

## UMMS PEOPLE PLANNING: ADVANCED SCHEDULING CHARGE VIEW JOB AID

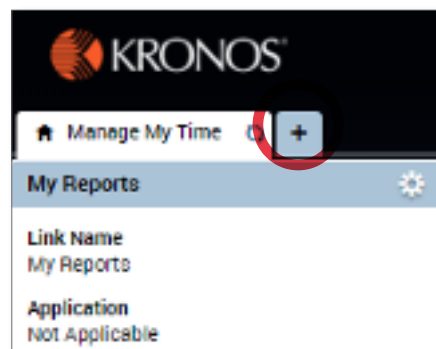
LOGIN URL: <https://umm.kronos.net/wfc/logon>

Enter your username and password. If this is your first time login, your password will be “UMMS+last 4 digits of your SS#” and you will then be prompted to change your password.

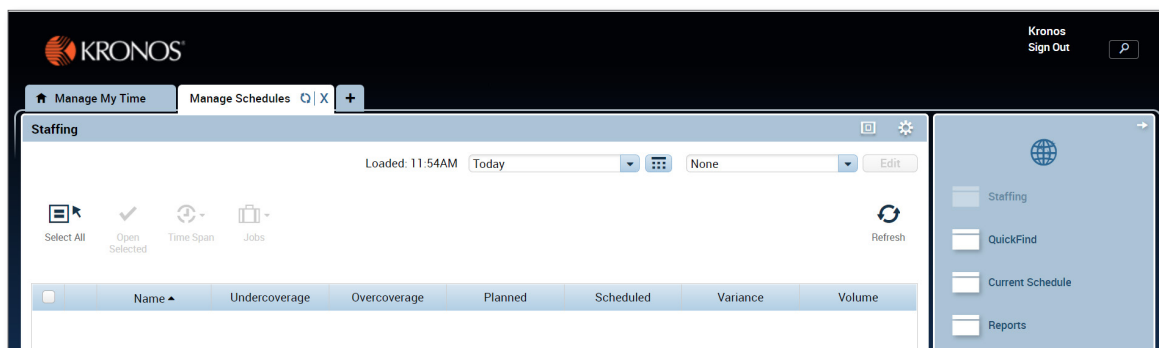


### CHARGE VIEW FUNCTIONS

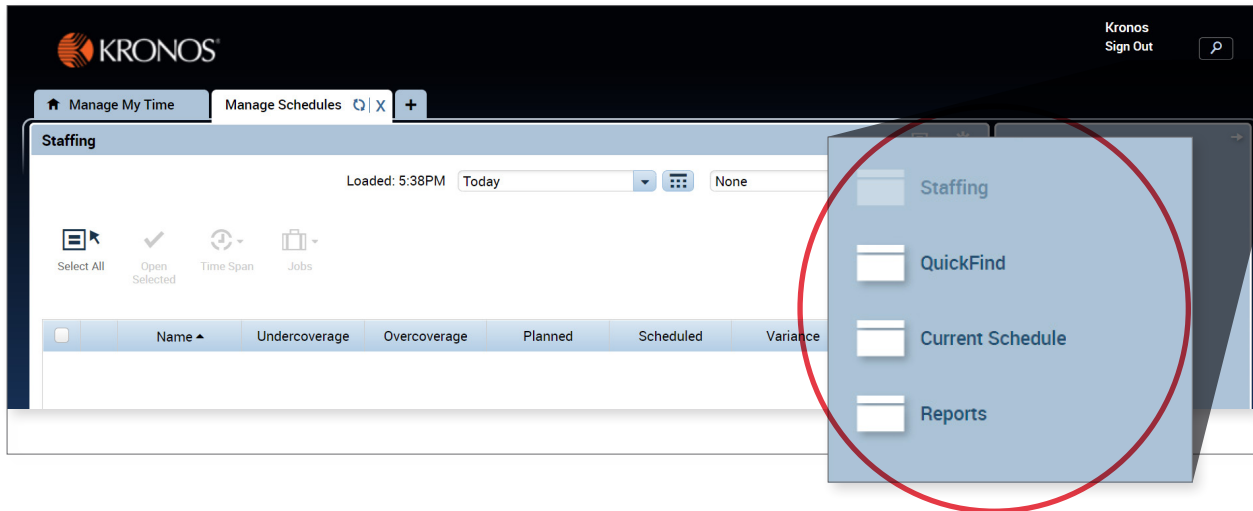
Regardless of what the initial “Manage My Time” workspace looks like, to access Scheduling Functions, **click on the “+” tab** in the upper left-hand corner:



The “Manage Schedules” workspace becomes visible, with the “Staffing Widget” displaying in the main space



Other workspaces are accessible from the “Related Items Pane” to the right:



## Locate an Employee using QuickFind

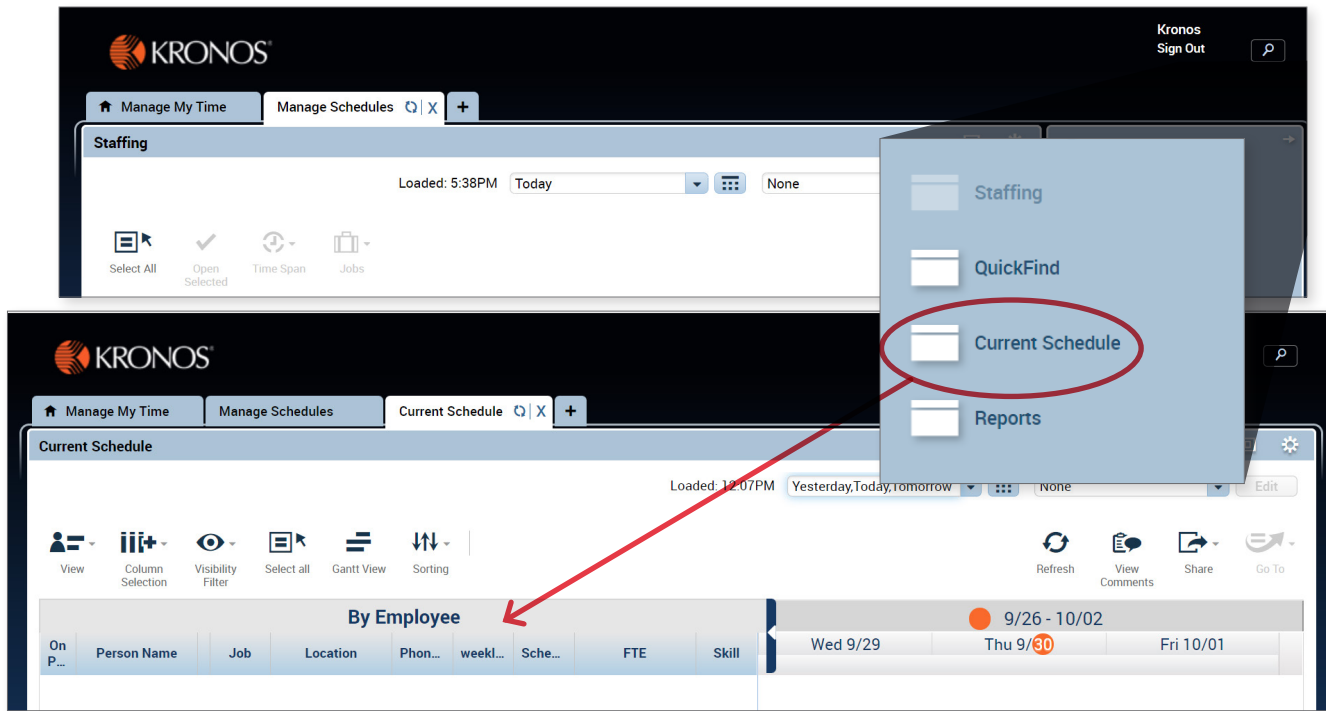
To access, **click and drag “QuickFind” to the center space.**

To locate an employee, enter either their person id or last name after the \* and select time period.

