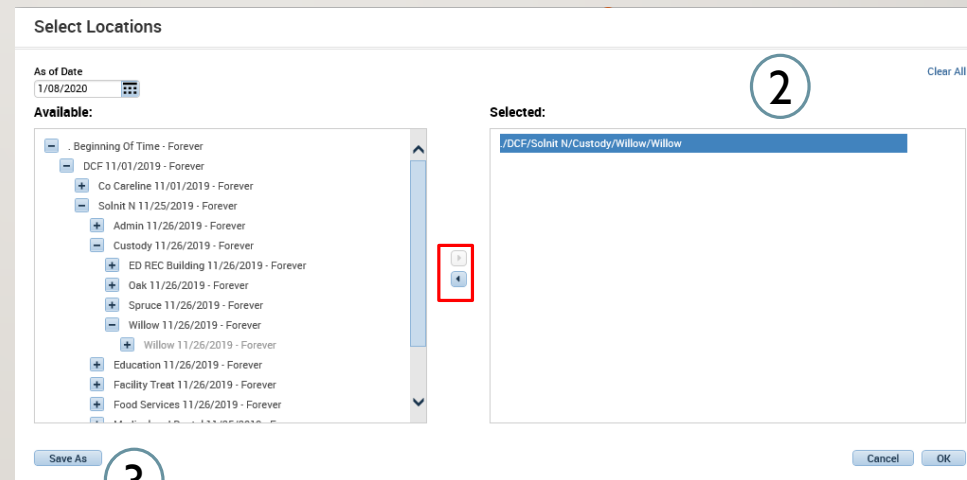
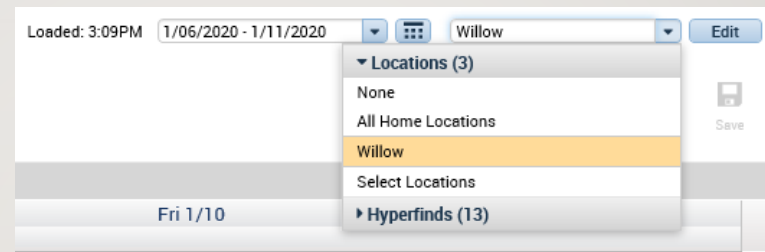
- I. This is the organizational map that you will be using for Advanced Scheduler

As Of Date  2/05/2020  Go To

-  Beginning Of Time - Forever
  -  DCF-DCF91000 2/01/2020 - Forever
    -  Co Careline 2/01/2020 - Forever
    -  Solnit N 2/01/2020 - Forever
    -  Solnit S 2/01/2020 - Forever
      -  Admin 2/01/2020 - Forever
      -  Custody 2/01/2020 - Forever
      -  Facility Treatment 2/01/2020 - Forever
      -  Medical and Dental 2/01/2020 - Forever
      -  Recreation 2/01/2020 - Forever
        -  Building 8 2/01/2020 - Forever
          -  Recreation 2/01/2020 - Forever
      - Repair and Maintenance 2/01/2020 - Forever

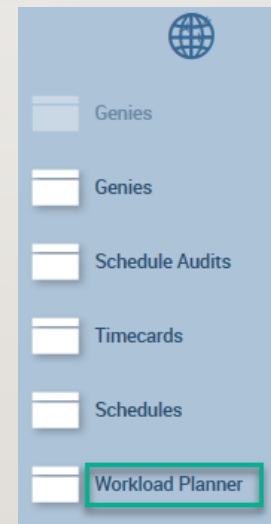
# SCHEDULING –FINDING YOUR TEAM LOCATION

1. On the Schedules Widget click on the Locations dropdown and press select locations
2. This will get you to a window with every location, run through the drop down and select the desired location, in this case Willow at Solnit N, then use the **arrows in the middle** to move that to your Selected locations
3. Use the Save As button to save your selected location with a custom name so that it will appear in the drop down



# SCHEDULING – WORKLOAD PLANNER

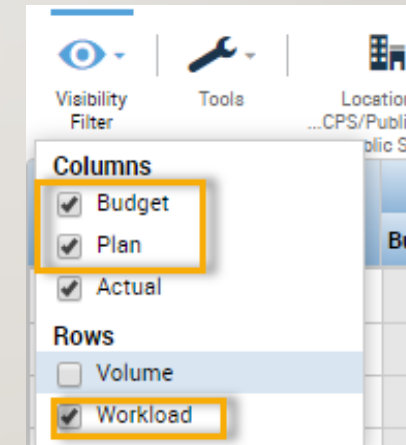
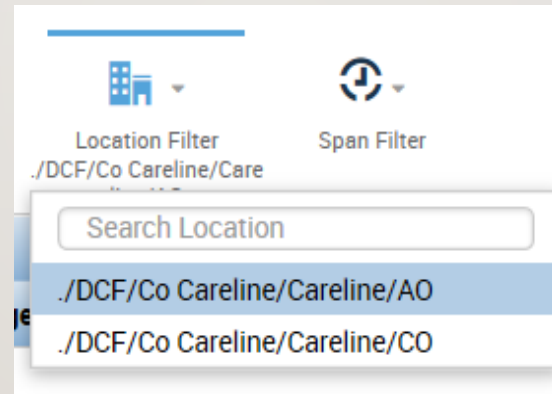
- Your staffing requirements are referred to as workload requirements in Workforce Scheduler and are stored in the Workload Planner. A Budget Workload is defined for each department. Then, when or if your staffing needs change, you can make adjustments in the Workload Planner.



