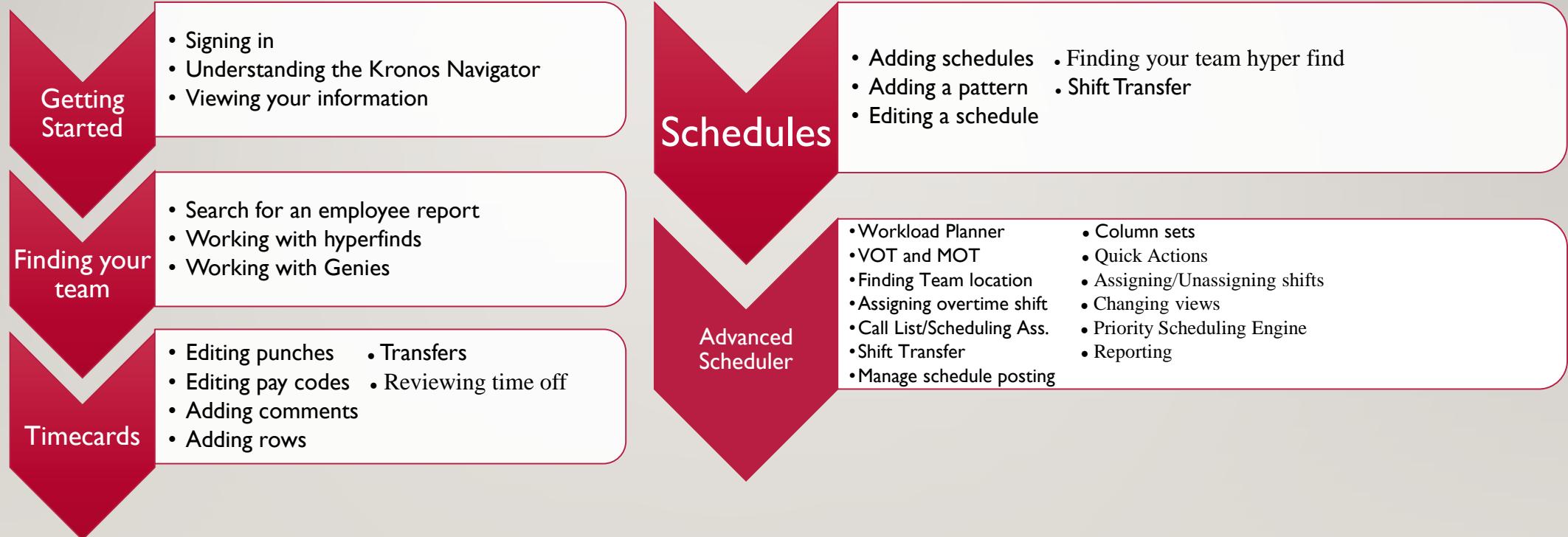


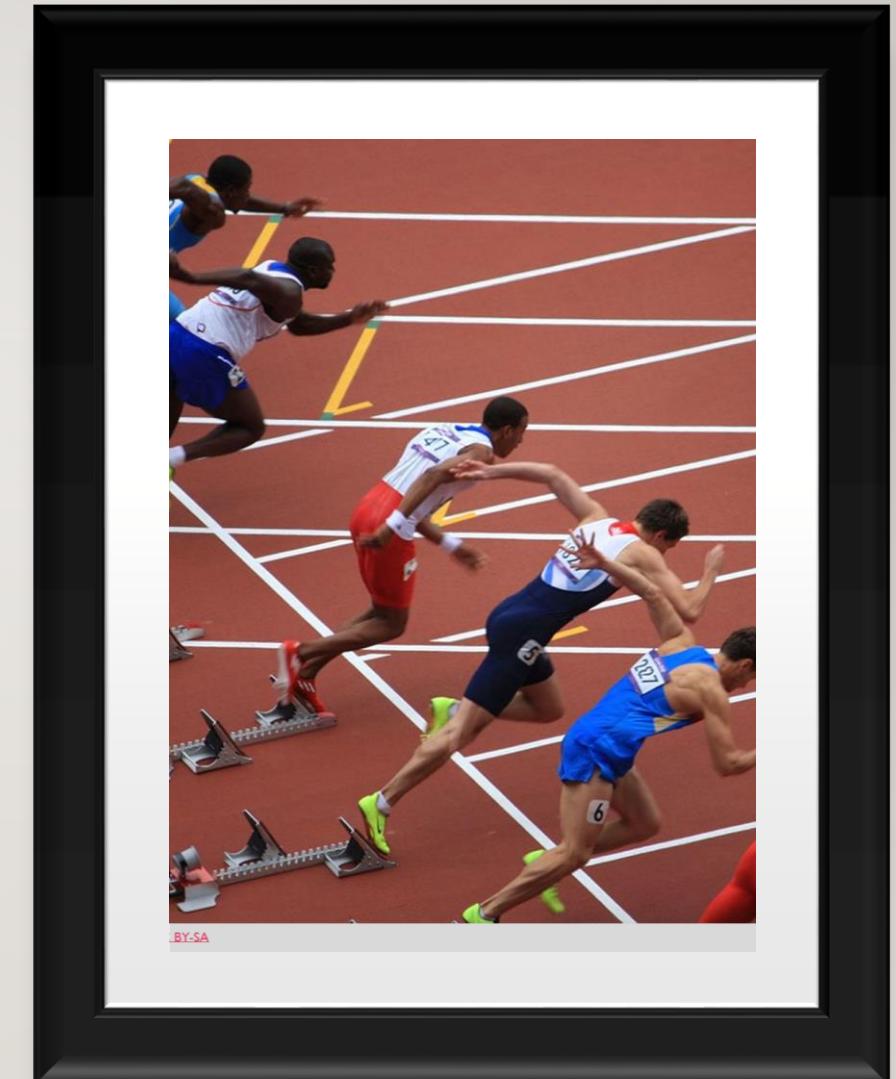
KRONOS TRAINING

CT SCHEDULING MANAGER

AGENDA

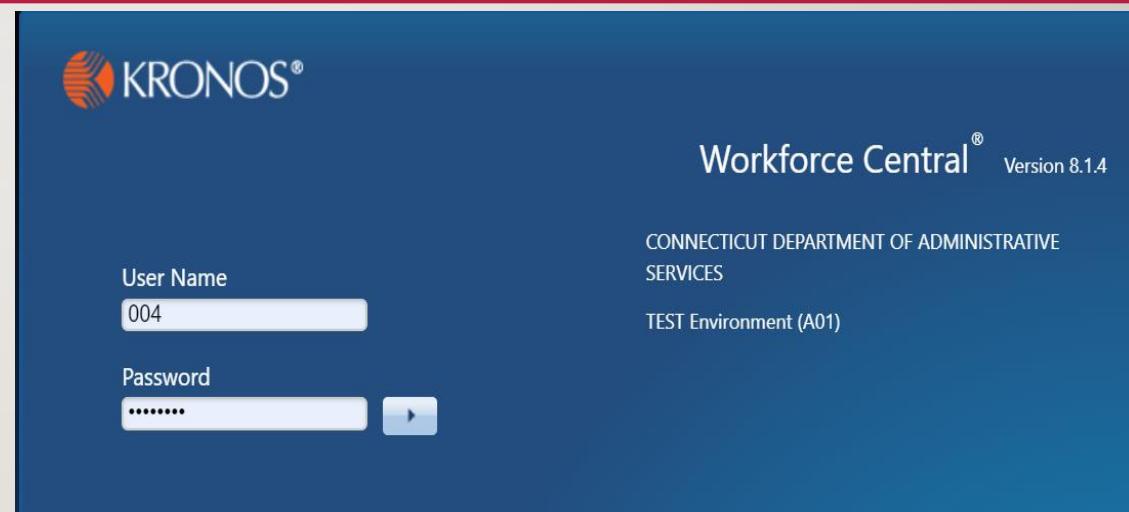


GETTING STARTED



GETTING STARTED – SIGNING IN

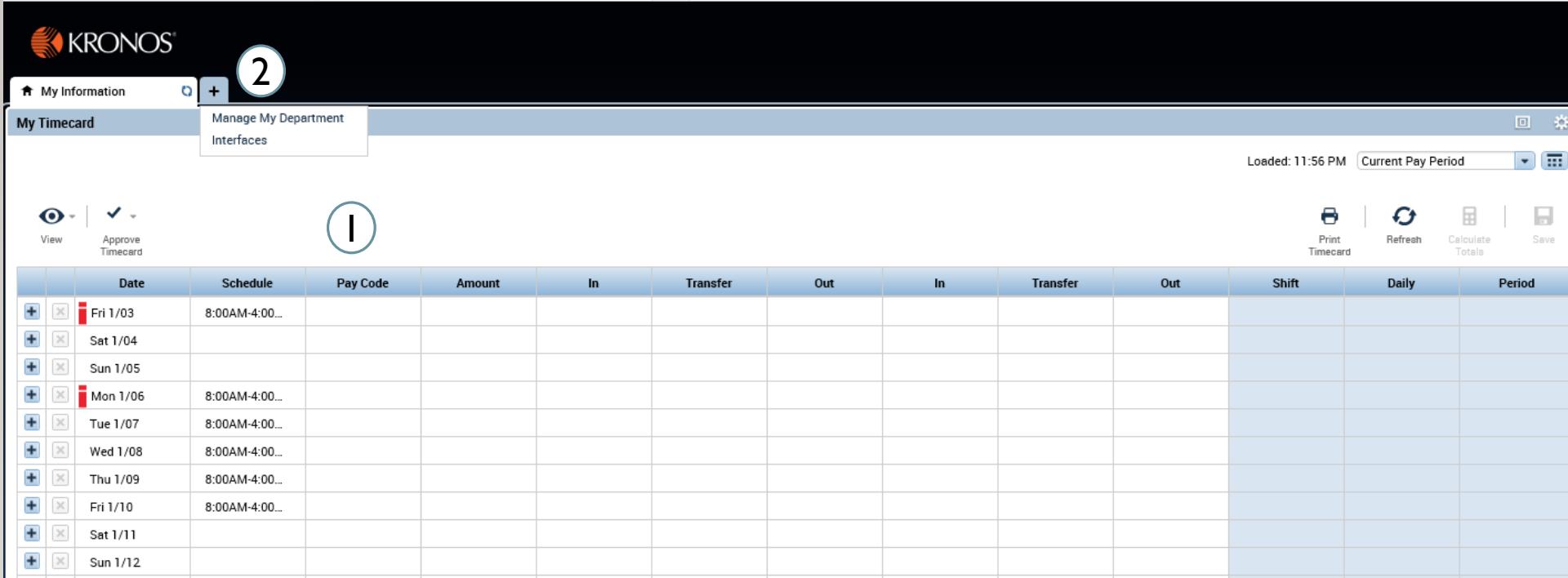
- Now that you have successfully swiped let's log on to Kronos.
- Open a web browser and enter:
 - <https://ctgov.kronos.net/wfc/logon>
- Enter your user name and password



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 are 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



The screenshot shows the Kronos Navigator software interface. At the top, there's a navigation bar with the KRONOS logo, a 'My Information' link, and a search bar. Below the bar, a blue header bar contains the text 'My Timecard' and 'Manage My Department Interfaces'. A circled '2' is over the 'Manage My Department Interfaces' link. The main area is a table titled 'My Timecard' with columns for Date, Schedule, Pay Code, Amount, In, Transfer, Out, In, Transfer, Out, Shift, Daily, and Period. A circled '1' is over the 'Approve Timecard' button in the top left of this table. At the bottom right of the table, there are buttons for Print Timecard, Refresh, Calculate Totals, and Save. The status bar at the bottom indicates 'Loaded: 11:56 PM' and 'Current Pay Period'.

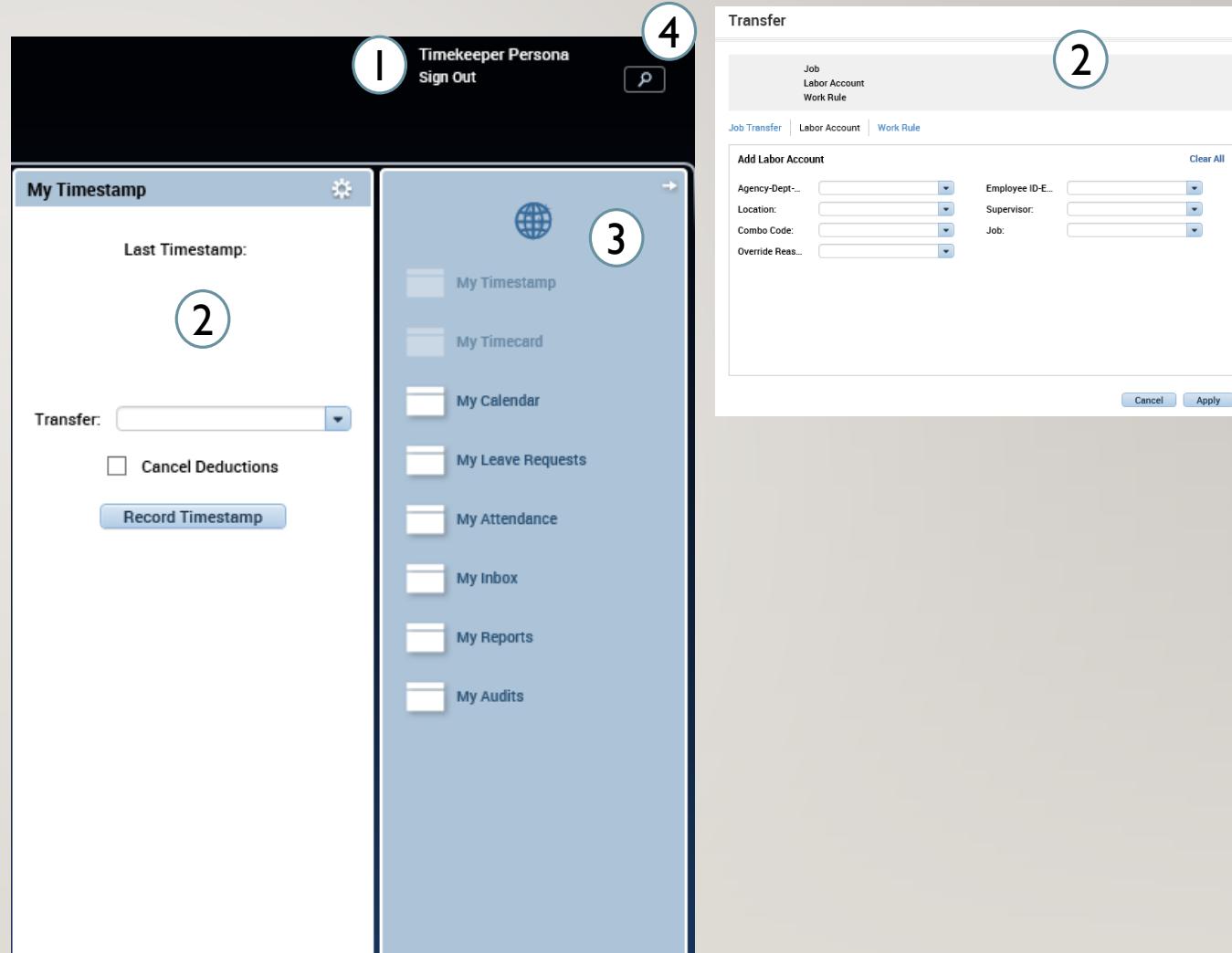
1. Employee timecard:
Can add your own punches, add specific pay codes, and also approve your timecard
2. Clicking the ‘+’ sign will bring you a list of the different modules you can access, as a timekeeper you can manage your department and export time reports

GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

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

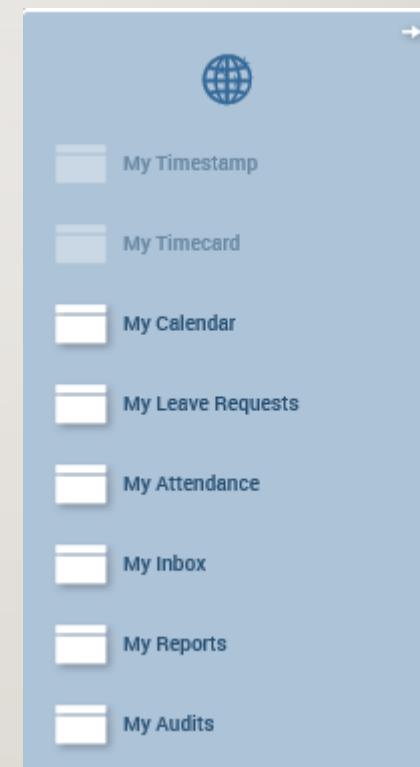
GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

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



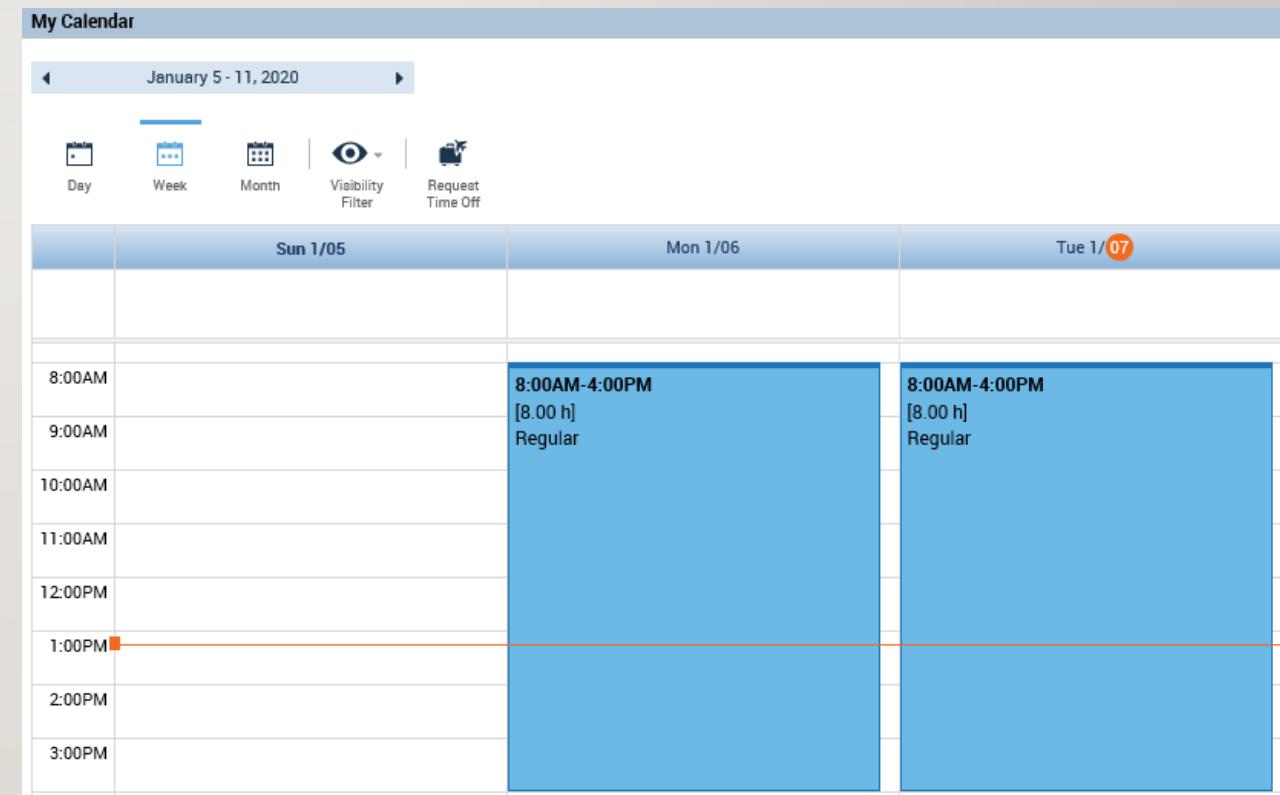
GETTING STARTED – VIEWING YOUR INFORMATION

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



The screenshot shows a weekly calendar view for the week of January 5-11, 2020. The interface includes a header with a 'My Calendar' title, a date range selector (January 5 - 11, 2020), and navigation buttons for Day, Week, Month, Visibility Filter, and Request Time Off. The calendar grid shows a 6x7 grid of time slots (8:00AM to 4:00PM) for each day. The days are color-coded: Sunday and Saturday are in light blue, while Monday through Friday are in white. A specific slot on Monday at 1:00PM is highlighted with a red border, indicating a scheduled event or a time off request. The days of the week are labeled as Sun 1/05, Mon 1/06, and Tue 1/07.

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
<input type="button" value="+"/> <input type="button" value="X"/>	1/07/2020	1/07/2020	Vacation	Full day		

Accruals on: 1/07/2020

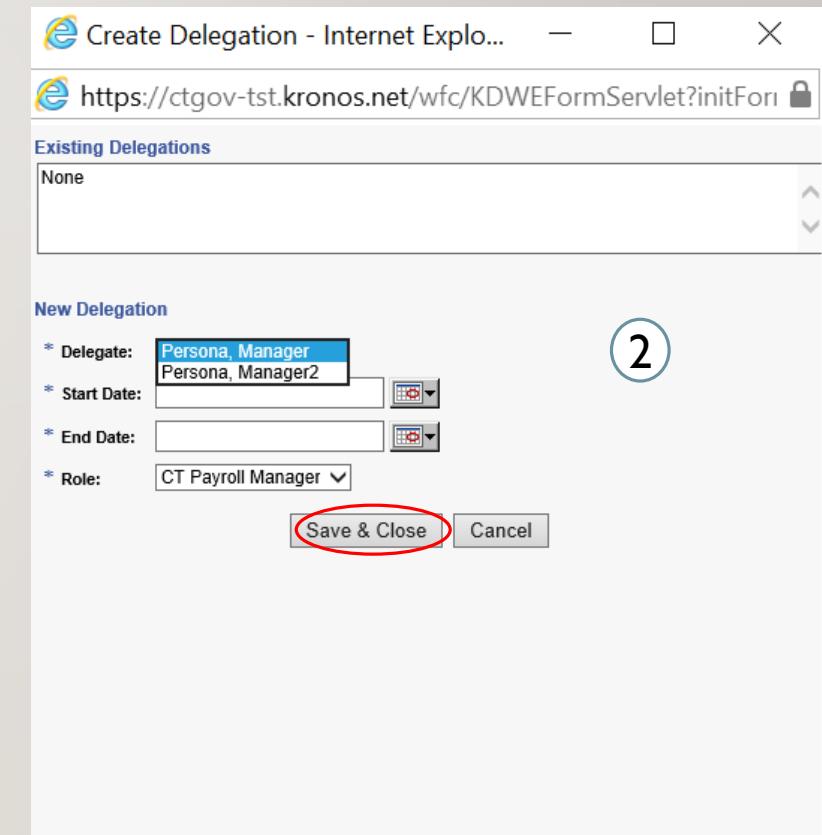
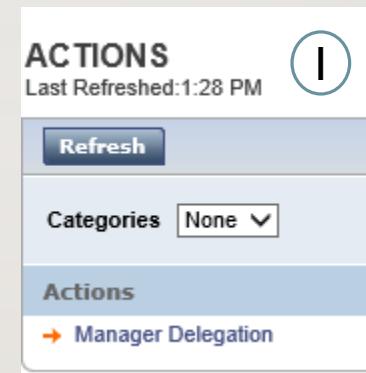
Accrual	Balance
Bone Marrow Donor	56.0 Hour
Comp Time	0.0 Hour
Comp Time Holiday	0.0 Hour

GETTING STARTED – VIEWING YOUR INFORMATION



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



Internet Explorer window titled 'Create Delegation - Internet Explor...' showing the URL 'https://ctgov-tst.kronos.net/wfc/KDWEFormServlet?initFor...'.

The window displays the 'Existing Delegations' section with the message 'None'.

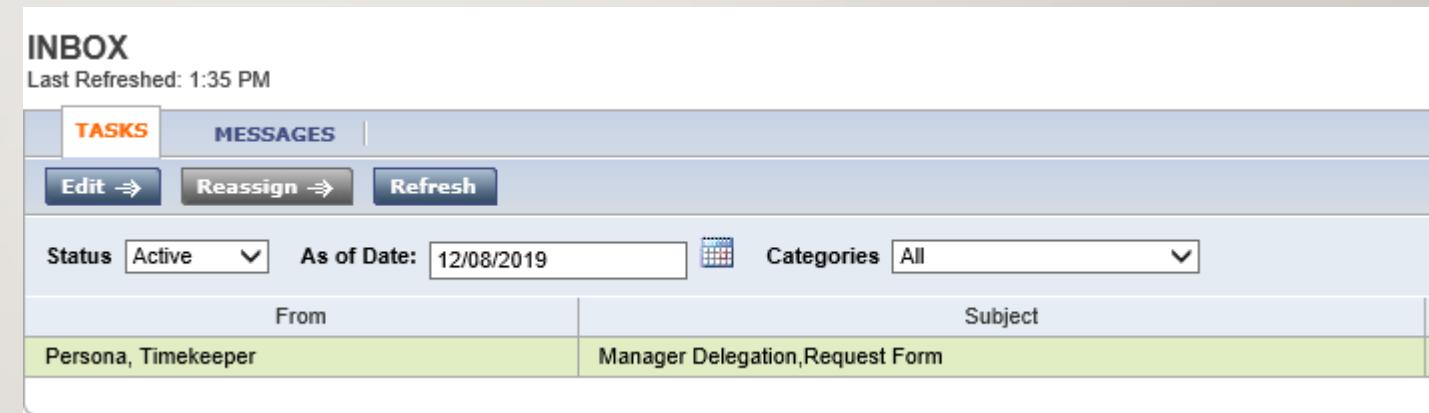
The 'New Delegation' section contains the following fields:

- * Delegate: Persona_Manager (highlighted in blue)
- * Start Date: (input field)
- * End Date: (input field)
- * Role: CT Payroll Manager

At the bottom right, there are 'Save & Close' and 'Cancel' buttons. The 'Save & Close' button is circled in red.

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



The screenshot shows the 'INBOX' interface. At the top, it displays 'Last Refreshed: 1:35 PM'. Below this is a navigation bar with 'TASKS' (highlighted in orange) and 'MESSAGES' tabs, along with 'Edit', 'Reassign', and 'Refresh' buttons. The main area has filters for 'Status: Active', 'As of Date: 12/08/2019', and 'Categories: All'. A table lists one item: 'From: Persona, Timekeeper' and 'Subject: Manager Delegation, Request Form'.

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's

2

My Accrual Balances and Projections

REPORTS

Name: Persona, Timekeeper

View Report Primary Account

AVAILABLE REPORTS

Schedule Time Detail

Time Period Specific Date

My Accrual Balances and Projections

As Of

Description

Displays an employee's

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

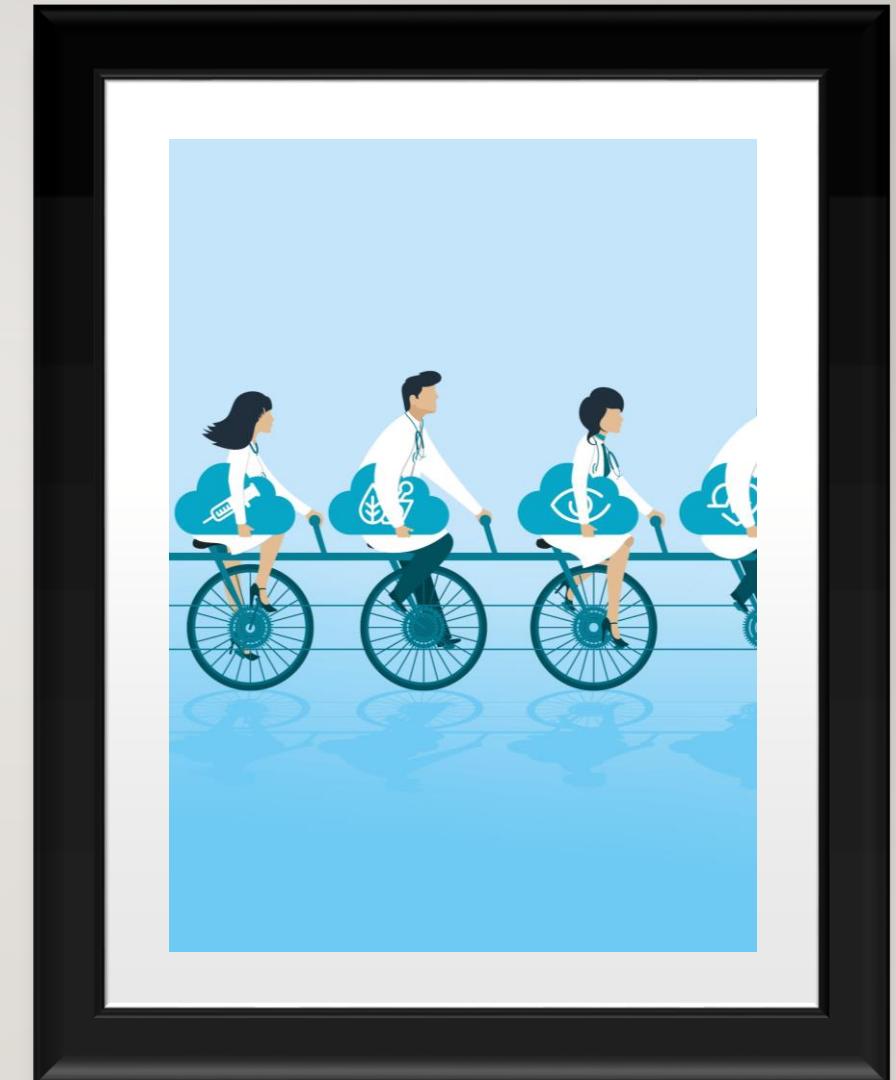
Category: Type of Edit:

