ONEUMMS

UMMS People Planning: Scheduling
Quick Guides for Managers & Scheduling Administrators

Navigating the Staffing Widget

1	The Staffing Widget allows you to quickly compare your budgeted workload and staffing plan to your scheduled resources all in one place
2	It has two main areas: The Header and the Workspace
3	Time Period controls whether you are viewing Yesterday, Today or Tomorrow's staffing needs
4	Available Employees lists employees who are qualified and indicated they are available to work an open shift in Kronos Employee Self-Service
5	Display Filters allows you to select the criteria to display in the workspace
6	Quick Actions streamlines the process of editing schedules in the widget by providing a series of icons used to edit schedules
7	Coverage Bar displays a summary of the coverage status, designated by the color of the arrow
8	Schedule Data lists employees scheduled to work on the date selected and any open shifts available
9	Employee Query controls the group of employees that the Staffing widget displays

Working with Mobile Requests

1	From the Kronos Mobile App, select Manage Requests
2	Select a request to review
3	Approve or reject the request
4	The Requests Toolbar allows you to view and act on request

Working with Desktop Requests

1	The alerts section is located at the top of the screen in the Banner
2	The Requests Manager alert displays any time off or other request types from your team members which require your review and action
3	The Requests Widget is divided into three main sections: The Toolbar, the Request Grid and the Request Tabs
4	The Requests Toolbar allows you to view and act on requests
5	The Requests Grid displays all the requests from employees to whom you have access
6	The status column in the request grid displays the current state of the request
7	To approve, select a request from the list, click Approve and review the dialog box that displays the update the requested dates, pay code and time unit.
8	To view requests you responded to, select the status drop-down menu and choose which status you wish to see

Working with Scheduled Groups

1	Open the Current Schedule widget
2	Click View on the Toolbar and select By Scheduled Group
3	Change the time period to match the Scheduled Group you wish to manage
4	To add employees to a group if they are not assigned, click the + or – symbol next to the group name, right click on the employee and select Add to Group
5	In the Add to Group window, select an available schedule group and also choose a start and end date that the employee will belong to the group
6	To remove an employee from a group, right click on the employee and select Remove from Group
7	The Remove from Group window will display the time period that the employee will not belong to the group

Scheduling Pay Codes

1	Open the Current Schedule widget
2	Right click on the cell where you want the pay code to be inserted and select Add Pay Code
3	Use the menus in the Pay Code Window to select the appropriate pay code and other details
4	Within the Schedule Pattern editor, click Pattern Template and select the template from the list or create a pattern template for an employee if a template is not available
5	To delete a pattern, open the Schedule Pattern and then click the X button on the row that contains the unneeded pattern

Basics of Setup Tasks

1	Open the Current Schedule widget
2	Skills can be found in the employee information under the skills column or by hovering over an employee's name
3	Open the Workload Planner from the Related Items pane
4	The Workload Planner includes two areas: The Header and the Workspace
5	The Header contains components which allow you to determine which timeframe and locations to view
6	The Workspace allows you to view the staffing plan for your location

Evaluating and Balancing a Schedule

1	Open Current Schedule
2	Click on the Show More Content button in the middle of the screen below the schedule grid
3	Select from Daily Coverage, Staffing Assistant and Rule Violations
4	Daily Coverage helps you evaluate the schedule and determine coverage options for the next schedule period
5	Staffing Assistant tab allows you to select employees to fill open shifts based on a configured procedure set
6	Rule Violations tab displays details if a schedule breaks predefined scheduling rules

Working with Schedule Patterns

1	Open the Current Schedule widget
2	Right click on an employee and select Schedule Pattern
3	If the employee does already have a pattern assigned, a summary screen displays where you have access to add, edit or delete a pattern
4	Within the Schedule Pattern editor, click Pattern Template and select the template from the list or create a pattern template for an employee if a template is not available
5	To delete a pattern, open the Schedule Pattern and then click the X button on the row that contains the unneeded pattern

Generating Open Shifts

1	Open the Schedule Generator by clicking the Engines icon from the Current Schedule
2	Use the Calendar icons to select the Start and End Dates for the time period you want to create open shifts
3	Select one of the settings from the Settings drop-down list and click Start

Create Open Shifts

1. Open Current Schedule
2. Right click the pink Open Shifts row on the day you want to create a shift
3. Select Add Shift and complete the new shift requirements, including a Job Transfer to define the job.

Editing Shifts

1. Open the Current Schedule widget
2. Add and edit shifts using the Shift Editor, Shift Template or In-Cell Entry
3. In-Cell entry, located Tabular view of the Schedules Widget, is used to enter a simple shift that has no special attributes
4. Locate the shift you want to edit then select either the shift start or end time and enter the new time.
5. To use Shift Templates, click the cell under the date where you want to add a shift, select Insert shift template and pick from the list of available shifts
6. To delete a shift, right-click the shift you want to delete, and select Delete from the menu

Managing Employee Request

1. Open the Current Schedule, click on the Tools icon at the top and select Manage Employee Request Periods
2. The Manage Employee Request Periods tools allows you to view information about requests and manage them

Deleting and Unassigning a Shift

1. Open Current Schedule
2. Right-click the shift and select Delete if an employee is no longer working a specific shift and the shift does not need to be filled
3. Right-click the shift and select Unassign if an employee's schedule changes and you need to fill the shift