Mon 12/02			Tue 12/03		
Budg...	Plan	Actual	Budg...	Plan	Actual
2	2		2	2	
2	2		3	3	
1	1		2	2	
1	1		1	1	







# SCHEDULING – WORKLOAD PLANNER

1. After selecting your location, your default view will be the Budget, Plan, and Actual columns with the Volume and Workload rows
2. The most convenient view is that of **Budget** and **Plan** columns and the **Workload** row



# SCHEDULING – WORKLOAD PLANNER

Columns can be updated today and in the future only. Budgets are usually updated once a year and Plans can be adjusted as needed

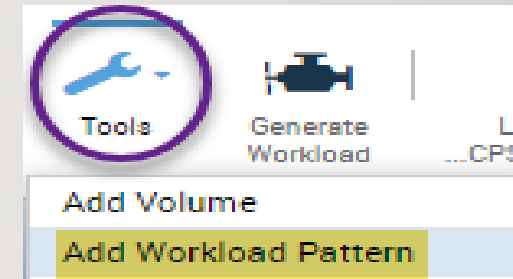
Workload Planner									
Workload and Volume					Loaded: 9:46PM	Current Schedule Period		Careline	
 View By	 Visibility Filter	 Tools	 Generate Workload	 Location Filter /DCF/Co Careline/Careline/CO	 Span Filter				
Job	Span	Type		Mon 1/20	Tue 1/21	Wed 1/22	Thu 1/23	Fri 1/24	Sat 1/25
				Budget	Budget	Budget	Budget	Budget	Budget
ProcessingTe...	Careline SW First	Workload		1	1	1	1	1	1
ProcessingTe...	Careline SW Se...	Workload							
ProcessingTe...	Careline SW Thi...	Workload							
SocialWorkSup	Careline SW First	Workload		3	3	3	3	3	2
SocialWorkSup	Careline SW Se...	Workload		2	2	2	2	3	2
SocialWorkSup	Careline SW Thi...	Workload							
SW-SoclHuma...	Careline SW First	Workload		22	22	22	22	22	5
SW-SoclHuma...	Careline SW Se...	Workload		8	8	9	8	9	6

# ADVANCED SCHEDULING – EXERCISE 16

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# SCHEDULING – WORKLOAD PLANNER PATTERNS

1. To create a pattern of your workload use the Tools button and select **Add Workload Pattern**
2. Patterns allow you to automatically enter workloads for the future if your budgets don't frequently change



Workload Pattern

Location : ./DCF/Co Careline/Careline/CO

Start Date	End Date	Type
1/20/2020	1/02/2021	Budget

Edit Pattern

Start Date : \* 1/20/2020 End Date : \* 1/02/2021 ☐ Save as plan  
☐ Forever

Job	Span	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Holiday
SocialWorks...	Careline SW ...	2	3	3	3	3	3	2	2
	Careline SW ...	2	2	2	2	2	3	2	2
	Careline SW ...								
SW-SocliHum...	Careline SW ...	5	22	22	22	22	22	5	
	Careline SW ...	6	8	8	9	8	9	6	

Cancel Apply



# SCHEDULING – WORKLOAD PLANNER PATTERNS

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1. Highlight the pattern you previously created and click on **Copy Pattern**
2. Create a new start date (today or in the future) make the desired changes and click apply
3. Any previous pattern will be end dated to coincide with the new start date you chose

Workload Pattern

Location : Boston Med/BMC/BMCPs/Public Safety/Public Safety

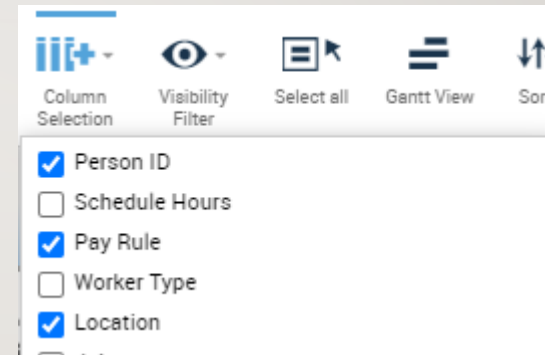
	Start Date	End Date	Type
 	11/05/2019	5/31/2020	Budget

# ADVANCED SCHEDULING— EXERCISE 17

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# SCHEDULING – COLUMN SETS

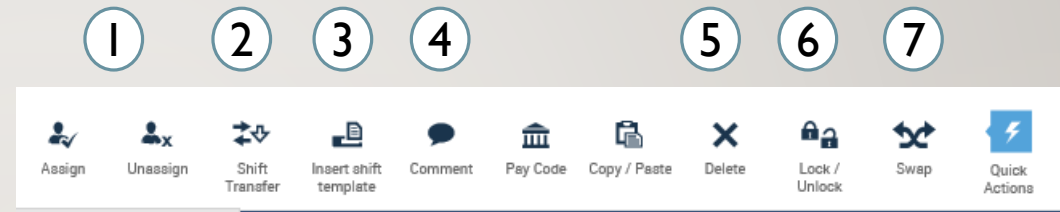
Column sets will allow you to change your view. This will help you when scheduling if you want to do so by seniority, or MOT/VOT date having both in the view would help you greatly



By Employee				Fri 6/05	
Name	Person ID	Pay Rule	Location		
Open Shifts[2] ▶					
Agli, Denise L	468584	10 PT OT8 OT80 ...	...ly/Building 8/Manhasset		
Ahmed, Jafreen	454596	11 PT OT8 OT40 ...	...ting 8/Adolescent Health		
Avila, Brenda L	479658	Test	... /Co Careline/Careline/CO	1:30PM - 10:30PM	
Ballestas, Eilee...	628390	12 FT OT80 SDE ...	... /Co Careline/Careline/CO	2:00PM - 10:30PM	
Banks, Alshlon L	592152	12 FT OT80 SDE ...	... /Co Careline/Careline/CO		

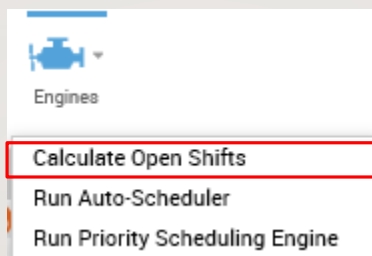
# SCHEDULING – QUICK ACTIONS

1. **Assign/Unassign:** allows you to assign/unassign employees to an open shift
2. **Shift Transfer:** Allows you to change request a shift change with a specific employee
3. **Insert shift template:** If there are preselected shift schedules, choose one and paste it to any desired cell
4. **Comment:** Add explanation to a change made or to a selected schedule
5. **Delete:** Remove a schedule from a cell
6. **Lock and Unlock:** Allows you to make a schedule uneditable
7. **Swap:** Select two scheduled cells and swap the information in them



# SCHEDULING – ASSIGNING/UNASSIGNING A SHIFT

1. Open shifts will appear above each day and can be expanded to show specifics by clicking on the red bar. If no open shifts currently appear for your employees you can press the Engines button, and press **calculate open shifts**.
2. Click on the **cell** of an employee shift, then tap the **Assign/Unassign** buttons, this will then show you the list of open shifts and select the shift you want to assign to that employee.