Time	Type	Account
52PM	Add Punch	

My Audits

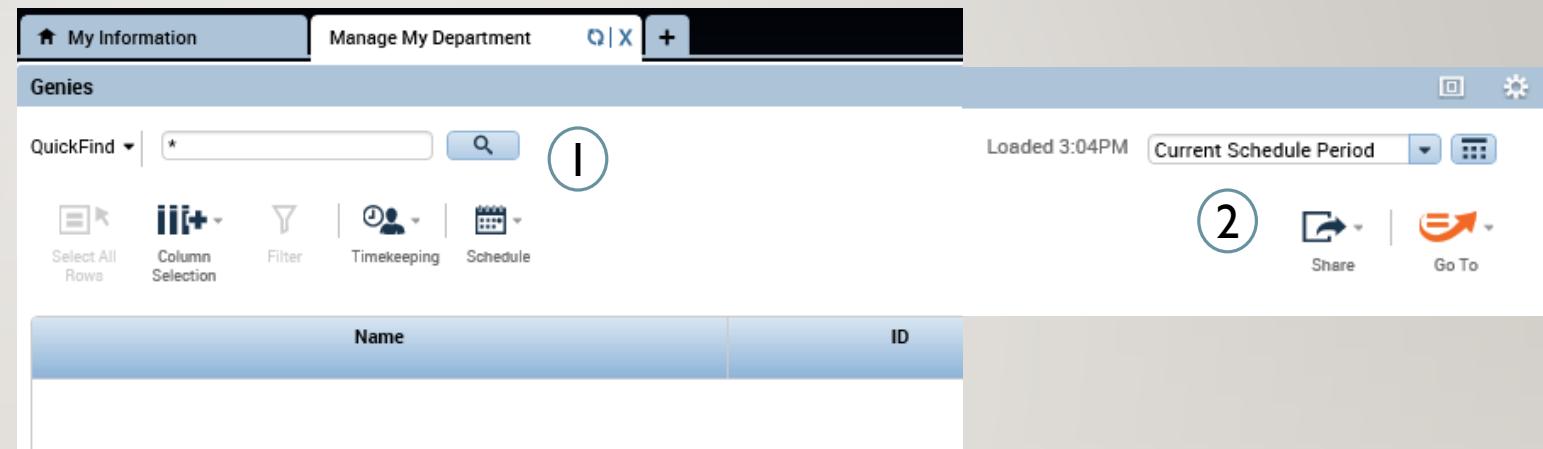
- My Audits
- My Comments
- My Overtime Requests
- My Signoff and Approval
- My Moved Amounts
- My After Sign-Off Audits
- My Corrections
- My Activity Event Audits

FINDING YOUR TEAM



FINDING YOUR TEAM – SEARCHING FOR AN EMPLOYEE

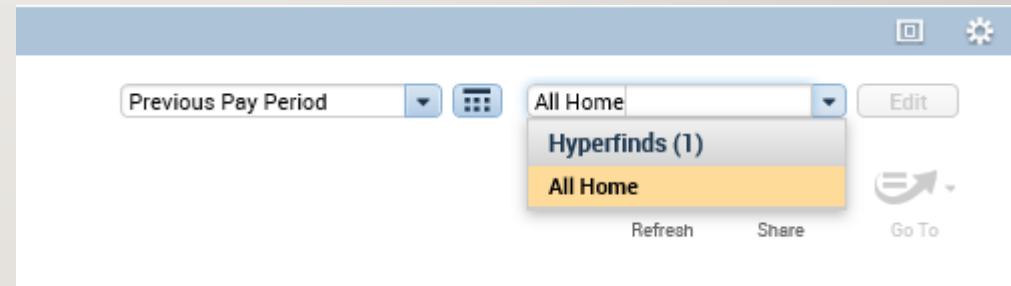
1. Under the Manage My Department interface use the default QuickFind Genie and search for your employee. Type in the name of your employee or begin the search with '*' to search employees with their names ending in the following letters, end your search with '*' to find employees whose names start with 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



The screenshot shows the 'Manage My Department' interface. At the top, there are tabs for 'My Information' and 'Manage My Department'. A search bar with a magnifying glass icon and a '+' button is located above the main content area. The main area is titled 'Genies' and contains a 'QuickFind' search bar with an asterisk (*) placeholder. Below the search bar are several buttons: 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', and 'Schedule'. To the right of the search bar, there is a large 'I' icon inside a circle. The bottom of the interface shows a table with columns 'Name' and 'ID', but no data is present. On the right side, there are status indicators: 'Loaded 3:04PM' and 'Current Schedule Period'. Below these are 'Share' and 'Go To' buttons, each with a circled number '2' above it. The bottom right corner of the interface has a gear icon.

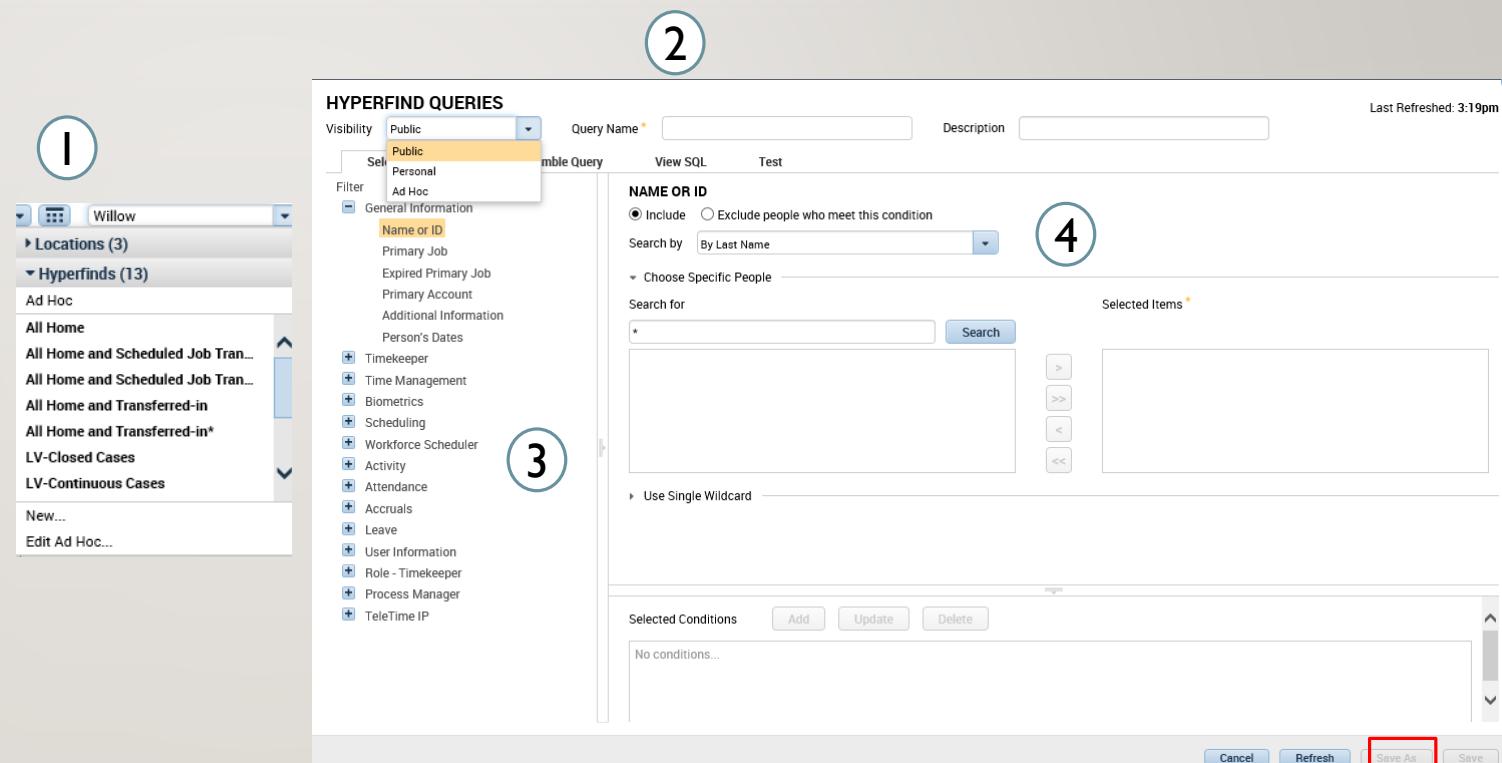
FINDING YOUR TEAM – WORKING WITH HYPERFINDS

- 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 hyper find creation.



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

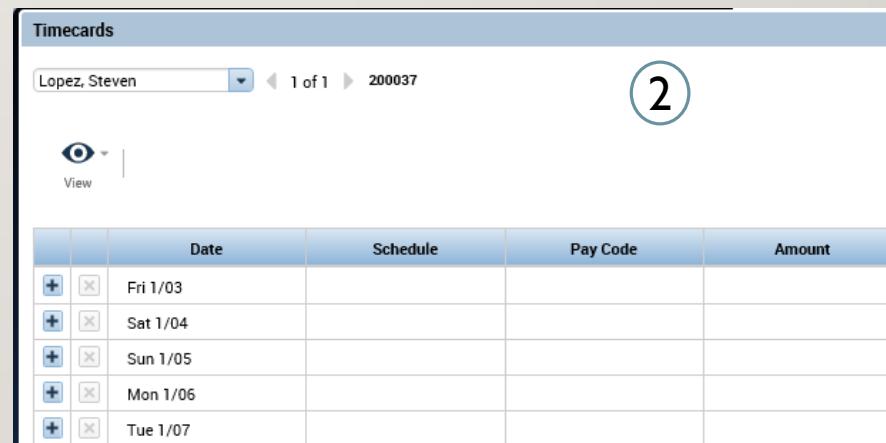
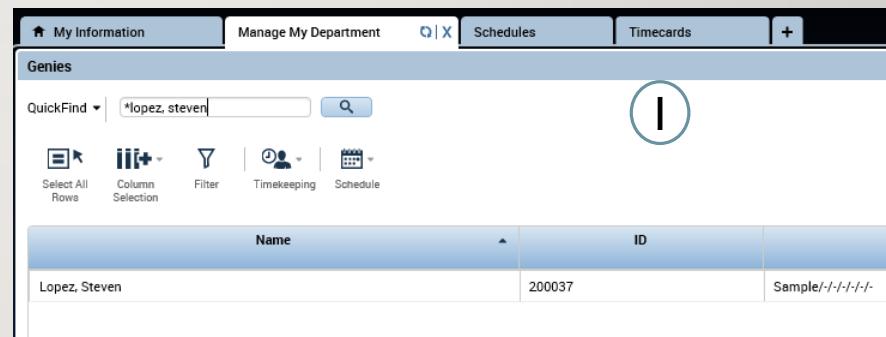
The image displays two screenshots of the Genies software interface. The top screenshot shows the 'Skills and Certs' search results. The 'Skills and Certs' option is highlighted in the dropdown menu. The results table has columns for Person Name, Skill, Skill Abbreviation, Certification..., Certification Abbrev..., and Certification Expirat... (partially visible). The bottom screenshot shows the 'DCF Summary' search results. The results table has columns for Name, Primary La... Account, Primary Location Descr..., Primary Location Name..., Seniority Date For Shift, Job, Job Description - Job 0..., Primary Job Nam..., Primary Job Description - Full, and Organizational G... (partially visible). Both screenshots show standard software navigation buttons like 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', 'Approval', 'Schedule', and 'Absence'.

TIMECARDS



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



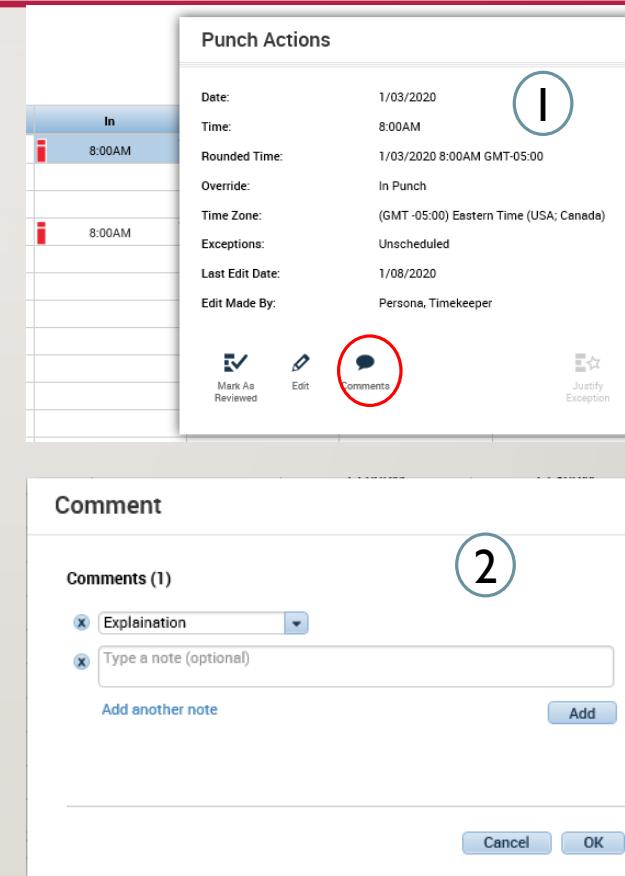
TIMECARDS – EDITING PUNCHES

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

Date	Schedule	Pay Code	Amount	In	Transfer	Out
<input type="button" value="+"/> <input type="button" value="x"/> Fri 1/03				i 8:00AM		
<input type="button" value="+"/> <input type="button" value="x"/> Sat 1/04						
<input type="button" value="+"/> <input type="button" value="x"/> Sun 1/05						
<input type="button" value="+"/> <input type="button" value="x"/> Mon 1/06				i 8:00AM		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

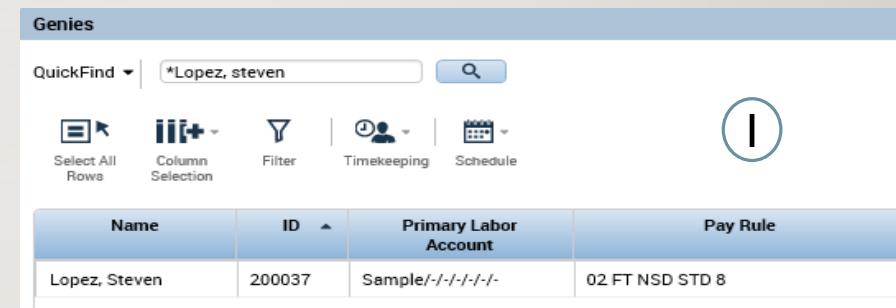


TIMECARDS – EXERCISE 2

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
				1
Name	ID	Primary Labor Account	Pay Rule	
Lopez, Steven	200037	Sample/-/-/-/-/-	02 FT NSD STD 8	



	Date	Schedule	Pay Code	Amount
<input type="button" value="+"/> <input type="button" value="X"/>	Fri 1/03			
<input type="button" value="+"/> <input type="button" value="X"/>	Sat 1/04			
<input type="button" value="+"/> <input type="button" value="X"/>	Sun 1/05			
<input type="button" value="+"/> <input type="button" value="X"/>	Mon 1/06			
<input type="button" value="+"/> <input type="button" value="X"/>	Tue 1/07		2	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.
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.