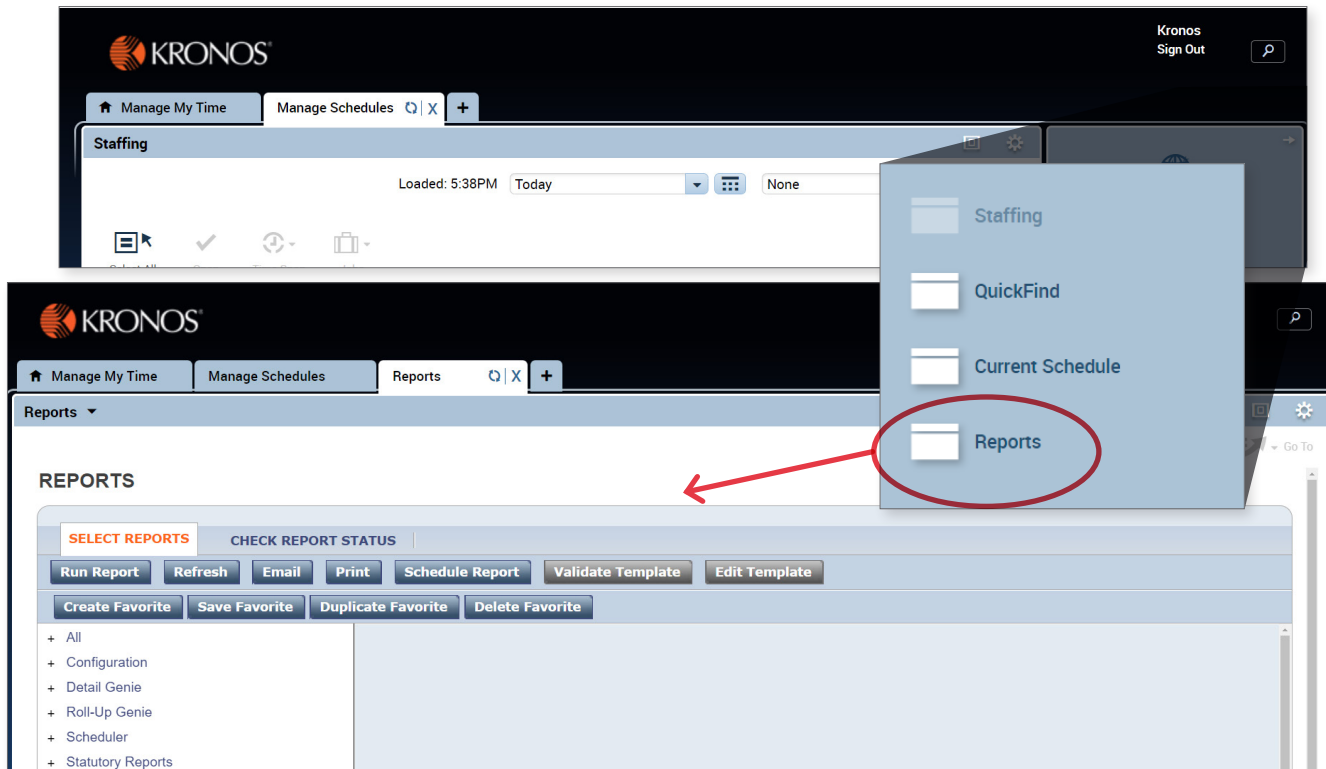
Click on the spyglass and located employees will appear below.



To access “Schedules,” **click and drag “Current Schedule” to the center space:**



To access “Reports,” **click and drag “Reports” to the center space:**



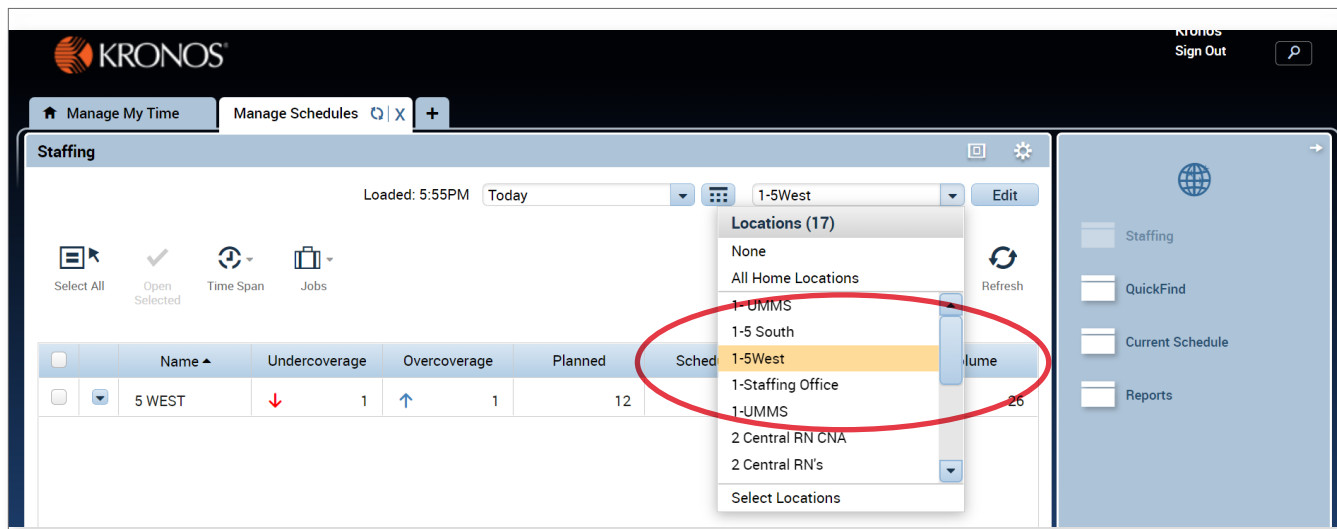
For instructions on running and viewing reports see the separate Running Reports job aid.