1

A screenshot of a software interface titled 'Schedules'. It shows a table with columns for 'Name', 'Pay Rule', 'Sche... Hours', and 'L... J...'. The table is filtered by 'Mon 1/06' and 'Tue 1/07'. The table shows a list of employees and their shifts. The first row is highlighted in red.

Name	Pay Rule	Sche... Hours	L... J...
Anderson, Mar...	12 FT OT40 SD...	48:00	...w C...
DeMaria, Debbie	01 EX NSD STD 8	0:00	...w C...
McKeown, Brian	02 FT NSD STD 8	0:00	...w C...
McKoy, Samuel	02 FT NSD STD 8	0:00	...w C...
Nolasco, John	02 FT NSD STD 8	0:00	...w C...
Unit Test, N Sc...	12 FT OT40 SD...	0:00	...w C...
Unit Test, N Sc...	12 FT OT40 SD...	0:00	...w C...

2

A screenshot of a software interface titled 'Assign'. It shows a table with columns for 'Name', 'Pay Rule', 'Sche... Hours', and 'L... J...'. The table is filtered by 'Mon 1/06'. The table shows a list of open shifts. The first row is highlighted in red.

Name	Pay Rule	Sche... Hours	L... J...
...ldnSvcWorker/.		280:30	...w C...
...ldSvcUnSupv/.		51:00	...w C...
Anderson, Mar...	12 FT OT40 SD...	48:00	...w C...
DeMaria, Debbie	01 EX NSD STD 8	0:00	...w C...

# SCHEDULING –VIEWING SHIFT ASSIGNMENTS

---

1. Open the menu at the bottom and select the Daily Coverage tab
2. Choose the view you prefer and the job and time schedule, the interface will show you how many employees have been assigned each day for the selected shift

Staffing Assistant   Coverage <b>Daily Coverage</b> Metrics   Rule Violations			
View	Counts ▾	Job	Custody/Willow/Willow/ChldnSvcWorker ▾
Time Span		7a-330p ▾	
7a-330p		0/6	0/8

# SCHEDULING – SHIFT TEMPLATES

1. Right click on the associate's name and select **Scheduling Pattern**
2. Select Pattern Template and fill in the anchor date, start date, and the end date or box
3. Select **Apply**

By Employee	
Name	Location
Open Shifts	
Astiasaran, Kri...	... )/Solnit S/Custody/Buil
Ortiz, Karen	... )/Solnit S/Custody/Buil
Rau, [icon]	/Buil
Availability	

### Schedule Pattern

Assigned to  
Ortiz, Karen Primary job [/DCF-DCF91000/Solnit S/Custody/Building 8/Sachem/CSW]

	Start Date	End Date	Duration	Rotation
	2/09/2020	Forever	2 weeks	2 Weeks:7a - 330p(Sun,Tue,Wed,Thu,Fri,Mon,Tue,Wed,Thu,Sat)

#### Edit Pattern

Anchor Date:\*  Start Date:\*  End Date:\*  [Clear](#)

Define Pattern for:\*  ☒ Week(s) ☐ Day(s) ☐ Override Other Patterns

[Add Shift](#) | [Add Pay Code](#) | [Shift Template](#) | [Pattern Template](#)  [Find](#)

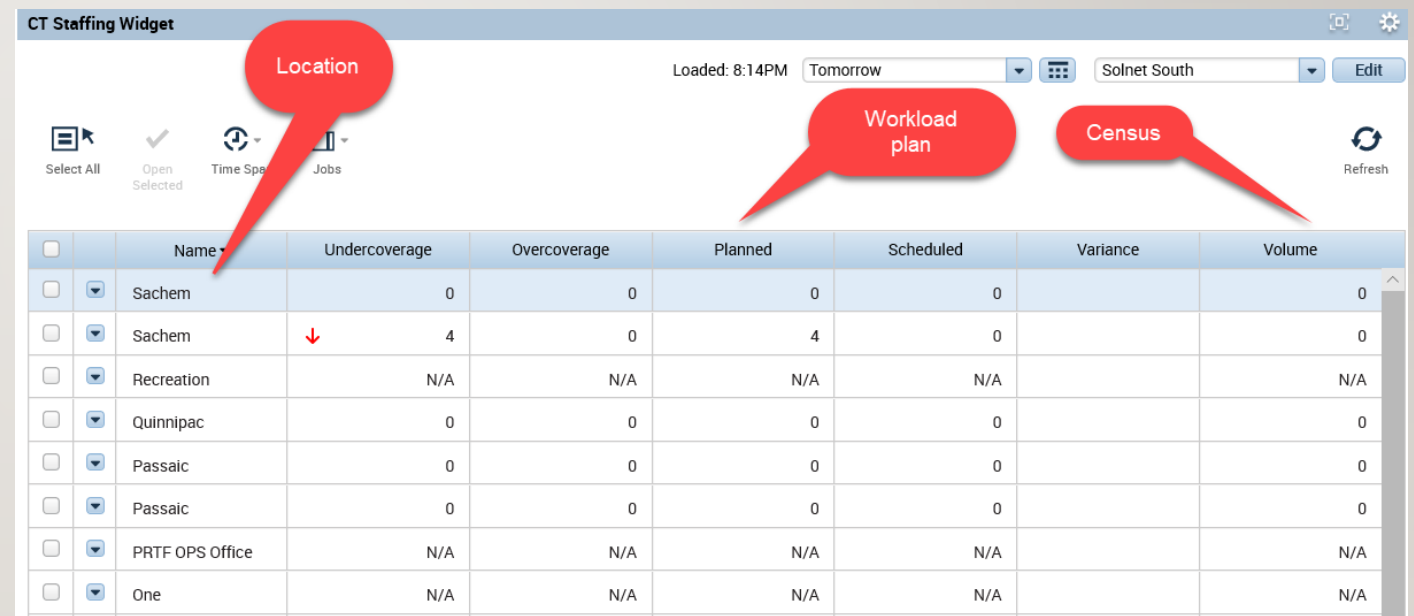
	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	7a-330p		7a-330p	7a-330p	7a-330p	7a-330p	
	2		7a-330p	7a-330p	7a-330p	7a-330p		7a-330p