1

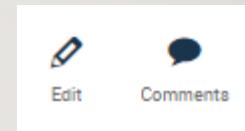
		Tue 1/07		Governor Granted Ti...	2.0	

2

Shift	Daily
8.5	8.5

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:	Out Punch New Shift 30 Min Break Rule 45 Min Break Rule 60 Min Break Rule
Comments:	

Punch

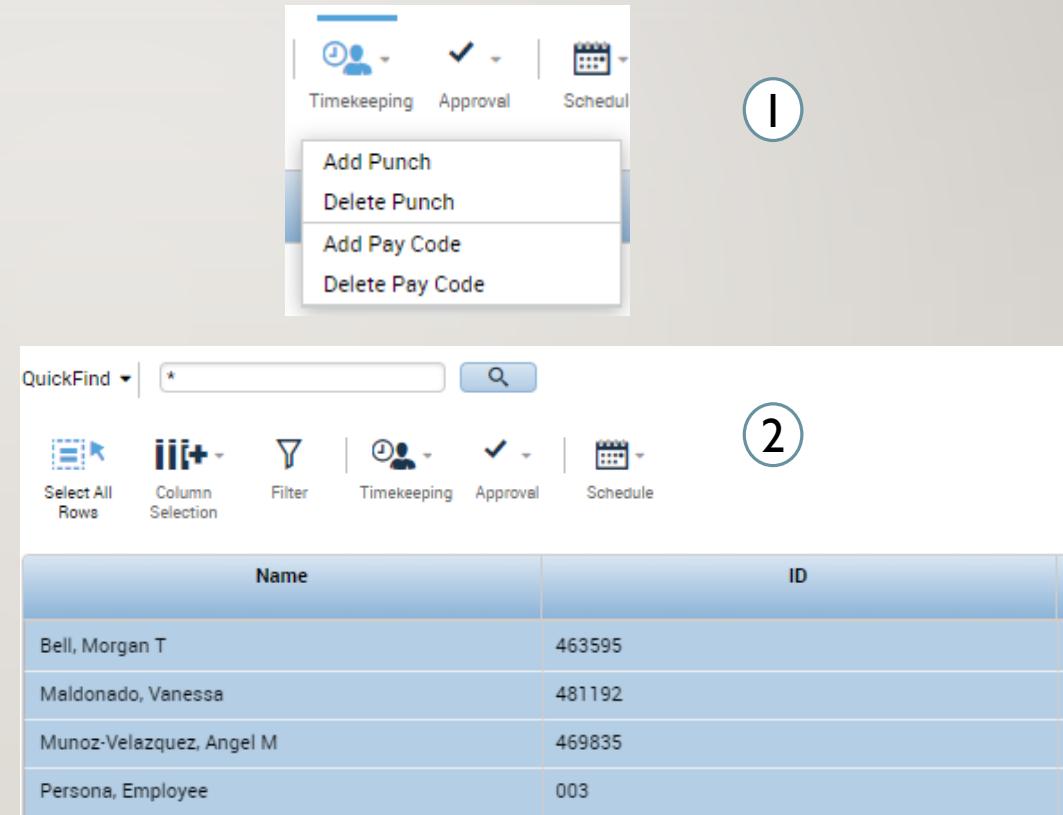
Date:	11/04/2019
Time (h:mm) *	7:00AM
Rounded Time:	11/04/2019 7:00AM GMT-05:00
Override:	In Punch
Time Zone:	(GMT -05:00) Eastern Time (USA; Canada)
Cancel Deduction:	Holiday Bonus HOL BONS KGS Good Holiday Bonus 7.5hrs Lunch Deduct 30 Min, 0 Hrs Work Lunch Deduct 30 Min, 6 Hrs Work Lunch Deduct 30 Min, Swap Lunch Deduct 45 Min, 0 Hrs Work
Exceptions:	
Comments:	

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



The screenshot shows a software interface for managing timecards. At the top, there is a toolbar with icons for Timekeeping, Approval, and Schedule. A context menu is open, circled with a blue circle and labeled '1', containing the following options: Add Punch, Delete Punch, Add Pay Code, and Delete Pay Code. Below the toolbar, there is a search bar labeled 'QuickFind' and several filter and selection buttons: 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', 'Approval', and 'Schedule'. The main area displays a table of employees with the following data:

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

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 3rd shift and needs to be paid on a pass day, use the pay code **Hol Comp Earned Pass Dy 7HR, 7.5HR, 8HR**

Totals			
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					
All		Pay Code			
Pay Code					
Holiday Comp Earned on Pass Dy					

TIMECARDS – HOLIDAYS 3RD 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		
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

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 DiffTRCs 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

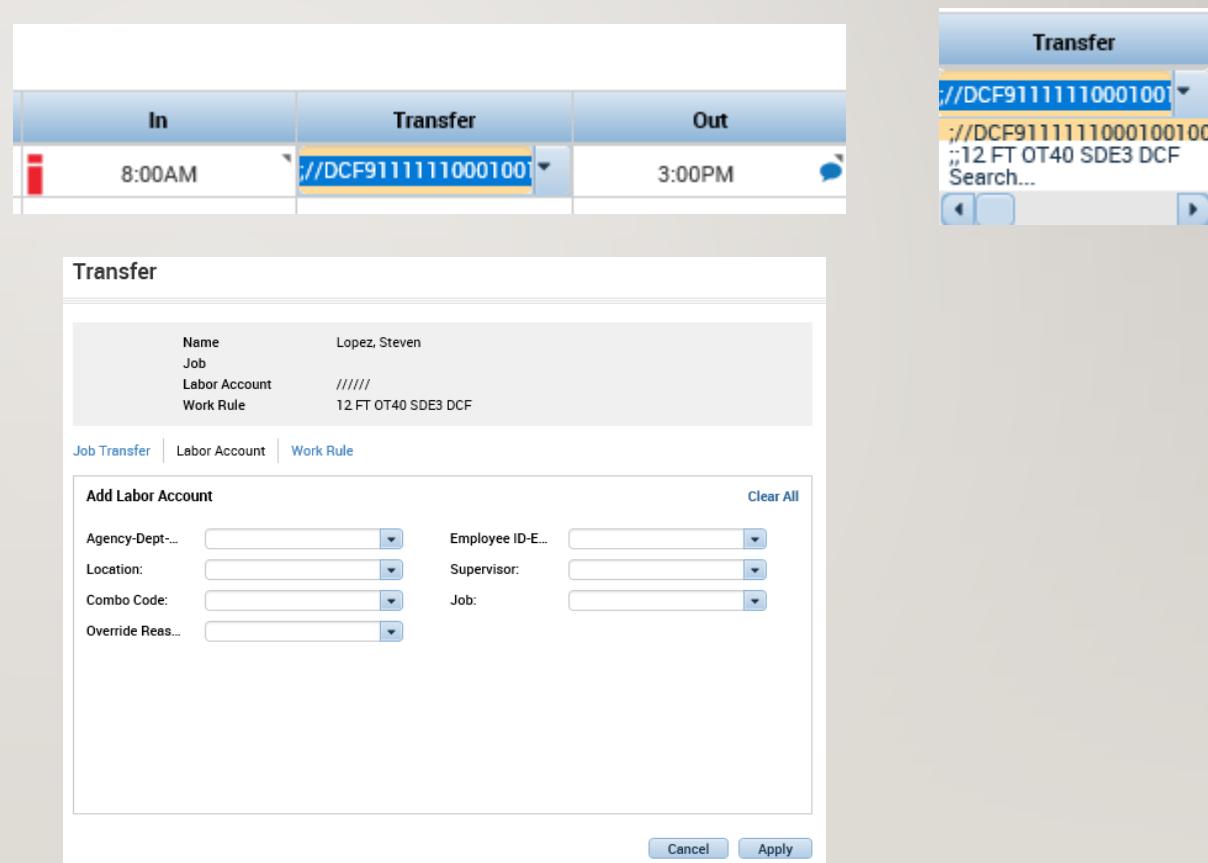
Tue 11/05		Shift Differential	8:00
		Vacation	8:00

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



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	12 FT OT40 SDE3 DCF
Work Rule	

Job Transfer | Labor Account | **Work Rule**

Add Labor Account Clear All

Agency-Dept-...	Employee ID-E...
Location:	Supervisor:
Combo Code:	Job:
Override Reas...	

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	12 FT OT40 SDE3 DCF
Work Rule	

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

Add Work Rule

Search List

- 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

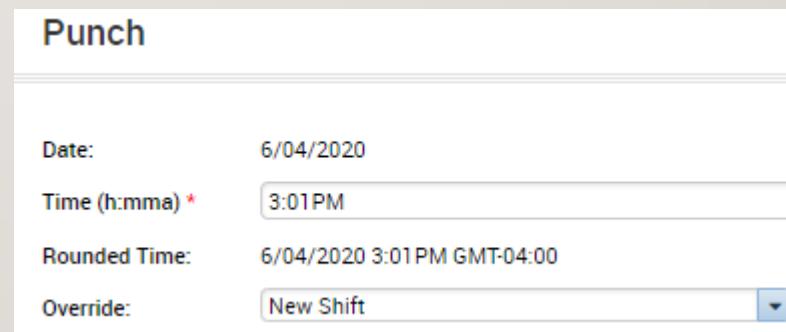
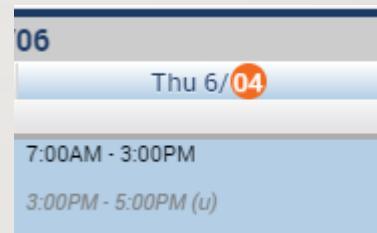
1. Select the day that you want to validate time entry for from the timecard
2. Open the totals section at the bottom using the arrow shown here 
3. Switch the view to daily and check how the hours are being paid in this case we see its being paid as all regular when two hours should be overtime

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



TIMECARDS – TROUBLESHOOTING

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

1

2

3

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

7:00AM 3:00PM

3:01PM 5:00PM

Overtime Date: 6/04/2020
Unapproved Overtime Amount (HH:mm): 2:00
Amount: All
Pay Code: Overtime at Time and O...
Amount: 2:00
Wages: \$0.00

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.

Screenshot 1: A screenshot of a software interface showing a 'Go To' menu. The 'Requests' option is highlighted with a red box. A circled '1' is in the top left corner.

Screenshot 2: A screenshot of the 'Approve Time-Off Request' dialog. It shows a list of requests with columns for Modified By (Username), Subject, and Submit Date. Below is a table for editing the request, and at the bottom is a 'Comments (0)' section with a red box around the 'Type a note (optional)' input field. A circled '2' is in the top left corner.

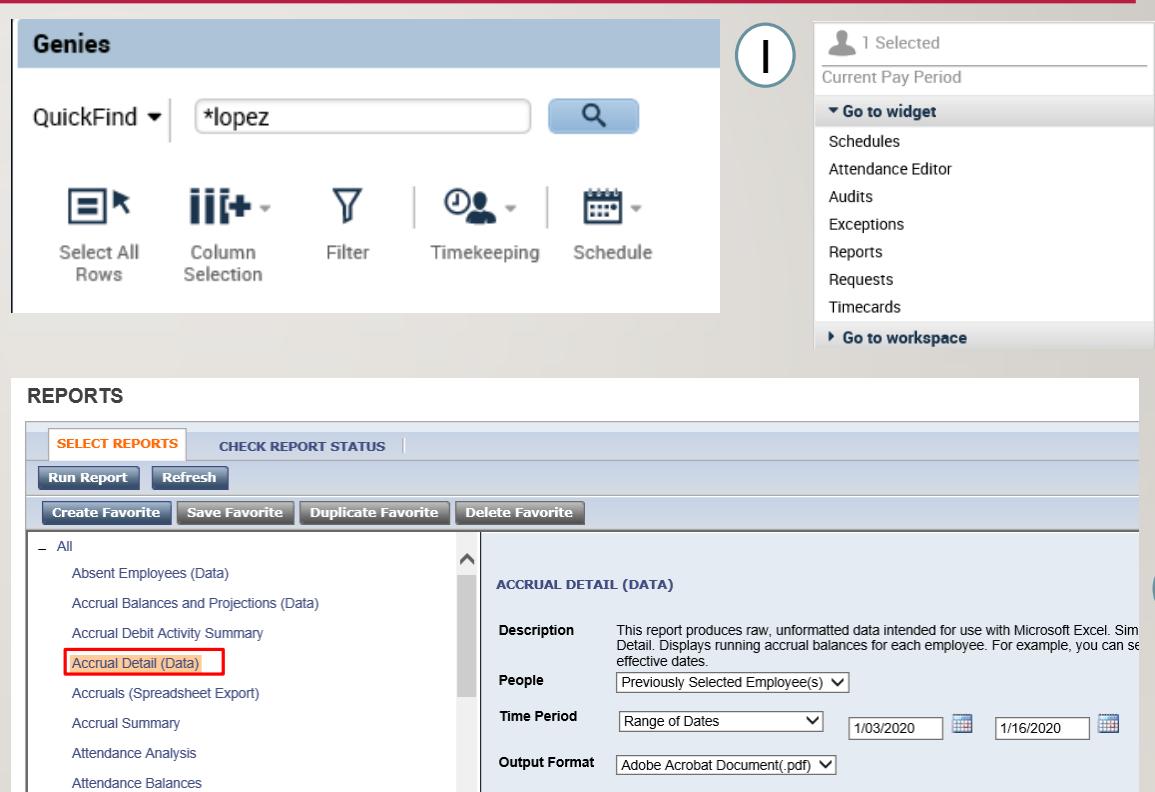
Screenshot 3: A screenshot of the 'Approve Time-Off Request' dialog, showing the 'Comments (0)' section in more detail. It includes a dropdown for 'Select Comment' and an input field for 'Type a note (optional)'. A circled '3' is in the top left corner.

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 software interface. At the top, there is a search bar labeled "QuickFind" with the text "*lopez" and a search icon. Below the search bar are several buttons: "Select All Rows", "Column Selection", "Filter", "Timekeeping", and "Schedule". To the right of these buttons is a sidebar with the following content:

- 1 Selected
- Current Pay Period
- Go to widget** (highlighted with a blue circle and the number 1)
- Schedules
- Attendance Editor
- Audits
- Exceptions
- Reports
- Requests
- Timecards
- Go to workspace**

Below the sidebar is a "REPORTS" section. It has a "SELECT REPORTS" tab and a "CHECK REPORT STATUS" tab. Under "SELECT REPORTS", there are buttons for "Run Report" and "Refresh", and links for "Create Favorite", "Save Favorite", "Duplicate Favorite", and "Delete Favorite". A list of report options is shown, with "Accrual Detail (Data)" highlighted with a red box and the number 2. To the right of this list is a "ACCURAL DETAIL (DATA)" configuration panel with the following fields:

- Description:** This report produces raw, unformatted data intended for use with Microsoft Excel. Sim Detail: Displays running accrual balances for each employee. For example, you can see effective dates.
- People:** Previously Selected Employee(s) (dropdown menu)
- Time Period:** Range of Dates (dropdown menu) with values 1/03/2020 and 1/16/2020
- Output Format:** Adobe Acrobat Document(.pdf) (dropdown menu)

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

SCHEDULING



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.

The image consists of three screenshots illustrating the process of adding a shift to a schedule:

- Screenshot 1:** Shows the 'Go To' menu with the 'Schedules' option selected. A circled '1' is over the 'Schedules' link.
- Screenshot 2:** Shows a context menu for an employee named 'Lopez, Steven'. The 'Schedule Pattern' option is selected. A circled '2' is over the 'Schedule Pattern' link.
- Screenshot 3:** Shows the 'Add Shift' dialog box. The shift details are: Assigned to 'Lopez, Steven', Shift Details '12:00am-1:00am(1.00h)', Primary Job 'None', Start Date '1/04/2020', Type 'Regular', Start Time '12:00am', End Time '1:00am', End Date '1/04/2020', Duration '1.00'. A circled '3' is over the 'Apply' button at the bottom right.

