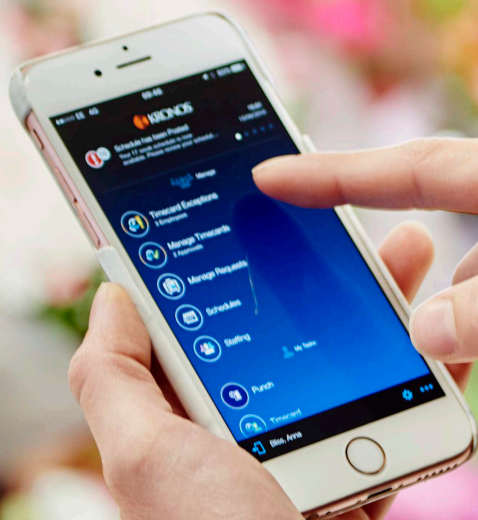




Auto-scheduler User Guide



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- 8** How to view your schedule
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- 21** How to shift swap
- 26** How to give feedback

You can find all guides, video guides and FAQs under
'auto-scheduler' on the Kronos page of Colleagues Connect

How does scheduling work?

This section includes information on:

- What scheduling is and how it works
- Why it has been introduced
- What it means for you
- What happens if someone calls in sick
- What happens if you have training or a meeting
- What happens with holidays
- What you can do now with auto-scheduler
- What you should do if you have any questions

What is Scheduling and how does it work?

Auto-scheduling ensures we have the right people working, in the right place, at the right time. The system will schedule colleagues to work based on certain criteria:

- The contracted hours of colleagues
- The availability and skills of colleagues
- Specific store data, including: sales, special events, opening hours etc.

The schedules will be created 4 weeks in advance and will look at Volume and Labour Forecasts before generating the schedule.

Volume Forecast

This forecasts the amount of sales in your store. It can be influenced by special events such as member days or bank holidays



Labour Forecast

This forecasts how many hours are required based on the amount of sales estimated*



Auto-Scheduler

This will recommend who can work when based on the volume and labour forecasts. It also takes into account colleague availability and skills


*The time taken to complete tasks in your store has already been configured in the system through rigorous testing.



Why has it been introduced?

Auto-scheduler will ensure that we have the right people, in the right place, at the right time in order to provide exceptional customer service. It also reduces management time spent compiling rotas and allows us to innovate in technology in line with our competitors. It also upholds our value of Equality, by ensuring breaks are applied consistently to all colleagues.

It allows your manager to more accurately monitor and track your overtime and legal requirements, such as the minimum time between shifts. Managers will receive alerts that are automatically generated in Kronos to ensure these are complied with.



What does scheduling mean for you?

Your schedule and shift patterns may change each week depending on the volume and labour forecasts in your store.

It's important to know that you will never be scheduled to work a shift during a time you have said you are unavailable to work.

How does scheduling work?

What happens if someone calls in sick?

If someone calls in sick, your manager will mark the colleague as sick in Kronos. This will create overtime, which is called an 'open shift' in Kronos. Your manager can then identify the most appropriate colleague to cover the shift based on skills and availability. You can also request to work the 'open shift' (see page 17 for more information).

What happens if you have training or a meeting?

Ensure you tell your manager about your training or meeting as soon as possible. They will then be able to change your availability in advance of the schedule being created.

If you tell your manager with over 4 weeks until your training or meeting, appropriate cover will automatically be generated in the schedule. Otherwise this will create an open shift that either your manager can assign cover for or you can request to cover. More information on this can be found on page 17.

What happens with your holidays?

You should ensure you book your holidays 4 weeks in advance through Kronos so that the schedule is aware of your availability and does not schedule you in for any shifts.

Please refer to the FAQs on Colleagues Connect to see how your holiday will be calculated.

If you have a single shift that you cannot work, you can request to shift swap with another colleague on a day that you can work. More information on this can be found on page 21.

What can you now do?

You can view your schedule on your computer, the clock and the mobile app.

You can request overtime and swap shifts with another colleague.

All the information on these can be found throughout this guide and more details and video guides on the Kronos page of Colleagues Connect.

What should you do if you have any questions?

If you have any questions, please direct these at your manager in the first instance. More information on other ways in which you can give feedback, including the colleague website, emails and colleague councils can be found on page 26.

How to view your schedule

This section includes information on:

- Your schedule
- Where and how to view your schedule

About your schedule

Your schedule will be posted after 12pm each Friday for the next schedule period which is 4 weeks ahead.

If any amends to the schedule are made after this date, your manager will repost it so that you can view your most up to date schedule.

Your manager may also print the schedule and pin it up in store, however this will be done on a week by week basis.

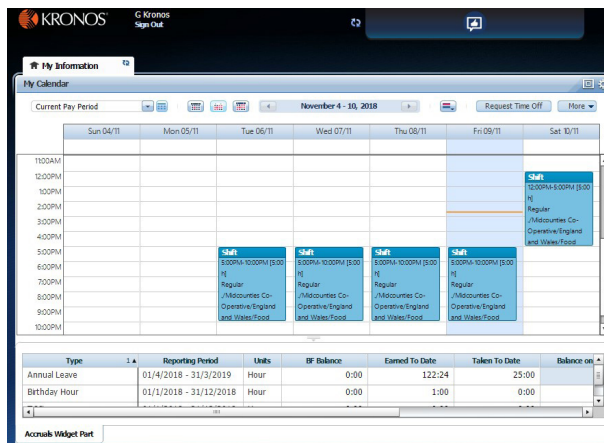
Where can you view your schedule?