[Cancel](#) [Apply](#)

# SCHEDULING – CT STAFFING WIDGET

Staff Management widget gives you quick access to your daily staffing plan so that you can make quick adjustments, such as when an employee calls out sick or you require more or less staff

**Note:** That this is a tool for daily operations, and should not replace the Schedule Planner or Schedule widget



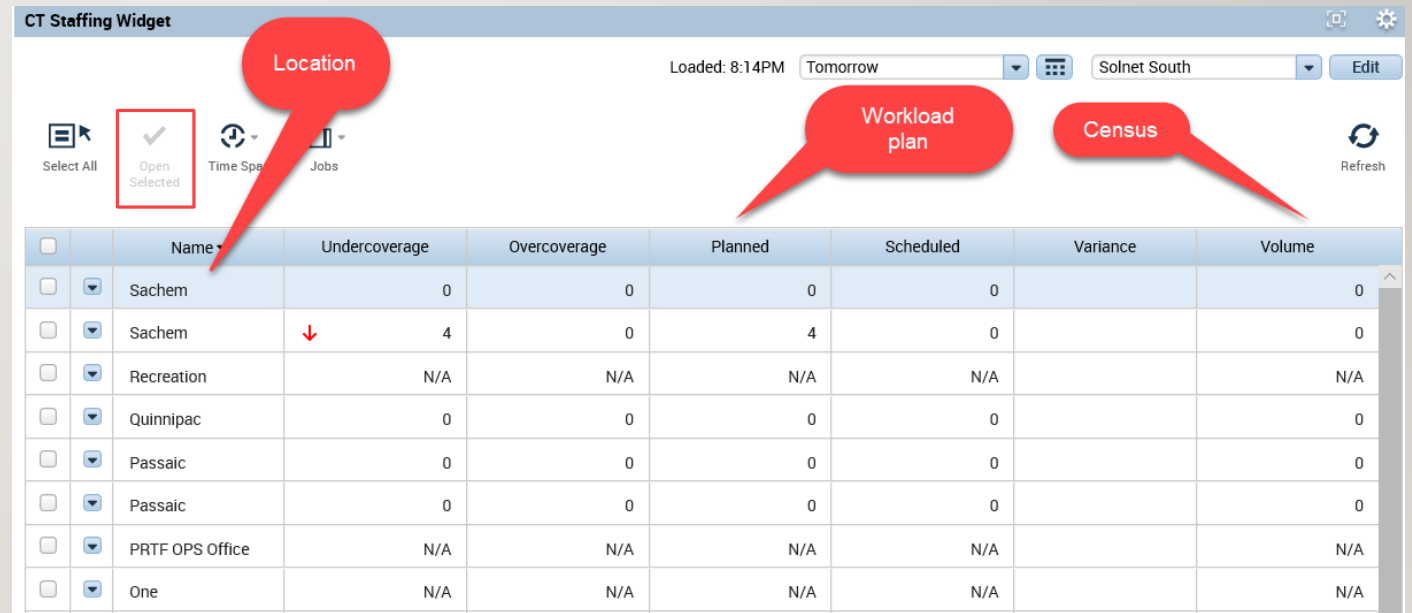
The screenshot shows the 'CT Staffing Widget' interface. At the top, it displays 'Loaded: 8:14PM', a date selector set to 'Tomorrow', and a location dropdown set to 'Solnet South'. Below this are buttons for 'Select All', 'Open Selected', 'Time Sp', and 'Jobs'. A table lists staffing data with columns for Name, Undercoverage, Overcoverage, Planned, Scheduled, Variance, and Volume. Red callout boxes point to the 'Location' dropdown, the 'Workload plan' button, and the 'Census' button.

	Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
<input type="checkbox"/>	Sachem	0	0	0	0		0
<input type="checkbox"/>	Sachem	↓ 4	0	4	0		0
<input type="checkbox"/>	Recreation	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	Quinnipac	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	PRTF OPS Office	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	One	N/A	N/A	N/A	N/A		N/A

# SCHEDULING – CT STAFFING WIDGET

The opening screen is the Summary view. Summary view shows you the locations that you have access to and any staffing issues associated with them.

You can also see the workload plan, volume, and selected time period. Choose the locations you want to modify and select **Open**



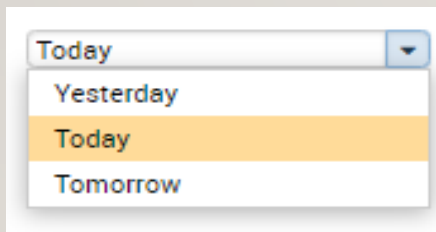
The screenshot shows the 'CT Staffing Widget' interface. At the top, it displays 'Loaded: 8:14PM', a date selector set to 'Tomorrow', and a location dropdown set to 'Solnet South'. Below this are three main buttons: 'Select All', 'Open Selected' (highlighted with a red box and a red callout labeled 'Location'), and 'Time Spacing'. To the right of these buttons are two red callouts labeled 'Workload plan' and 'Census'. A 'Refresh' button is located on the far right. The main table lists various locations with columns for Name, Undercoverage, Overcoverage, Planned, Scheduled, Variance, and Volume.










	Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
<input type="checkbox"/>	Sachem	0	0	0	0		0
<input type="checkbox"/>	Sachem	↓ 4	0	4	0		0
<input type="checkbox"/>	Recreation	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	Quinnipac	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	PRTF OPS Office	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	One	N/A	N/A	N/A	N/A		N/A

# SCHEDULING – CT STAFFING WIDGET – DETAIL VIEW

Detailed view shows you any variances in the staffing plan for the jobs at each location

Open the Quick Actions menu and select available employees to resolve these variances, select the date you want to change



								
Quick Actions	Available Employees	Sort	Time Span	Jobs	Shifts	Comfortable View	Summary	Refresh
Shifts Coverage Setting x								
Sachem				Manhasset				
↓ 4 ✓ 0 PLN 4 SCH 0 CEN 0				✓ 0 ✓ 0 PLN 0 SCH 0 CEN 0				
Job	Planned	Scheduled	Variance	Job	Planned	Scheduled	Variance	
CSUS	0	0	0	PRPSYC	0	0	0	
CSW	3	0	↓ -3	PSYCHI-PD	0	0	0	
CSWLEAD	0	0	0	PSYCHOCL	0	0	0	
Passaic				CMCU				
✓ 0 ✓ 0 PLN 0 SCH 0 CEN 0				↓ 1.15 ✓ 0 PLN 1.15 SCH 0 CEN 0				
Job	Planned	Scheduled	Variance	Job	Planned	Scheduled	Variance	
PRPSYC	0	0	0	AA	0.44	0	↓ -0.44	
PSYCHI-PD	0	0	0	APRN	0.35	0	↓ -0.35	
PSYCHOCL	0	0	0	LPN	0	0	0	

Name	Job	Schedule
Bermudez, Caterina	CSWLEAD	
Cain, Roosevelt D	CSW	
Febles, Feliberto	CSUS	
Ferraro, Patricia	CSUS	
Ford, Darnell H	CSWLEAD	
Gardner, Leslie	CSW	
Guerrera, Jill E	CSW	
Guerrera, Robin L	CSWLEAD	
Guzman, Jorge J	CSW	
Jackman, Alyssa R	CSW	
Joslin-Montlick, Eli	PRPHYS	

# SCHEDULING – CT STAFFING WIDGET – DETAIL VIEW

- To fill an open shift with an employee from the Employee Pool, select the employee in the pool and drag the employee to the open shift
- Pay codes, **green type** indicates a pay code. Pay codes show only for employees for whom this is the primary location under the schedule on employee list
- Hover the cursor over the employee name to see a tooltip with the job details, and shift or zone time details, for the employee.

Name	Job	Schedule
Jackman, Alyssa R	CSW	
Kutner, Deirdre A	CSWLEAD	2:45PM - 1...
Kutner, Deirdre A	CSWLEAD	2:45PM - 1...
Lunn, Daniel C	CSW	Vacation
Madore, Suzanne	CSWLEAD	
Morton, Maureen A	CSWLEAD	

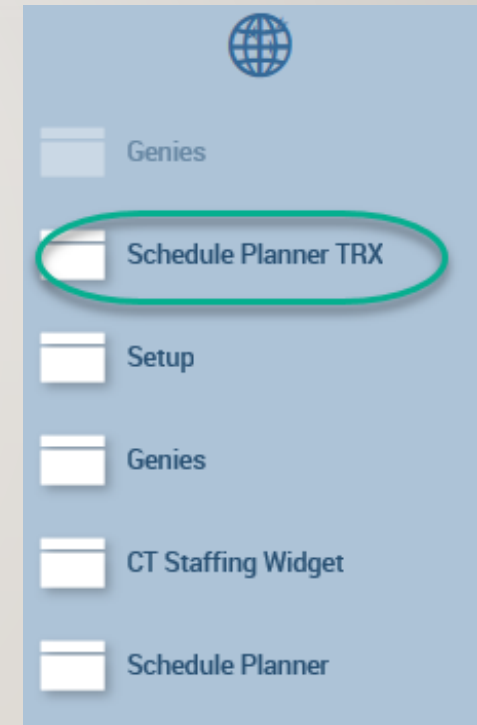
# ADVANCED SCHEDULER— EXERCISE 18

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# SCHEDULING – SCHEDULE PLANNER TRX

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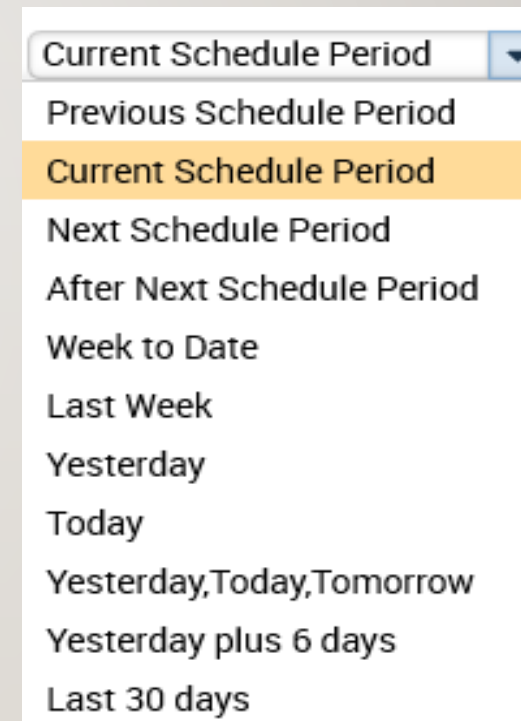
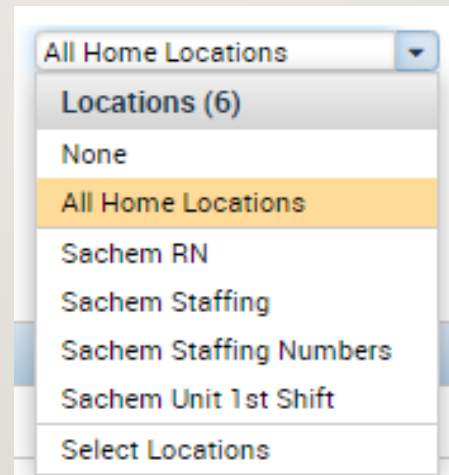
- Scheduler Planner TRX is specifically for presenting employees outside of the target area to fill openings.
- When using this planner, you will get a larger list of employees on the schedule.