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

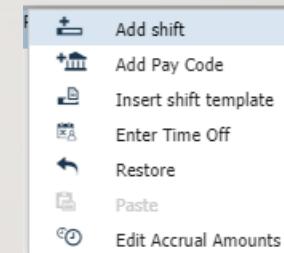
	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
<input type="button" value="+"/> <input type="button" value="X"/>	1/03/2020	Regular	10:00am	4:00pm	1/03/2020	6.00			
<input type="button" value="+"/> <input type="button" value="X"/>	1/03/2020	Regular	8:00am	10:00am	1/03/2020	2.00			

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:

Pay Code:

Amount (HH:mm):

Override Accrual Days:

Override Shift Whole Shift Partial Shift

Start Time:

Repeat for: days Transfer Job:

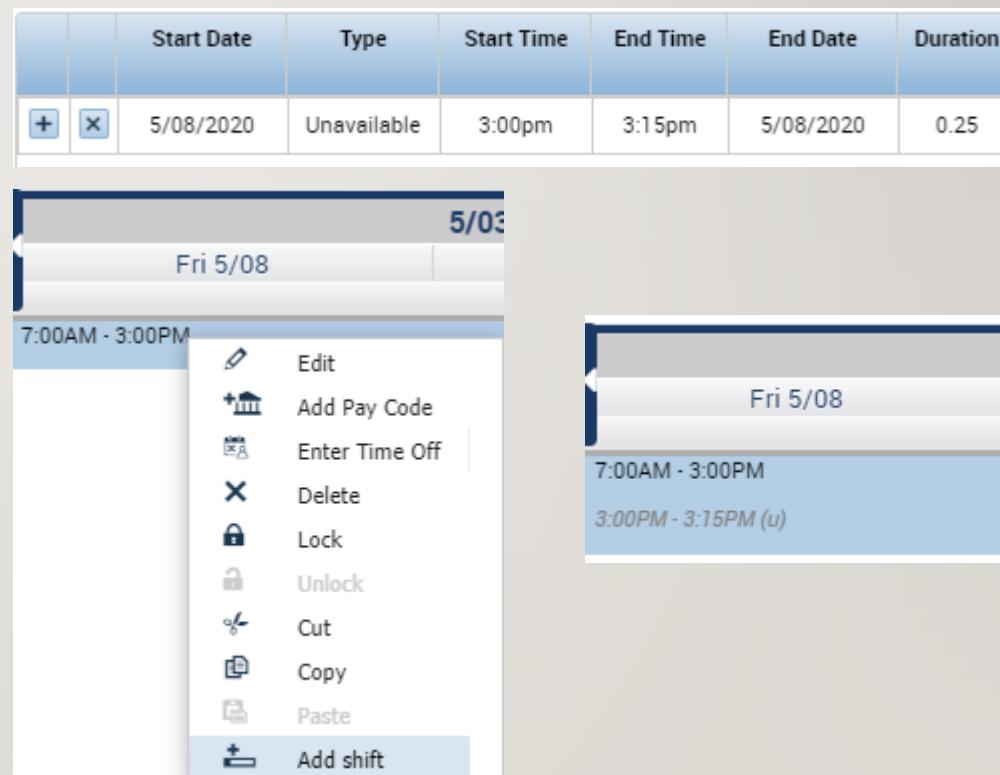
Transfer Labor Level:

Comments (0) [Add Comment](#)

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

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



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

Add Shift

Assigned to	Shift Details	Primary			
Lopez, Steven	4:00am-7:00am(3:00h)				
Insert Template	Shift Label	Repeat			
Start Date	Type	Start Time	End Time	End Date	Duration
7/01/2020	Off	4:00am	7:00am	7/01/2020	3:00

2

Wed 7/01

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.

Schedule Pattern

Assigned to
Lopez, Steven Primary job None

Start Date: 1/03/2020 End Date: 1/03/2020 Duration: Rotation

Add Pattern

Anchor Date: * 1/03/2020 Start Date: * 1/03/2020 End Date: * Clear
 Forever

Define Pattern for: * 1 Week(s) Day(s) Override Other Patterns

Add Shift | Add Pay Code | Shift Template | Pattern Template | Items in rotation | Find

	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<input type="button" value="+"/> <input type="button" value="X"/>	1							
<input type="button" value="+"/> <input type="button" value="X"/>	2							

Cancel | Apply

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.

The screenshot shows a software interface for scheduling. At the top, a toolbar includes buttons for Shift Transfer, Insert shift template, Comment, Pay Code, Copy / Paste, and Delete. A dropdown menu is open, listing various transfer positions. Below the toolbar is a list of scheduled shifts for an employee on Monday, June 1st. One shift is highlighted in red. A transfer history box on the right shows a transfer from 9:30PM to 8:00AM on June 6th to June 7th, with details: 1. 9:30PM [6:30]: Transfer /DCF/Solnit N/Custody/Willow/Willow/HeadNurse, 2. 4:00AM [0:30]: Break, 3. 4:30AM [3:30]: Transfer /DCF/Solnit N/Custody/Willow/Willow/HeadNurse.

1

Shift Transfer

Insert shift template

Comment

Pay Code

Copy / Paste

...

...Solnit N/Custody/Willow/Willow/ChldnSvcWorker

...olnit N/Custody/Willow/Willow/ChildSvcsUnSupv

...tody/Willow/Willow/LeadChildrenServicesWorker

.../DCF/Solnit N/Custody/Willow/Willow/HeadNurse

./DCF/Solnit N/Custody/Willow/Willow/Nurse

2

Shift Transfer

Insert shift template

Comment

Pay Code

Copy / Paste

Delete

Lock / Unlock

Swap

Employee

Pay Rule

Sche... Hours

Mon 1/06

9

7:00AM - 3:30PM

9:30PM - 8:00AM (x)

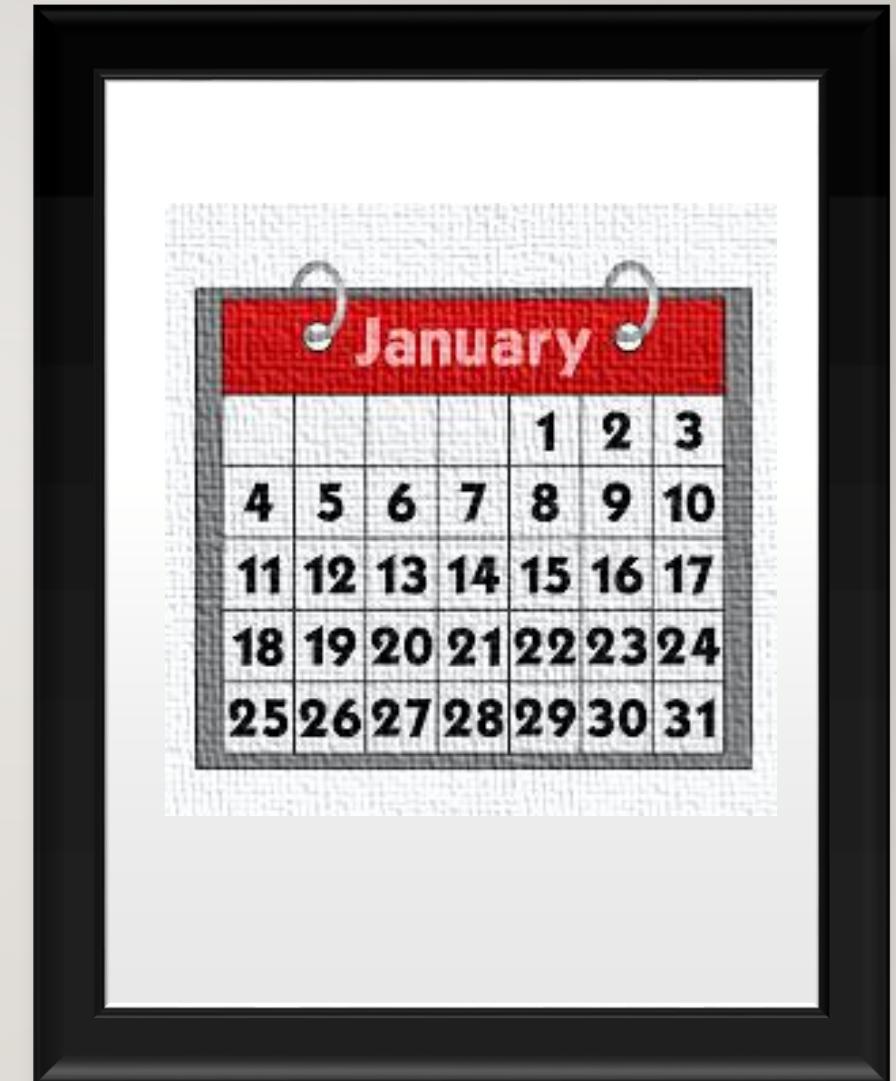
9:30PM - 8:00AM (1/06 - 1/07)

1. 9:30PM [6:30]: Transfer /DCF/Solnit N/Custody/Willow/Willow/HeadNurse

2. 4:00AM [0:30]: Break

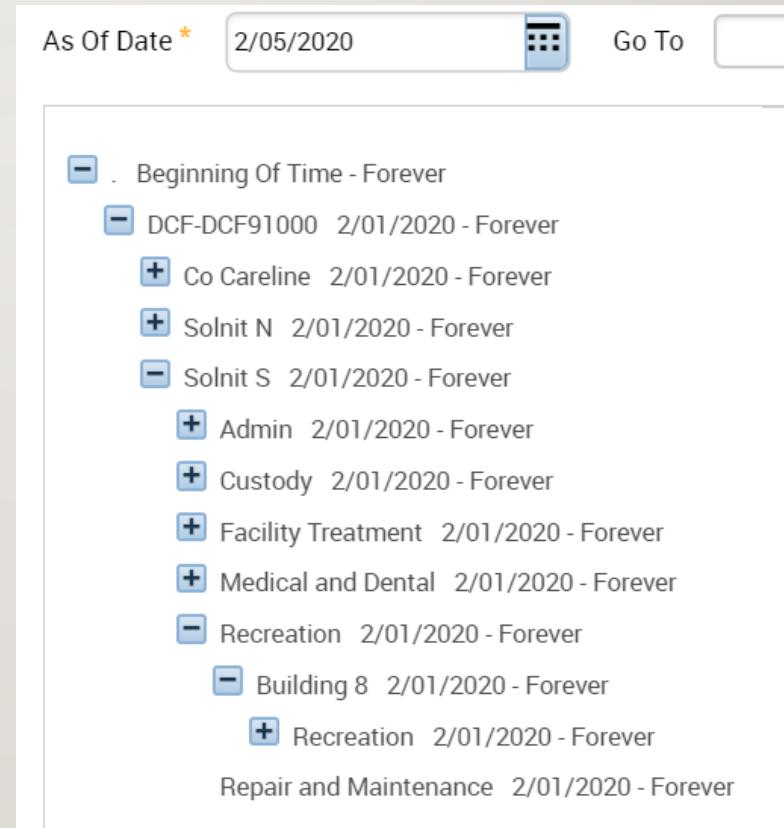
3. 4:30AM [3:30]: Transfer /DCF/Solnit N/Custody/Willow/Willow/HeadNurse

ADVANCED SCHEDULING



SCHEDULING – ORG CHART

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

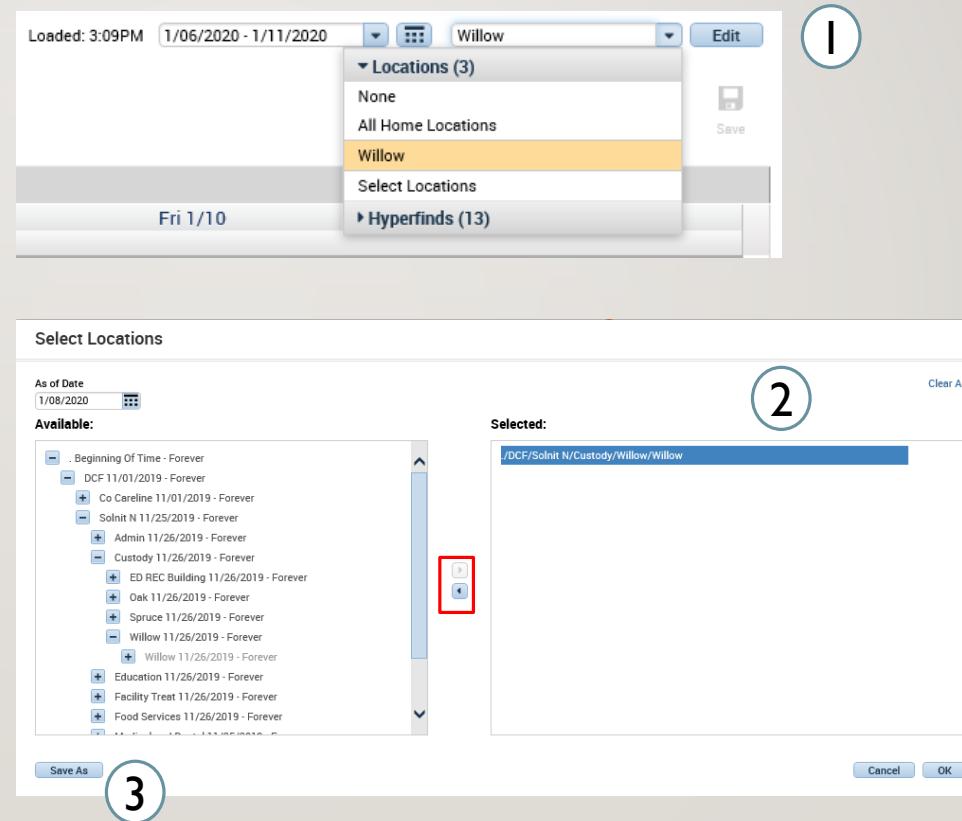


The screenshot shows a software interface for managing an organizational chart. At the top, there is a header with an 'As Of Date' field set to '2/05/2020', a 'Go To' button, and a date picker icon. The main area displays a hierarchical list of organizational units:

- 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

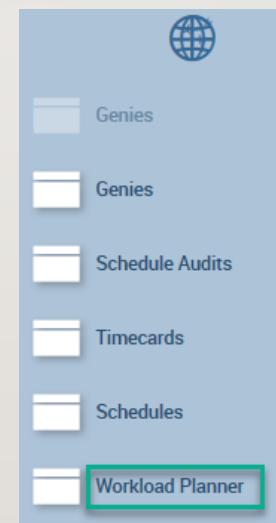
SCHEDULING –FINDING YOUR TEAM LOCATION

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

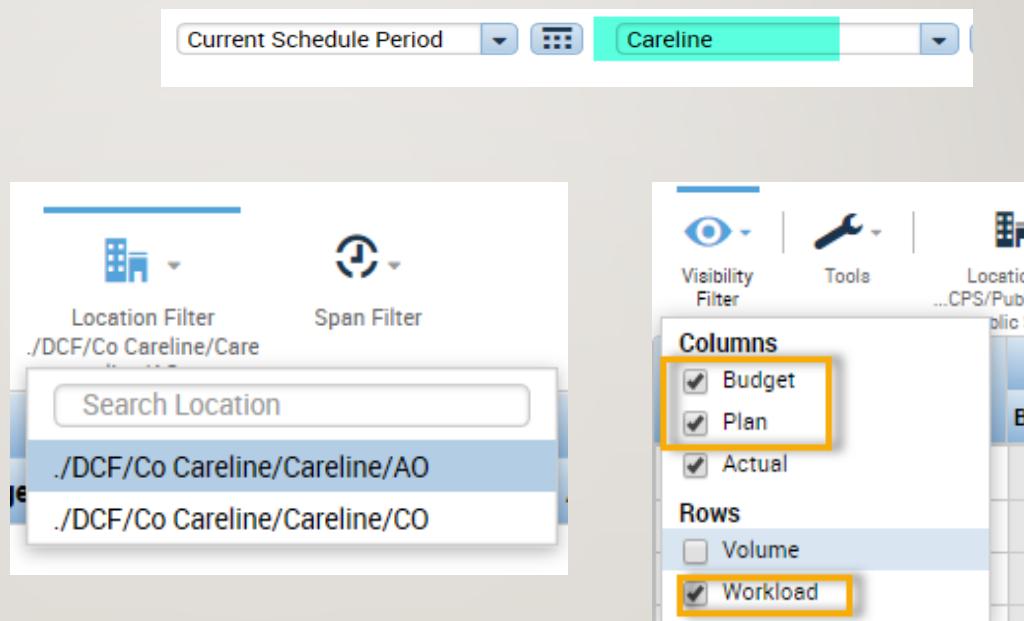
- Your staffing requirements are referred to as workload requirements in Workforce Scheduler and are stored in the Workload Planner. A Budget Workload is defined for each department. Then, when or if your staffing needs change, you can make adjustments in the Workload Planner.