## STAFFING WIDGET

The Staffing widget is the tool used to quickly compare your budgeted workload and staffing plan to your scheduled resources all in one place. The Staffing widget allows you to operate optimally across units with your available budget and staffing resources.

It is comprised of a Summary Screen and Unit Detail

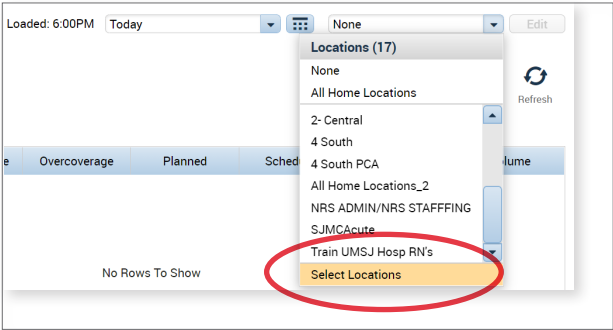
Below is the Summary Screen, blank until you select a location. This gives you a quick view of the status of staffing coverage for this location and day.



**Select Location** to display – can use “All Home Locations” or create a custom location to display fewer

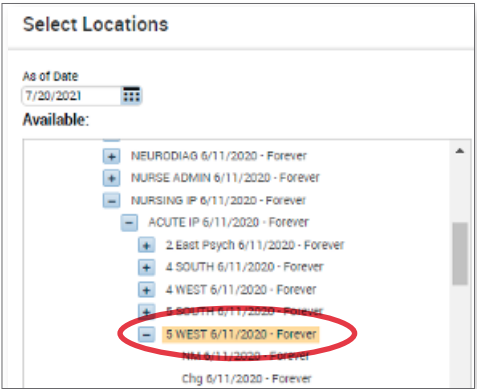
## CREATE CUSTOM LOCATION:

Click on "Select Locations"

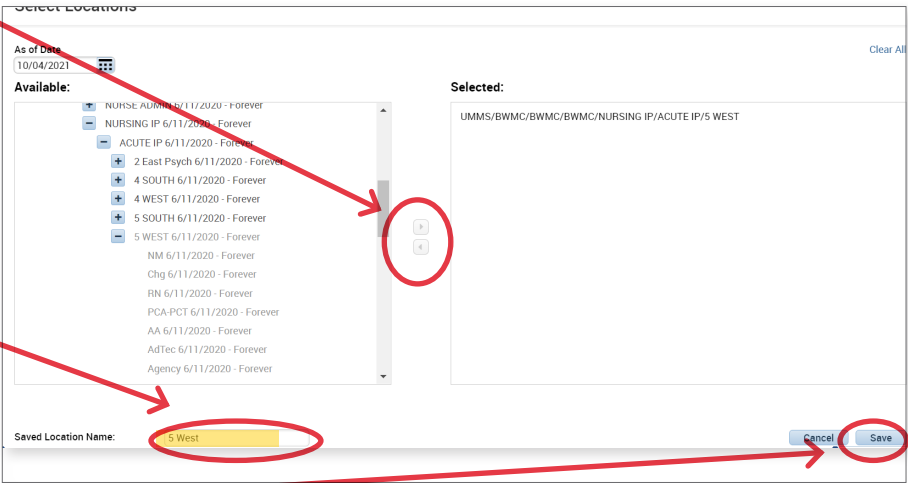


Expand location by click on "+"