# SCHEDULING – STAFFING ASSISTANT/CALL LIST

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- Use the Staffing Assistant/Call List to find the most appropriate employee to work an open shift, or replace an employee who can no longer work a shift
- First narrow down the Schedule Planner to your location and the desired scheduling period



# SCHEDULING – CALL LIST/VOT AND MOT

- Open the Staffing Assistant tab
- Select the correct procedure set, in this case we chose **1-DCF Solnit VOT Primary or Trx** for Voluntary Overtime click Load
- For Mandatory OT select **2-DCF MOT Solnit Primary or TRX**

Rule Violations Daily Coverage **Staffing Assistant**

Mon 4/13 7:00 am - 3:30 pm ...ding 8/Sachem/CSW Solnit South Sachem Edit 1-DCF Solnit VOT Primar... Load Last time lo

No.	Outcome	Contacted On	Name	Schedule Hours	Pay Rule	Worker Type	Locat...	Job	Seni... For S...	VO...	MO...	Skill
-----	---------	--------------	------	----------------	----------	-------------	----------	-----	------------------	-------	-------	-------

Rule Violations

Daily Coverage

Staffing Assistant

Mon 4/13 7:00 am - 3:30 pm ...ding 8/Sachem/CSW

Selected Locations

Edit

1-DCF Solnit VOT Primar...

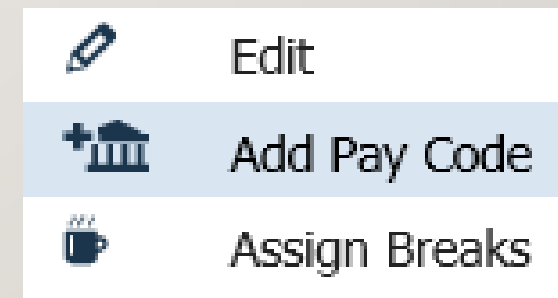
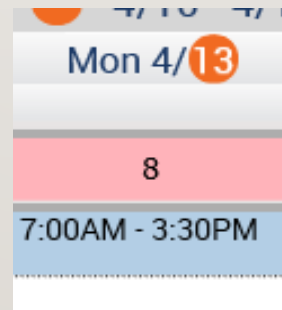
Load

	No.	Outcome	Contacted ...	Name	Schedule Hours	Pay Rule	Worker Type	Location	Job	Senio... For S...	VO...	MO...	Skill	Certif...
	1	Select	-	Bartell, Anthony	0.00	10 FT OT8 ...	Full Time	...ustody/Building 8/Sachem/.	CSW	1/06/1996				TACE, ...
	2	Select	-	Rankins, Anthony C	0.00	10 FT OT8 ...	Full Time	...Custody/Building 8/Acadia/.	CSW	2/24/1999				TACE, ...
	3	Select	-	Reynolds, Sabrina	0.00	10 PT OT8 ...	Part Time	...Custody/Building 8/Acadia/.	CSW	1/14/2004				TACE, ...
	4	Select	-	Pasquini, Patricia L	0.00	10 PT OT8 ...	Part Time	...Custody/Building 8/Acadia/.	CSW	3/18/2006				1st Aide...
	5	Select	-	Burnham, William	0.00	10 FT OT8 ...	Full Time	...ustody/Building 8/Sachem/.	CSW	12/13/20...				TACE, ...

# SCHEDULING – SCHEDULING ASSISTANT/CALL LIST

- The Staffing Assistant creates a list potentially filling all of the openings
- Select the desired outcome in each row of the staffing assistant to decide if you want to assign the shift
- On the shift itself you can add pay code “**Voluntary Overtime**”, but make sure the Override Shift option is unchecked, then click **Apply**

Rule Violations Daily Coverage Staffing Assistant					
Mon 4/13 7:00 am - 3:30 pm ...ding 8/Sachem/CSW Solneit South Sachem					
	No.	Outcome	Contacted On	Name	Sched Hour
<input type="checkbox"/>	1	Please Choose:	-	Bartell, Anthony	0.00
<input type="checkbox"/>	2	Accepted	-	Burnham, William	0.00

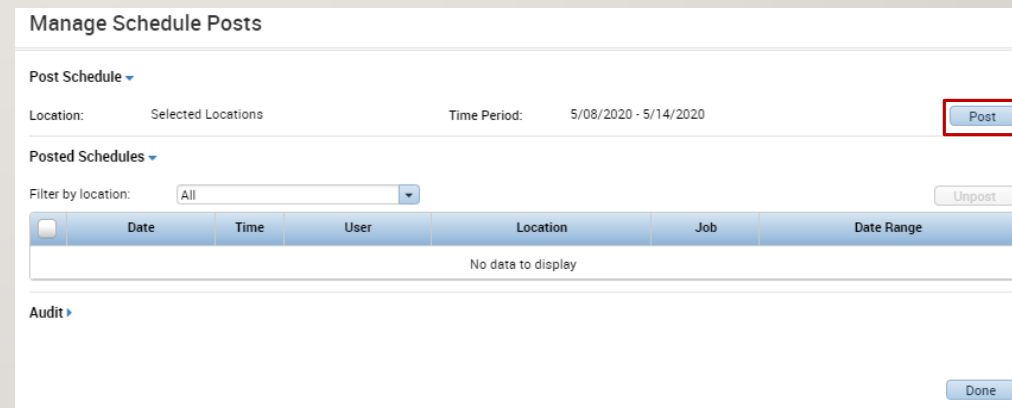
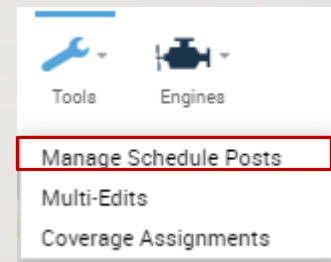