	Mon 12/02		Tue 12/03			
	Budg...	Plan	Actual	Budg...	Plan	Actual
1	2	2		2	2	
2	2	2		3	3	
3	1	1		2	2	
4	-	-		-	-	

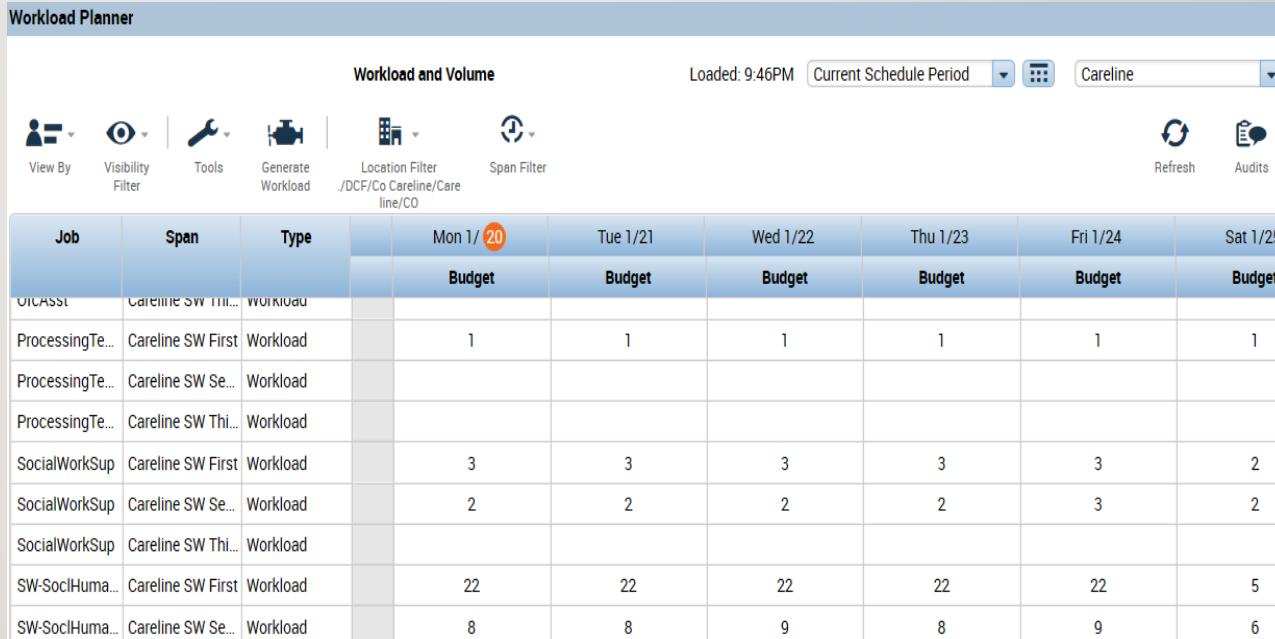
SCHEDULING – WORKLOAD PLANNER

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



The screenshot shows the 'Workload Planner' application interface. The top navigation bar includes 'Workload and Volume', 'Loaded: 9:46PM', 'Current Schedule Period', 'Careline', and 'Audits' buttons. The main interface features a grid with columns for 'Job', 'Span', 'Type', and dates from 'Mon 1/ 20' to 'Sat 1/25'. The 'Mon 1/ 20' column is highlighted with a blue header and a red '20' in a circle. The 'Type' column is also highlighted with a blue header. The grid contains data for multiple jobs, with some rows partially visible. The 'Budget' column for Monday shows values like 1, 1, 1, 1, 3, 2, 2, 22, and 8 respectively.

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
OTCASS1	Careline SW 111...	Workload						
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

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-SocHum...	Careline SW ...	5	22	22	22	22	22	5	
	Careline SW ...	6	8	8	9	8	9	6	

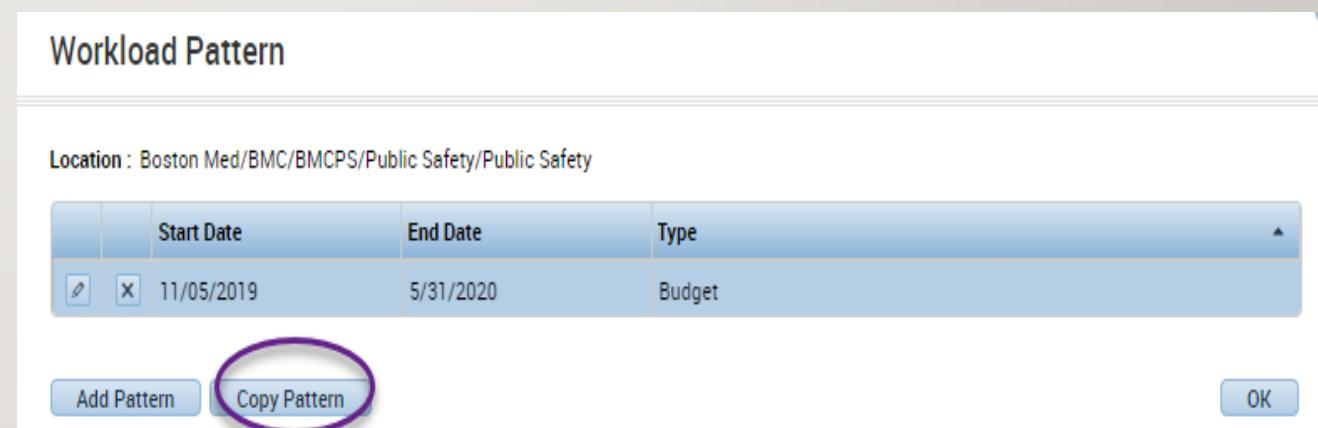
Start Date: * 1/20/2020 End Date: * 1/02/2021 Type: Budget

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

Cancel Apply

SCHEDULING – WORKLOAD PLANNER PATTERNS

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

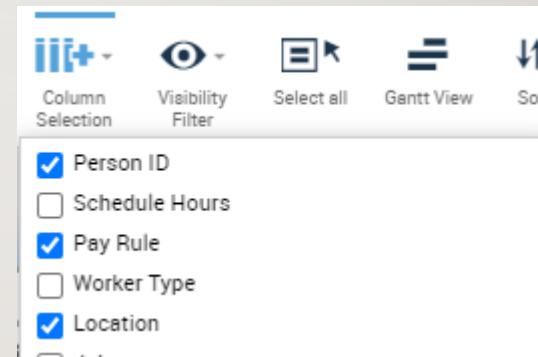


ADVANCED SCHEDULING— EXERCISE 17

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

SCHEDULING – COLUMN SETS

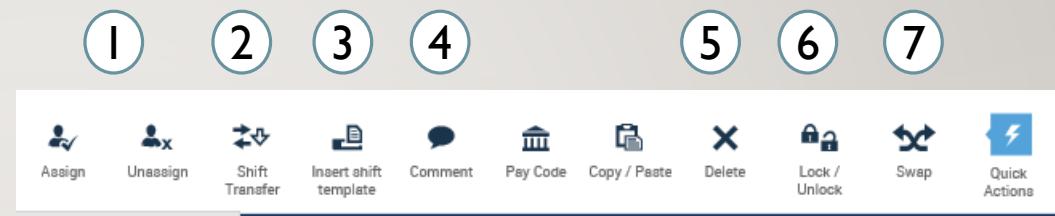
Column sets will allow you to change your view. This will help you when scheduling if you want to do so by seniority, or MOT/VOT date having both in the view would help you greatly



By Employee				
Name	Person ID	Pay Rule	Location	
Open Shifts[2] ▾				Fri 6/05
Agli, Denise L	468584	10 PT OT8 OT80dy/Building 8/Manhasset	
Ahmed, Jafreen	454596	11 PT OT8 OT40ting 8/Adolescent Health	
Avila, Brenda L	479658	Test	.../Co Careline/Careline/CO	1:30PM - 10:30PM
Ballesteras, 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	

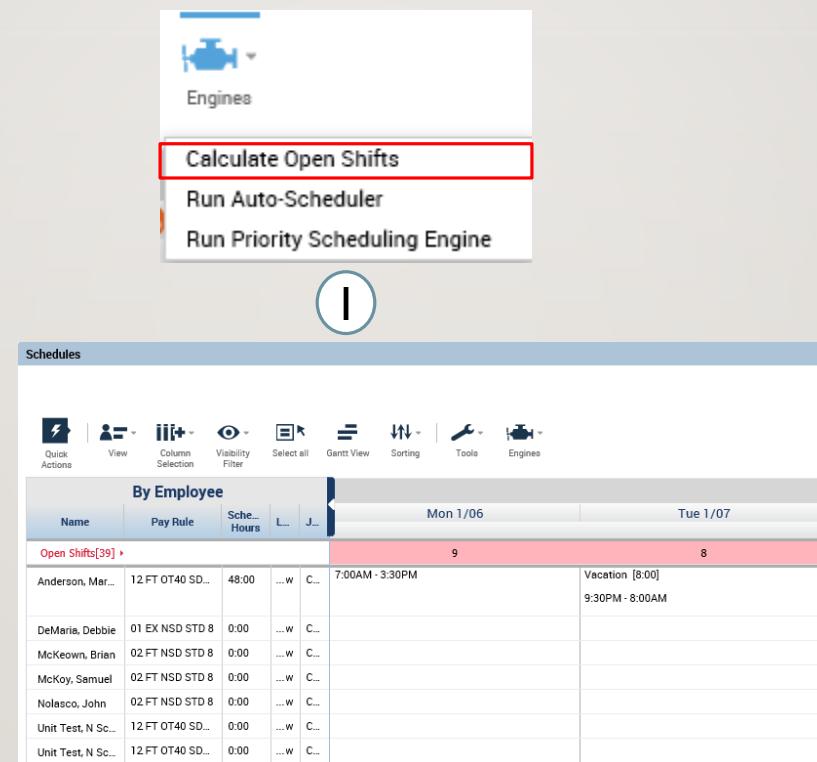
SCHEDULING – QUICK ACTIONS

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

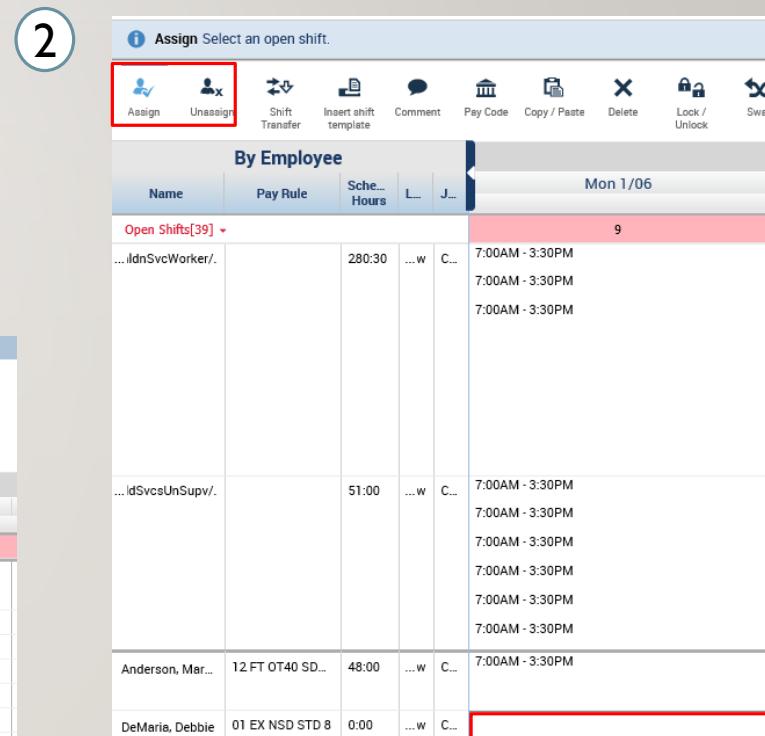


SCHEDULING – ASSIGNING/UNASSIGNING A SHIFT

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.



The screenshot shows the software interface for scheduling. At the top, there is a menu bar with various icons and a dropdown for 'Engines'. Below the menu, a red box highlights the 'Calculate Open Shifts' button in a dropdown menu. The main area is titled 'Schedules' and shows a grid of employee shifts for 'Mon 1/06' and 'Tue 1/07'. A blue circle highlights a specific shift in the grid. The grid columns include Name, Pay Rule, Schedule Hours, and several status indicators (e.g., 280:30, ...w, C...).



The screenshot shows the 'Assign' dialog box. A blue circle highlights the 'Assign' button in the top toolbar. The main area lists 'Open Shifts[39]' for an employee. A red box highlights the shift for 'DeMaria, Debbie' in the list. The dialog includes a toolbar with buttons for Assign, Unassign, Shift Transfer, Insert shift template, Comment, Pay Code, Copy / Paste, Delete, Lock / Unlock, and Swap.