Highlight desired location

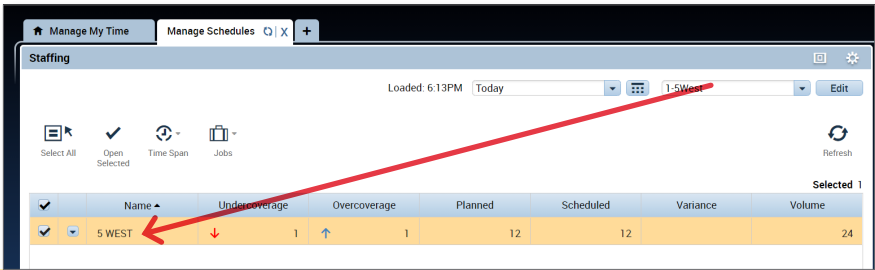


Click on arrow to move to right side



Save to Location Name - Add

Click on Save again



Snapshot view of Under or Over coverage. The red down arrow indicates Undercoverage for this location, Overcoverage is neutral.

Name	Undercoverage	Overcoverage
5 WEST	↓ 1	0

Numbers from Workload Planner

Planned	Scheduled
1	0

Variance and Volume (volume = census)

Variance	Volume
	0

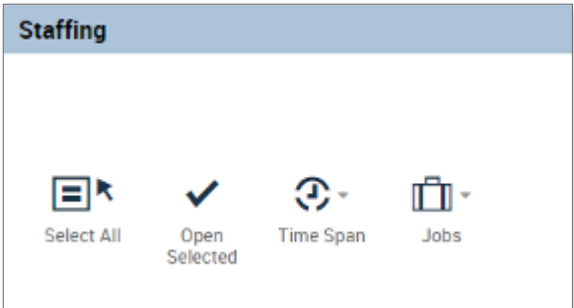
## ICONS ON SUMMARY PAGE

**Select All:** To select all displayed locations below

**Open Selected:** Displays unit detail for selected locations

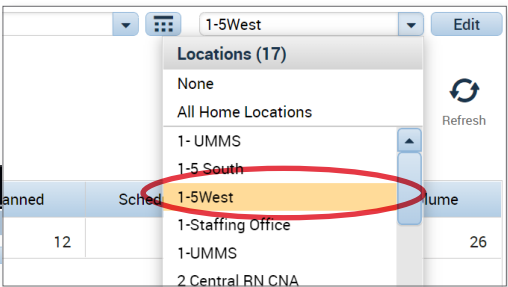
**Time Span:** All day, zones, shifts or custom time span

**Jobs:** Select all or specific jobs to view staffing detail for



To view unit detail, **click checkbox** Select All or individual locations

**Click Open Selected**

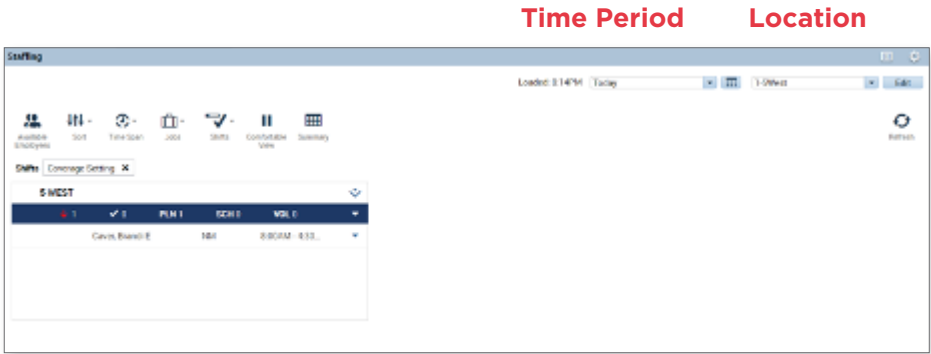


Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
5 WEST	↓ 1	↑ 1	12	12		24

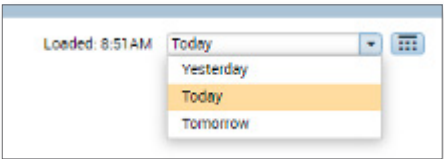
## OPENED LOCATION(S) DISPLAYED:

The Staffing widget includes two main areas:

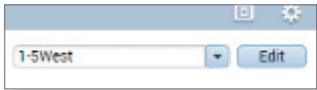
- 1) header
- 2) workspace



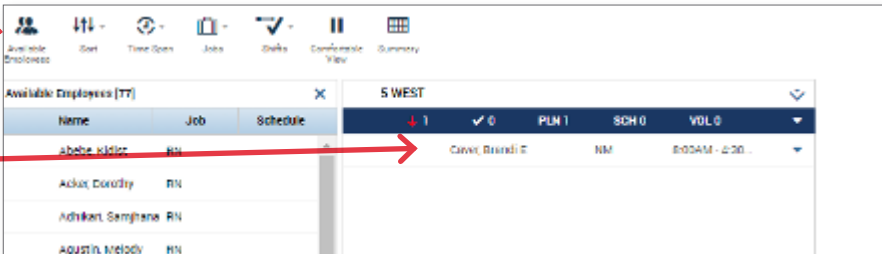
**Time Period:** Controls whether you are viewing Yesterday, Today or Tomorrow's staffing



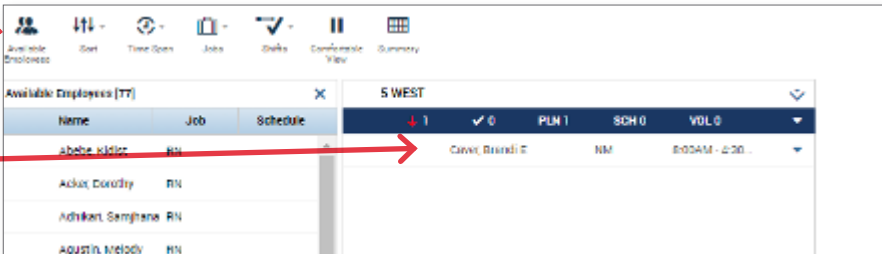
**Location Query:** Controls the locations that the Staffing widget displays



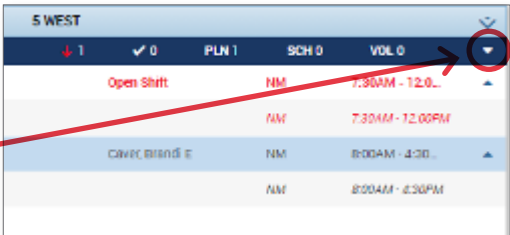
**Available Employees:** Lists employees who are qualified and are not scheduled within shown units



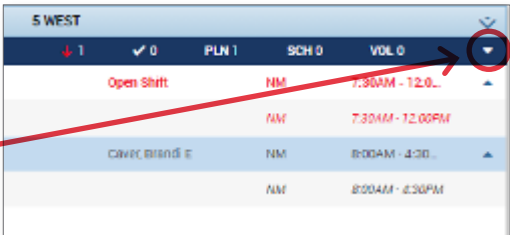
**Coverage Bar:** Displays a summary of the coverage status, designated by the color of the arrow - shows understaffed by 1 - see 2 screenshots down



**Schedule Data:** Lists employees scheduled to work on the date selected and any open shifts



**Coverage Data for all jobs:** click on up caret on header



ADDITIONAL FUNCTIONS BY CLICKING ON ICONS:

Available Employees

Sort

Time Span

Jobs

Shifts

Comfortable View

Summary

Sort

Time Span

Jobs

Shifts

view by All Shifts or Coverage Setting:

Comfortable View (units scroll across) **click on**

Available Employees

Sort

Time Span

Jobs

Shifts

Compact View

Summary

Shifts Coverage Setting x

Unit 1

Unit 2

Unit 3

Unit 4

Unit 5

Unit 6

Unit 7

Unit 8

Unit 9

Unit 10

Unit 11

Unit 12

Unit 13

Unit 14

Unit 15

Unit 16

Unit 17

Unit 18

Unit 19

Unit 20

Unit 21

Unit 22

Unit 23

Unit 24

Unit 25

Unit 26

Unit 27

Unit 28

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Unit 84

Unit 85

Unit 86

Unit 87

Unit 88

Unit 89

Unit 90

Unit 91

Unit 92

Unit 93

Unit 94

Unit 95

Unit 96

Unit 97

Unit 98

Unit 99

Unit 100



Compact View (multiple rows on page) **click on**

The screenshot shows the ONEUMMS interface in Compact View. The top toolbar contains icons for Available Employees, Sort, Time Span, Jobs, Shifts, Comfortable View (circled in red), and Summary. Below the toolbar, the main area displays a grid of shift schedules for different locations: 2 East Psych, 4 WEST, 5 WEST, 4 SOUTH, and 5 SOUTH. Red arrows point from the 'Comfortable View' icon to the grid.

Return to Summary Screen **click on Summary**

The screenshot shows the ONEUMMS interface in Summary View. The top toolbar contains icons for Available Employees, Sort, Time Span, Jobs, Shifts, Comfortable View, and Summary (circled in red). Below the toolbar, the main area displays a table with columns: Name, Undercoverage, Overcoverage, Planned, Scheduled, Variance, and Volume. Red arrows point from the 'Summary' icon to the table.

Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
2 East Psych	0	1	0	1	0	0
4 SOUTH	6	0	6	0	0	0
4 WEST	0	0	0	0	0	0
5 SOUTH	0	0	0	0	0	0
5 WEST	1	0	1	0	0	0
6 SOUTH	7	0	7	0	0	0
6 WEST	12	0	12	0	0	0

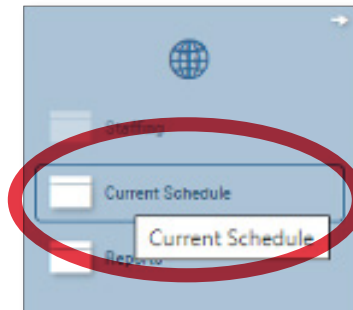
## SCHEDULE PLANNER

The Schedule Planner give a larger view of the 3-day scheduling period than the Staffing Widget, with multiple days visible at once.

When in Manage Schedules workspace, navigate to the far-right column with the globe at the top ("Related Items" pane)



**Click on "Current Schedule"** and drag to the center workspace



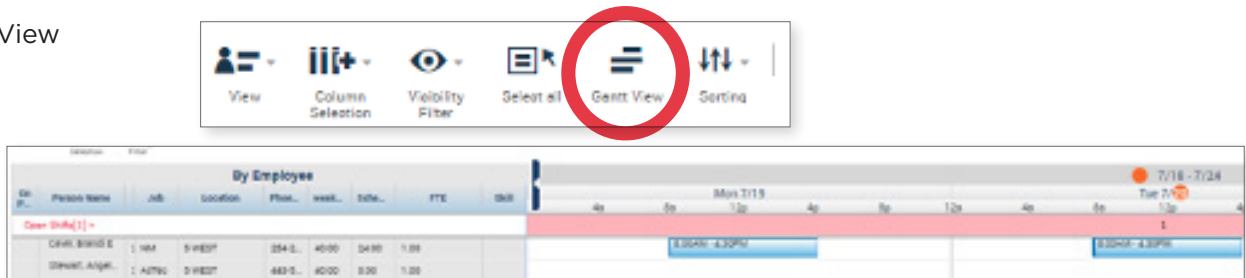
**Click on second drop down** box to select a location



## Tabular View (Default)

Person Name	Job	Location	Phone	FTE	Shift
Caver, Brandi E	1	100	254-2...	1.00	100
Stewart, Angel	1	100	443-5...	1.00	100
Dirubbo, Steph	1	100	443-5...	1.00	100
Boone, Whitney	1	100	443-5...	1.00	100
Acker, Dorothy	1	100	410-7...	1.00	100
Bobb, Pamela	1	100	410-7...	1.00	100
Alken, Mercy	1	100	301-3...	1.00	100
Queen, Ivy	1	100	410-5...	1.00	100
Ford, Jessica	1	100	410-2...	1.00	100
Glaze, Tracey A	1	100	301-5...	1.00	100
Agustin, Melody	1	100	240-6...	1.00	100

## Gantt View



Other functions available by clicking on any of these icons:

**View**

**Column Selection**

**Visibility Filter**

**Sorting**