# ADVANCED SCHEDULER— EXERCISE 19

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# SCHEDULING – MANAGE SCHEDULE POSTS

1. Once you have finished assigning all scheduled to the selected employee location you need to post the schedule for the employees to be able to see your changes
2. Navigate to **Tools** under schedule planner and select **Manage Schedule Posts**, here you will view the location and schedule and select **Post**

A screenshot of the 'Manage Schedule Posts' interface. At the top, it says 'Manage Schedule Posts'. Below that is a 'Post Schedule' dropdown menu. Underneath, there are fields for 'Location:' (Selected Locations) and 'Time Period:' (5/08/2020 - 5/14/2020). A 'Post' button is highlighted with a red rectangular box. Below these fields is a 'Posted Schedules' section with a 'Filter by location:' dropdown set to 'All'. There is an 'Unpost' button. A table with columns 'Date', 'Time', 'User', 'Location', 'Job', and 'Date Range' is shown, but it contains the text 'No data to display'. At the bottom, there is an 'Audit' link and a 'Done' button.

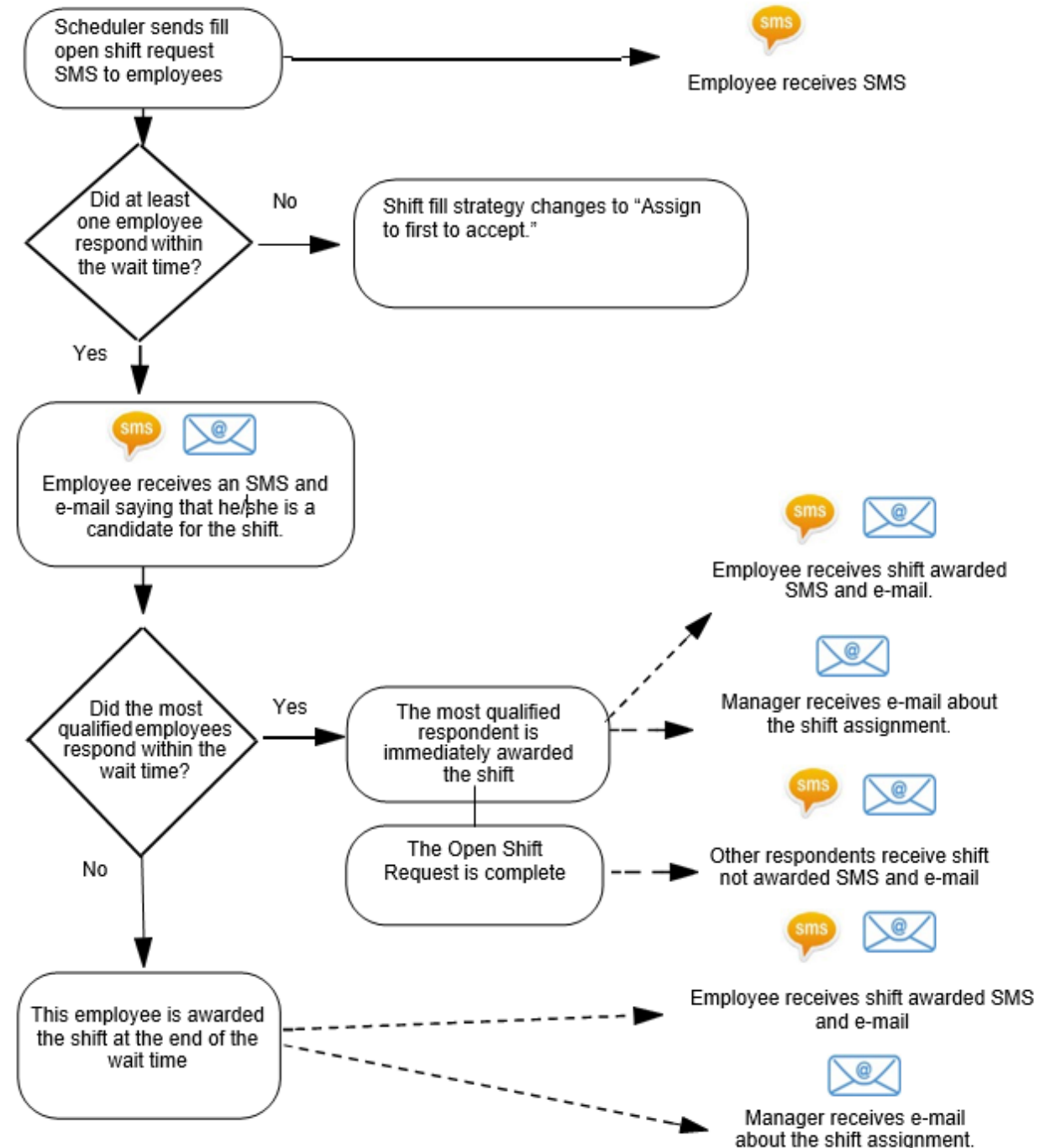
# ADVANCED SCHEDULER— EXERCISE 20

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# SCHEDULING – SMS QUICK FILL LOGIC