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



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/Build
Ortiz, Karen	Schedule Pattern
Rau, ...	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: * 2/02/2020 Start Date: * 2/09/2020 End Date: * Forever Clear

Define Pattern for: * 2 Week(s) Day(s) Override Other Patterns

Add Shift | Add Pay Code | Shift Template | **Pattern Template**

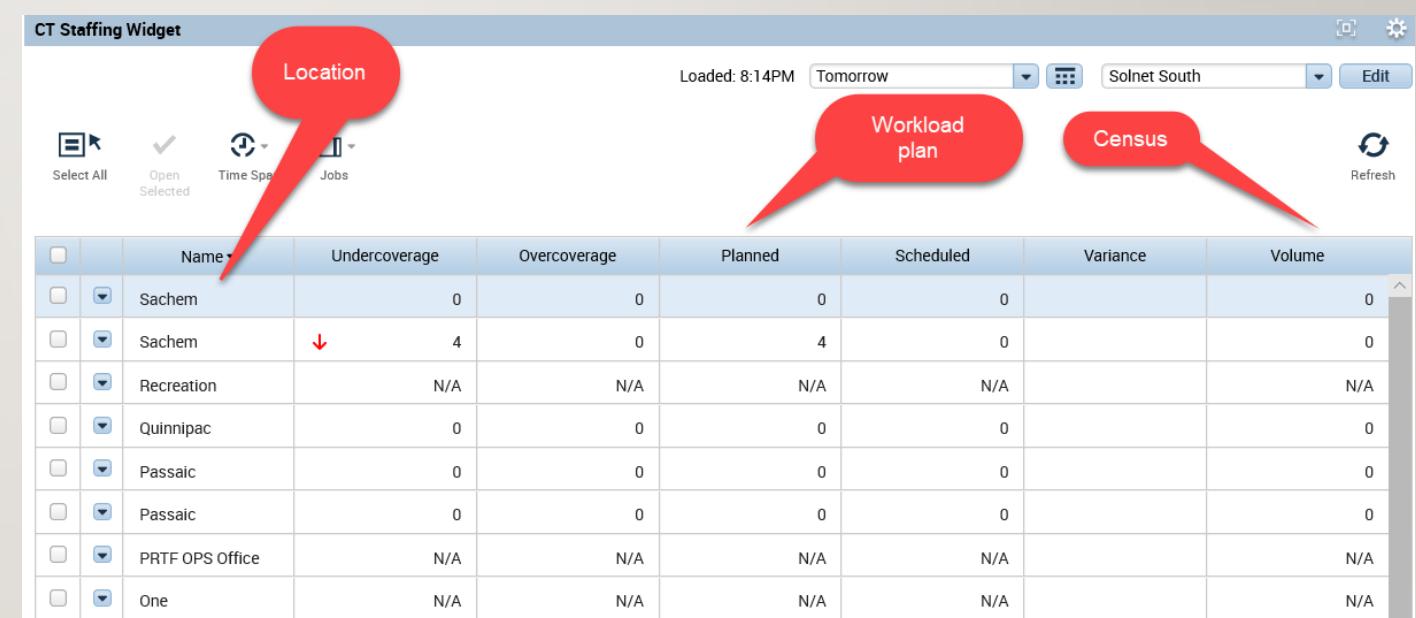
	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		7a-330p		7a-330p	7a-330p	7a-330p	7a-330p	
2			7a-330p	7a-330p	7a-330p	7a-330p		7a-330p

Cancel

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



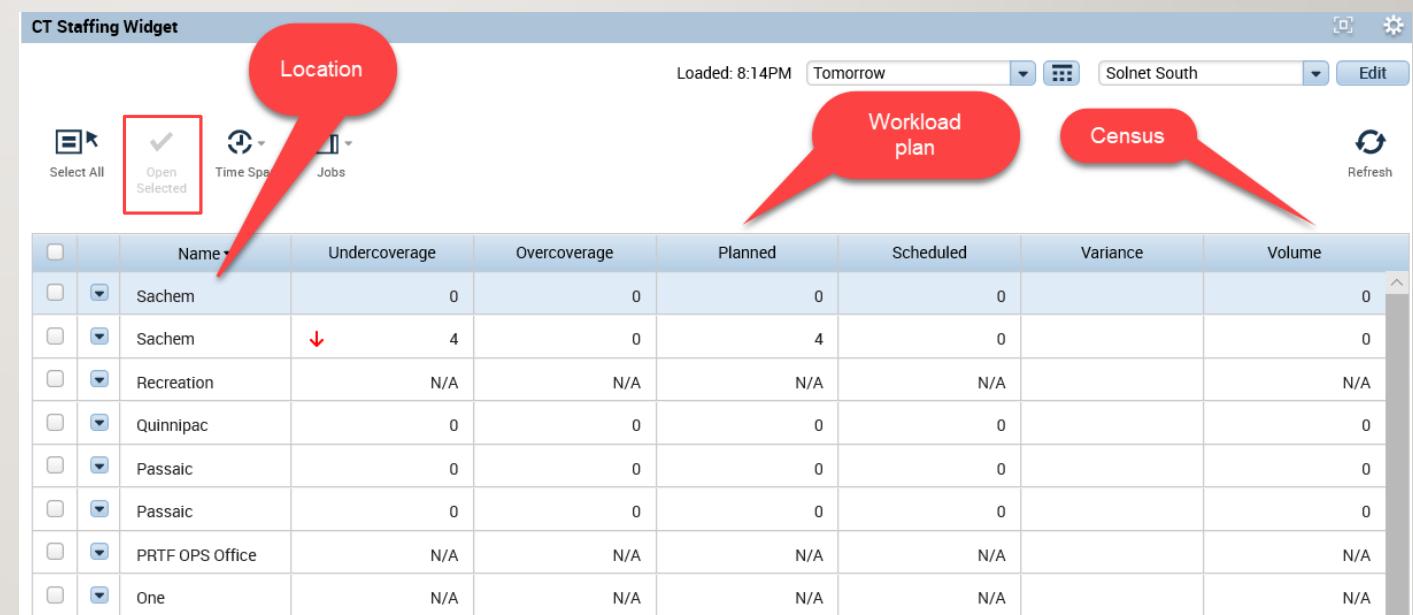
The screenshot shows the 'CT Staffing Widget' interface. At the top, there are buttons for 'Select All', 'Open Selected', 'Time Spec', and 'Jobs'. To the right, the status is 'Loaded: 8:14PM' with a dropdown set to 'Tomorrow', and the location is 'Solnet South' with a dropdown. A 'Refresh' button is also present. The main area is a table with the following data:

	Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
1	Sachem	0	0	0	0	0	0
2	Sachem	4	0	4	0	0	0
3	Recreation	N/A	N/A	N/A	N/A	N/A	N/A
4	Quinnipac	0	0	0	0	0	0
5	Passaic	0	0	0	0	0	0
6	Passaic	0	0	0	0	0	0
7	PRTF OPS Office	N/A	N/A	N/A	N/A	N/A	N/A
8	One	N/A	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, there are buttons for 'Select All' (unchecked), 'Open Selected' (checked), 'Time Span' (set to 'Tomorrow'), and 'Jobs'. A red callout 'Location' points to the 'Open Selected' button. To the right, there are buttons for 'Loaded: 8:14PM', a date dropdown ('Tomorrow'), a refresh icon ('Refresh'), and an 'Edit' button. The main area is a table with the following data:

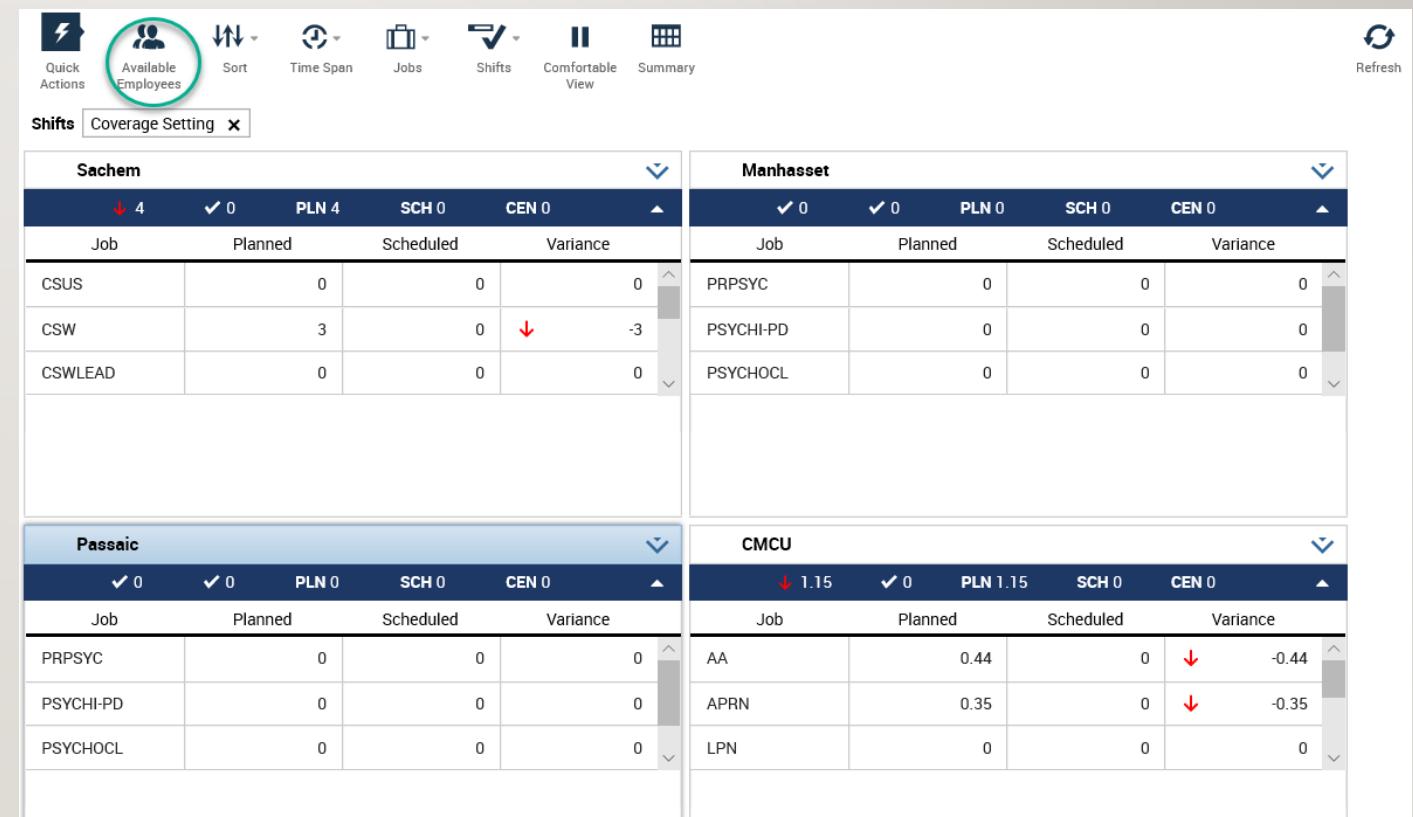
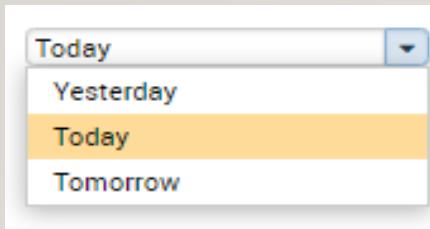
	Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
<input type="checkbox"/>	Sachem	0	0	0	0		0
<input type="checkbox"/>	Sachem	4	0	4	0		0
<input type="checkbox"/>	Recreation	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	Quinnipac	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input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

Red callouts point to the 'Open Selected' button, the 'Location' column header, the 'Workload plan' column header, and the 'Census' column header.

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



Sachem					Manhasset						
Job	Planned	Scheduled	Variance	Job	Planned	Scheduled	Variance	Job	Planned	Scheduled	Variance
CSUS	0	0	0	PRPSYC	0	0	0	PSYCHI-PD	0	0	0
CSW	3	0	-3	PSYCHOCL	0	0	0	PSYCHOCL	0	0	0
CSWLEAD	0	0	0								
Passaic					CMCU						
Job	Planned	Scheduled	Variance	Job	Planned	Scheduled	Variance	Job	Planned	Scheduled	Variance
PRPSYC	0	0	0	AA	0.44	0	-0.44	APRN	0.35	0	-0.35
PSYCHI-PD	0	0	0	PSYCHOCL	0	0	0	LPN	0	0	0
PSYCHOCL	0	0	0								

Name	Job	Schedule	Shifts	Pay Code	Time Range
Bermudez, Caterina	CSWLEAD		Open Shift	CSW	7:00AM - 3:30...
Cain, Roosevelt D	CSW			CSW	7:00AM - 11:00AM
Febles, Feliberto	CSUS			CSW	11:30AM - 3:30PM
Ferraro, Patricia	CSUS		Open Shift	CSW	7:00AM - 3:30... [2]
Ford, Darnell H	CSWLEAD		Open Shift	CSW	7:00AM - 3:30... [2]
Gardner, Leslie	CSW		Open Shift	CSW	7:00AM - 3:30... [2]
Guerrera, Jill E	CSW		Open Shift	CSW	2:45PM - 11:1... [2]
Guerrera, Robin L	CSWLEAD				
Guzman, Jorge J	CSW		Open Shift	AA	6:30AM - 3:00... [2]
Jackman, Alyssa R	CSW		Open Shift	AA	3:00PM - 5:00...
Joslin-Montlick, Eli...	PRPHYS				

Employee	Job	Shift	Details
Jackman, Alyssa R	CSW		
Jackman, Alyssa R	CSW		Primary job: ./DCF-DCF91000/Solnit S/Custody/Building 8/Manhasset/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		

SCHEDULING – CT STAFFING WIDGET – DETAIL VIEW

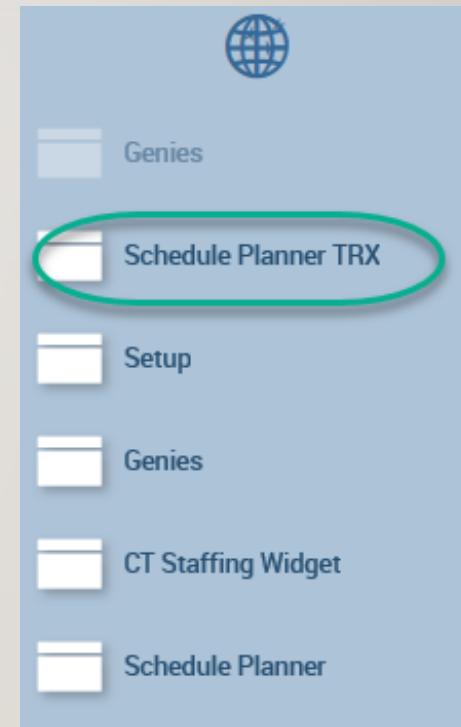
- To fill an open shift with an employee from the Employee Pool, select the employee in the pool and drag the employee to the open shift
- Pay codes, **green type** indicates a pay code. Pay codes show only for employees for whom this is the primary location under the schedule on employee list
- Hover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

ADVANCED SCHEDULER— EXERCISE 18

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

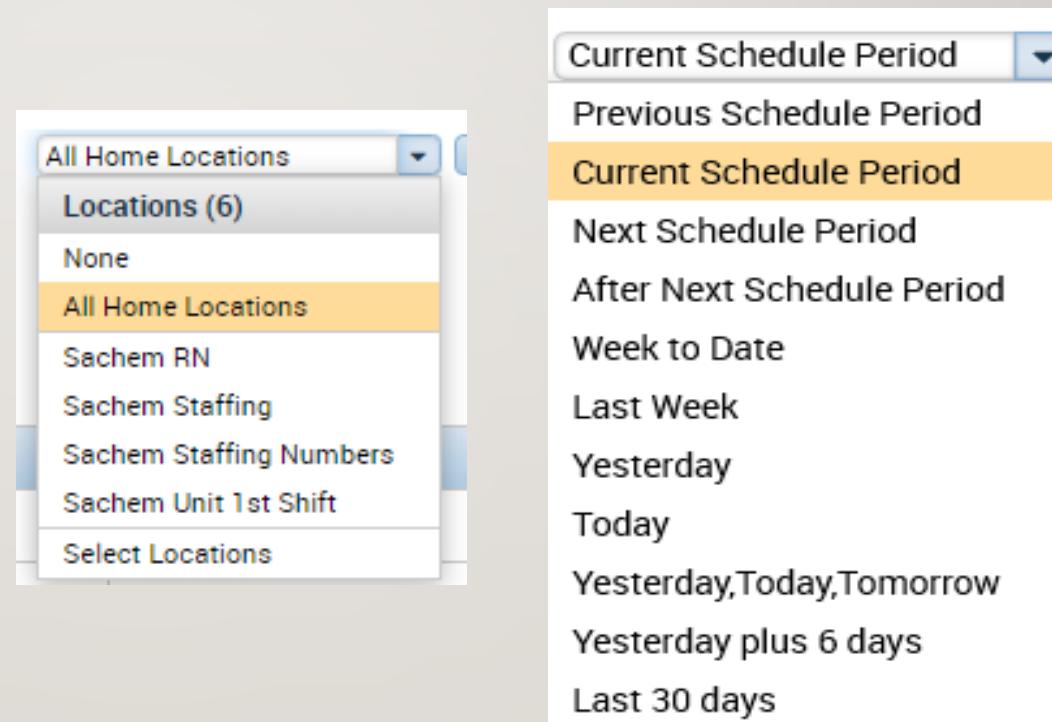
SCHEDULING – SCHEDULE PLANNER TRX

- 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.



