

ONEUMMS

UMMS People Planning: Scheduling Quick Guides for UM BWMC Team Members

Navigating Kronos Timekeeping

- 1 Kronos provides a Navigator page once you login that contains three components: Banner, Workspace and Related Items
- 2 The Banner displays across the top of the Navigator and serves as a starting point for viewing and editing employee information
- 3 The Workspace is located under the Banner and contains information on the task you are working on and displays information in a Widget, Wizard or Genie
- 4 A Widget is used to access specific functions and tasks, a Wizard guides you through a series of steps to complete a task and a Genie provides a summary of an employee's time and attendance data and organizes information for common tasks performed on a regular basis
- 5 To manage your own time or access other types of information, click the + tab and make a selection from the drop-down menu to open a new Workspace
- 6 The Related Items pane on the right side of the Workspace contains inactive widgets, wizards and genies
- 7 To activate an item in the Related Items pane, click on it and will display as a new tab in your Workspace

Navigating Widgets

- 1 Date & Employee Selector defines which employee group and time period is displayed
- 2 Go To navigates to other widgets or workspaces while retaining the employee group and time period selected
- 3 Choose correct Type of Request from drop down
- 4 Genie selector provides a drop-down list of additional genies
- 5 Toolbar provides actions that can be applied to the selected employee group
- 6 Share allows you to print or export the data contained in a genie
- 7 Refresh updates the active workspace with the most current database information

How to Request Time Off

- 1 Open My Calendar widget
- 2 Click on Request Time Off icon at top of calendar
- 3 Choose correct Type of Request from drop down
- 4 Choose start date by typing or using calendar
- 5 Choose end date by typing or using calendar
- 6 Choose Pay Code from drop-down based on Type of Request
- 7 Under Time Unit, exempt team members must select Full Day; non-exempt may select Hours
- 8 Review paid leave accrual balances during your request (remember, you can request more time than you have currently accrued)
- 9 Submit request using button in bottom right of window

How to Change Availability

- 1 Open My Calendar widget
- 2 Click on Request Change Availability at top of calendar
- 3 Use the drop-down menu in the Request Period box to select a predefined time period or click on the calendar icon to define your own time period
- 4 When the time period is selected, you will see the applied availability
- 5 Select days by clicking on them in the Applied Availability Grid or by choosing specific days using the calendar icon just below the grid.
- 6 Once a day is selected, the availability will be displayed below the calendar icon
- 7 Enter the start time in the Start Time box and end time in the End Time box or check the All Day box for an all-day request
- 8 Use the Type drop down menu at the top of the Request Availability Change window to set the Availability Type.
- 9 Select Apply below the Applied Availability Grid to apply the request
- 10 Gray bar of unavailable time will display on day selected
- 11 To duplicate this time selection, click the Copy/Paste button above the Applied Availability Grid
- 12 Click on the day with the availability you want to copy
- 13 Click the day(s) you want to paste availability request
- 14 Click Copy/Paste button to stop duplicating availability
- 15 After reviewing the availability request, click Submit at the bottom left corner of the window

How to Swap Shifts

- 1 Open My Calendar widget
- 2 Click on Request Shift Swap icon at top of calendar
- 3 Choose the Start Date of the day you want to swap shifts
- 4 You can now view potential shifts available to swap
- 5 Choose the shift you want to swap with your originally scheduled shift
- 6 After you submit, the request must be approved by either your manager only, or your manager *and* your coworker
- 7 Once approved, the swapped shift appears on your schedule and is noted at the top of the day in the calendar

How to Request Open Shifts

- 1 Request shifts above your scheduled shifts. Open My Calendar widget
- 2 Click on Request Open Shift icon
- 3 Select Date and a screen pops up of all available open shifts
- 4 You can now view potential shifts available to swap
- 5 Choose the shift you want to request, click Submit
- 6 After you submit, the request must be approved by either your manager
- 7 Denied will have an **x** icon in the calendar; approved will have a ✓

How to Request to Cover

- 1 Unable to work an assigned shift, but do not want to take PTO. Open My Calendar widget
- 2 Click on Request to Cover icon
- 3 Select Date and Shift
- 4 Team members available to cover will appear below
- 5 Select team member to Send Request; message will go to selected team member
- 6 Team member approves or denies the request
- 7 If approved, request will go to manager for approval then show ✓

How to Change Availability Requests

- 1 Request shifts above your scheduled shifts. Open My Calendar widget
- 2 Click on Request Change Availability
- 3 Select a predefined period or use calendar to select
- 4 Select days in availability grid or specific dates
- 5 Enter time not available
- 6 Set availability type option from menu; select Apply (use copy/paste to repeat for other days)
- 7 Denied will have an **x** icon in the calendar; approved will have a ✓

How to Self-Schedule (Available via Web Only)

- 1 Open My Calendar widget
- 2 Select Next Schedule Period from Time Period drop-down
- 3 Click on Request Self Schedule icon at top of calendar
- 4 Click to create a ✓ in the box for each day and shift to schedule
- 5 To see more dates, click the right-facing arrow next to date range above the calendar
- 6 When finished, click Submit in top right of screen
- 7 Your self-schedule requests are noted at the top of each day in the calendar

Labor Account and Work Rule Transfers

- 1 Open the Current Schedule widget
- 2 Open the Shift Editor by right clicking on the cell where the transfer is needed
- 3 To perform a Labor Level Transfer, select the drop-down menu under the Labor Level Transfer heading and then click Search
- 4 In the Transfer window, select the appropriate labor account
- 5 To perform a work rule transfer, select the drop-down menu under the Work Rule Transfer heading
- 6 Select the appropriate work rule, scrolling down if necessary