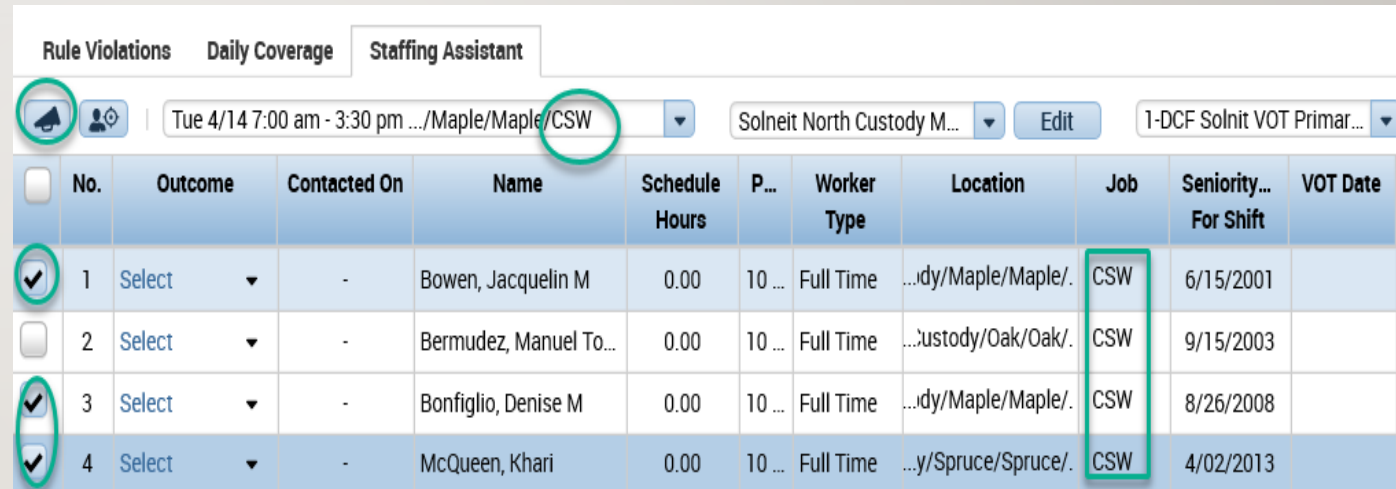
- Short Message Service (SMS) Quick Fill is a mobile solution to enable managers to fill open shifts quickly with the right staff.

Offer to All, Assign by Match Order

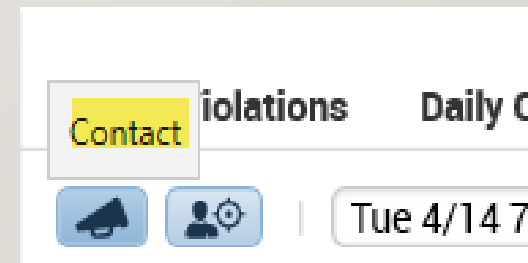


# SCHEDULING – SMS QUICK FILL

- After selecting the location and the desired job, you will be able to select which employees you want to contact by selecting the boxes next to the employee number
- Once you select the group of employees, you can click the **Contact** button where you will later fill in the number of available shifts



Rule Violations Daily Coverage Staffing Assistant											
Tue 4/14 7:00 am - 3:30 pm .../Maple/Maple/CSW Solnit North Custody M... Edit 1-DCF Solnit VOT Primar...											
	No.	Outcome	Contacted On	Name	Schedule Hours	P...	Worker Type	Location	Job	Seniority... For Shift	VOT Date
<input checked="" type="checkbox"/>	1	Select	-	Bowen, Jacquelin M	0.00	10 ...	Full Time	...dy/Maple/Maple/.	CSW	6/15/2001	
<input type="checkbox"/>	2	Select	-	Bermudez, Manuel To...	0.00	10 ...	Full Time	...ustody/Oak/Oak/.	CSW	9/15/2003	
<input checked="" type="checkbox"/>	3	Select	-	Bonfiglio, Denise M	0.00	10 ...	Full Time	...dy/Maple/Maple/.	CSW	8/26/2008	
<input checked="" type="checkbox"/>	4	Select	-	McQueen, Khari	0.00	10 ...	Full Time	...y/Spruce/Spruce/.	CSW	4/02/2013	



# SCHEDULING – SMS QUICK FILL

- After having selected the employees, fill in the number of shifts, a comment describing the shift, how to assign (by match order), and then the wait time. Select the bubble next to each employee name to select SMS
- Wait time offers shifts to all selected employees at once. If the most qualified employee accepts the shift, it is awarded immediately. Otherwise, all responses are pooled and the shift is awarded to the most qualified responder upon wait time expiration.
- Click Send

### Contact

CSW

CSW

1. 7:00AM [4:00]: Regular ./DCF-DCF91000/Solnit N/Custody/Maple/Maple/CSW

2. 11:00AM [0:30]: Break

3. 11:30AM [4:00]: Regular ./DCF-DCF91000/Solnit N/Custody/Maple/Maple/CSW

#### Employees to contact

Name	ID	SMS
Bowen, Jacquelin M	972454	<input checked="" type="radio"/>
Bonfiglio, Denise M	68915	<input type="radio"/>
McQueen, Khari	138840	<input type="radio"/>

#### Parameters

Open shifts to assign:

How To Assign: 

Offer to All, Assign by Match Order

Wait Time (minutes):

Comment: 

VOT

SMS Content: 

2 Open Shift(s) at .../Custody/Maple/Maple/CSW from 7:00am to 3:30pm on Tue, 4/14.

31/113 characters left

Cancel

Send

# SCHEDULING – SMS QUICK FILL – CONTRACT TRACKING

---

- Clicking the box next to the notify will show you contact tracking information, here you can see who the message was sent to and who accepted
- You can also run **Quick Fill Details Report** and **SMS Quick Fill Usage Summary Report**, under Reports to get more information

The screenshot displays a 'Contact tracking' dialog box. At the top, there's a dropdown menu set to 'All My Contact Tasks', a 'Time Period' field showing '4/14/2020 - 4/16/2020', and a 'Contact Time' dropdown with a 'Load' button. Below this is a table with the following data:

Contact Date and Time	Task	Status	Shift
4/14/2020 7:25 PM	Fill Open Shift	Completed	4/15/2020 [7:00AM - 3:30PM]

Green circles highlight the notification icon in the background window and the 'Completed' status in the table. An 'OK' button is at the bottom right of the dialog.

# ADVANCED SCHEDULER— EXERCISE 21

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# THE END

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Please refer to the Scheduling Manager job aids and the eLearnings for any further questions and don't hesitate to reach out to your local Kronos contact and your supervisors with any questions