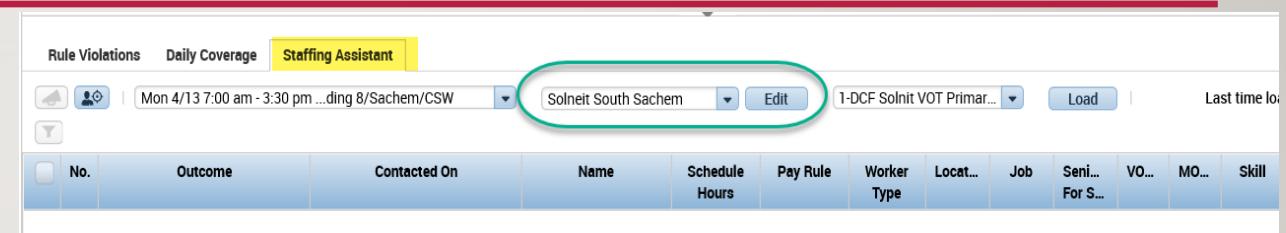
SCHEDULING – STAFFING ASSISTANT/CALL LIST

- 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 **I-DCF Solnit VOT Primary or Trx** for Voluntary Overtime click Load
- For Mandatory OT select **2-DCF MOT Solnit Primary or TRX**

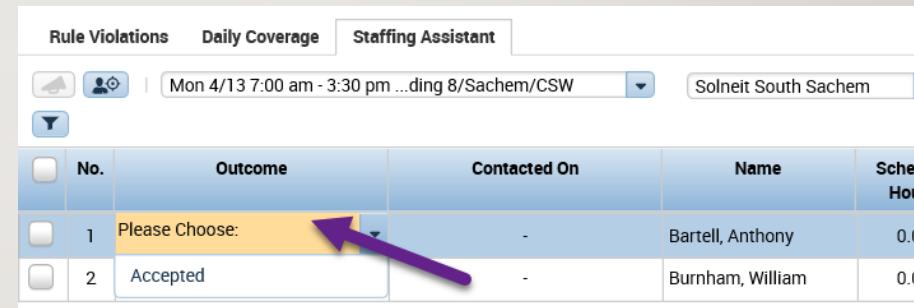


The screenshot shows a table with 5 rows of data, each representing an employee. The columns are: No., Outcome, Contacted On, Name, Schedule Hours, Pay Rule, Worker Type, Location, Job, Senior For S..., VO..., MO..., Skill, Certif... The 'Location' column is populated with 'Custody/Building 8/Sachem/.' for all employees. The 'Job' column shows 'CSW' for all employees. The 'Senior For S...' column shows dates: '1/06/1996', '2/24/1999', '1/14/2004', '3/18/2006', and '12/13/20...'. The 'Skill' column shows 'TACE, ...' for all employees. The 'Certif...' column is empty.

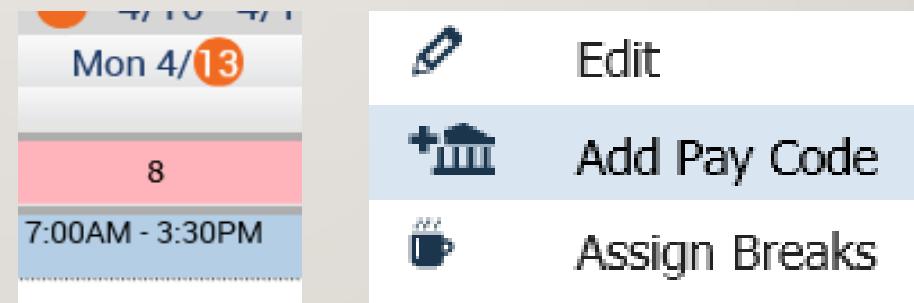
No.	Outcome	Contacted On	Name	Schedule Hours	Pay Rule	Worker Type	Location	Job	Senior For S...	VO...	MO...	Skill	Certif...
1	Select	-	Bartell, Anthony	0.00	10 FT OT8 ...	Full Time	Custody/Building 8/Sachem/.	CSW	1/06/1996			TACE, ...	
2	Select	-	Rankins, Anthony C	0.00	10 FT OT8 ...	Full Time	Custody/Building 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	Custody/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**



No.	Outcome	Contacted On	Name	Sched Hours
1	Please Choose:	-	Bartell, Anthony	0.00
2	Accepted	-	Burnham, William	0.00

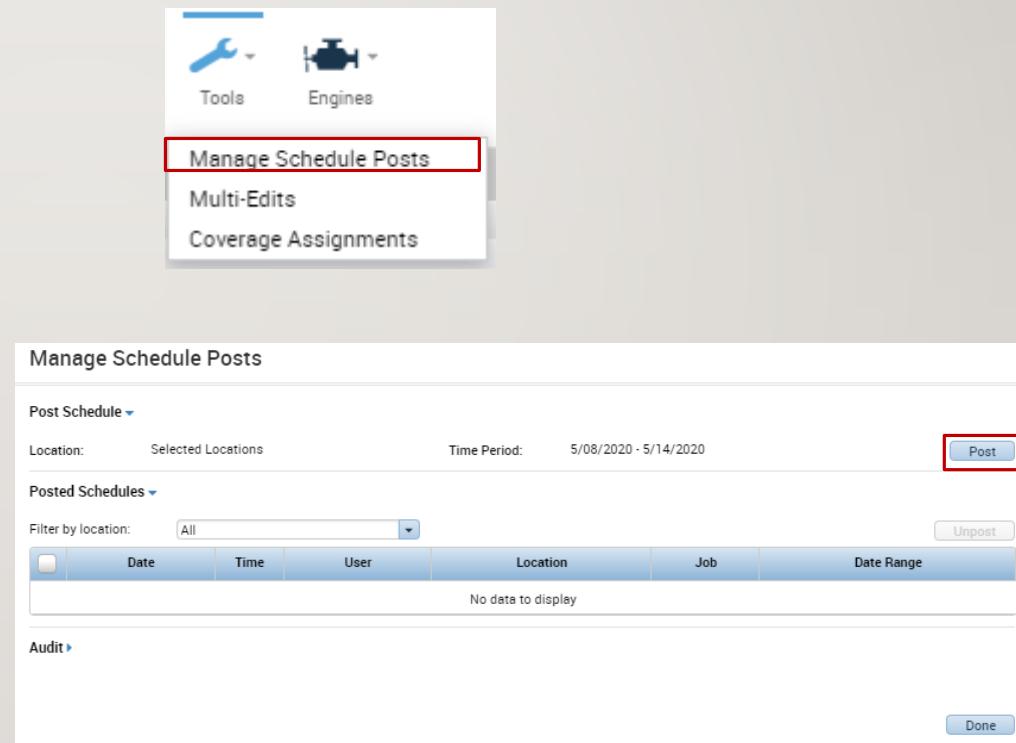


ADVANCED SCHEDULER— EXERCISE 19

PLEASE REFER TO THE
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CONCEPT

SCHEDULING – MANAGE SCHEDULE POSTS

- 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**



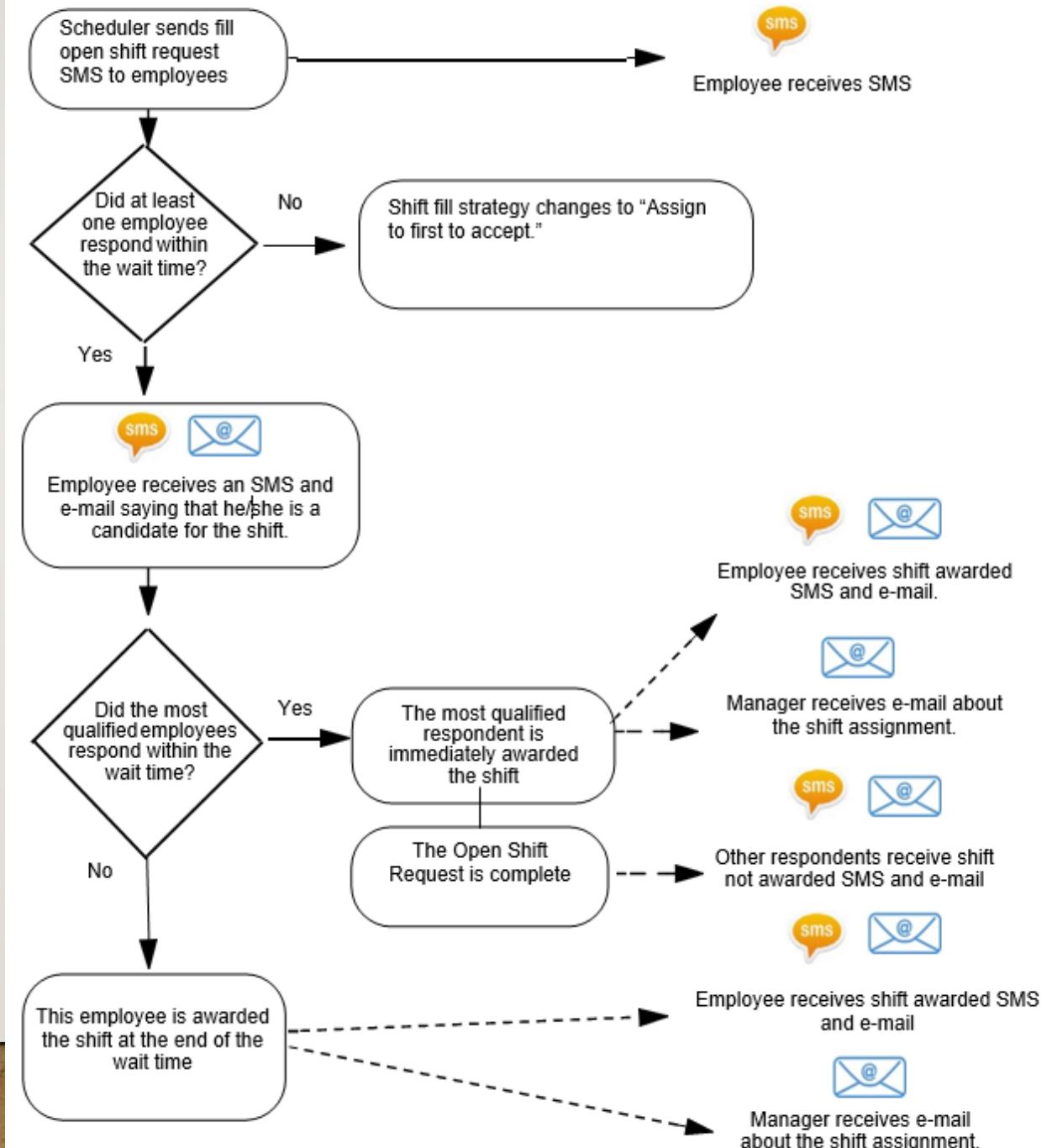
ADVANCED SCHEDULER— EXERCISE 20

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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		Solneit 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	...idy/Maple/Maple/.	CSW	CSW	6/15/2001			
<input type="checkbox"/>	2	Select	▼	-	Bermudez, Manuel To...	0.00	10 ...	Full Time	...custody/Oak/Oak/.	CSW	CSW	9/15/2003			
<input checked="" type="checkbox"/>	3	Select	▼	-	Bonfiglio, Denise M	0.00	10 ...	Full Time	...idy/Maple/Maple/.	CSW	CSW	8/26/2008			
<input checked="" type="checkbox"/>	4	Select	▼	-	McQueen, Khari	0.00	10 ...	Full Time	...y/Spruce/Spruce/.	CSW	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:

Wait Time (minutes):

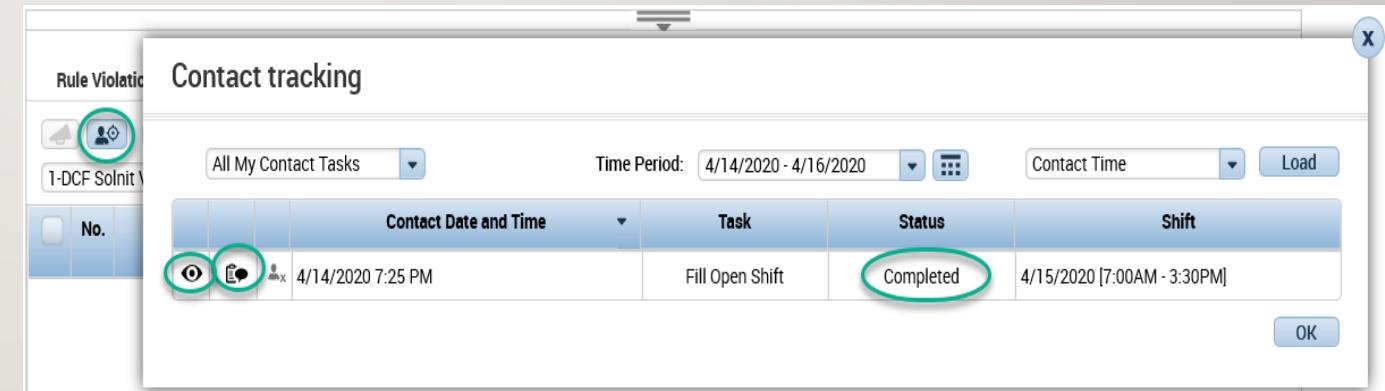
Comment:

SMS Content:

31/113 characters left

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



ADVANCED SCHEDULER— EXERCISE 21

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THE END

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