You can view your schedule on:

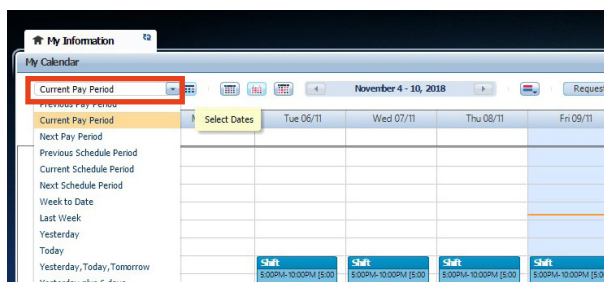
- The portal
- The app
- The clock

Using the portal to view your schedule

- 1 Once you are logged in to the portal on your computer, your calendar view will automatically appear on the screen. Your shifts will appear in blue, and will include the times and duration of your shifts.



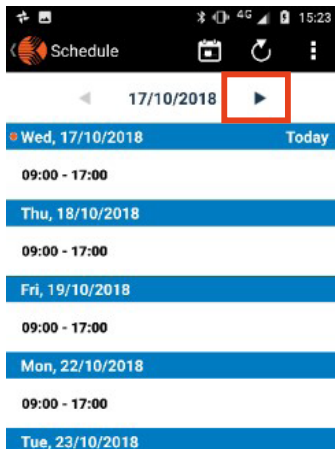
- 2 You can change the view to a specific date, pay period or schedule. Either click on the drop down arrow or select specific dates using the calendar button (both highlighted below)



How to view your schedule

App

- 1 If you haven't already, search in your App store for Kronos mobile and enter the server address <https://midcounties.kronos.net/wfc> when prompted
- 2 Enter your User Name and Password. This is the same as your normal Kronos login. If you are unsure of your username, speak to your manager
- 3 Click Schedule
- 4 From here, you can see the dates and times you are scheduled to work. Click across to see the scheduling for the next week



Clock

- 1 Go to the clock in your store
- 2 Click view schedule
- 3 Scan your finger on the biometric reader. You will now be able to see the times you are scheduled to work. You can click the arrow down to see the next week's schedule
- 4 Press the Home button on the bottom right of the clock to click off your schedule

How to use your KMail

This section includes information on:

- What KMail is
- How to send messages
- How to view your messages

What is your KMail?

KMail is a messaging system within Kronos. Any approved or refused request will appear in your inbox and it is also possible to send and receive other messages.

How you can view your messages

You can view your KMail on:

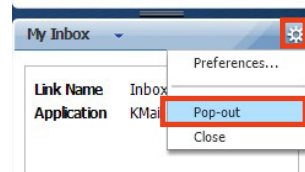
- The portal
- The clock

How to use your KMail

Using the portal to view your messages

- 1 Once you are logged in to Kronos, locate your inbox on the right

- 2 Click on the settings icon in the top right of your Inbox and select 'Pop-out'



- 3 Click on the message you want to view and click open or double click the message

MESSAGING INBOX

Last Refreshed: 3:05 PM

New Open Reply Delete Refresh		
As of Date: <input type="text"/>		
From	Subject	Received
Kronos, J	Your request starting on 05/12/2018 has been Approved	09/11/2018 3:02PM (GMT) Greenwich Mean Time
Kronos, J	Your request starting on 30/11/2018 has been Approved	02/8/2018 2:40PM (GMT) Greenwich Mean Time

- 4 Once you have viewed your message, you can close it, reply to it, delete it or print it

Using the clock to view your messages

- 1 Click on messages
- 2 Scan your finger ID
- 3 Click on each individual message to view
- 4 Once you have finished, press the home button on the bottom right of the clock

How you can send messages

You can send messages on:

- The portal

Using the portal to send messages

- 1 Access your inbox as shown on page 12
- 2 Click 'new'

MESSAGING INBOX

Last Refreshed: 3:05 PM

<div> <div>New</div> <div>Open</div> <div>Reply</div> <div>Delete</div> <div>Refresh</div> </div>		
As of Date: <input type="text"/>		
From	Subject	Received
Kronos, J	Your request starting on 05/12/2018 has been Approved	09/11/2018 3:02PM (GMT) Greenwich Mean Time
Kronos, J	Your request starting on 30/11/2018 has been Approved	02/8/2018 2:40PM (GMT) Greenwich Mean Time

- 3 In the 'To' section type in the person's surname followed by an asterisk and click 'Check name' - In this example the surname is Kronos

Address Book

Check Name

To:

- 4 If there is more than one colleague with the same surname, it will ask you to select the correct colleague. Click on the correct colleague so it becomes highlighted and press ok - as shown in the image to the right
- 5 Type in your relevant subject and message and click 'Send'

Name

Available

Kronos, A

Kronos, B

Kronos, C

Kronos, D

Kronos, E

Kronos, F

Kronos, G

Kronos, H

How you can use the clock

This section includes information on:

- What features are available on the clock
- How to use each of these methods

What features are available?

- Punching in/out
- Viewing your current and future schedules
- Viewing your timecard
- Viewing your accrual balances
- Requesting time off
- Viewing your KMail (messages)

Punching in/out

This is how your time worked is calculated. You should ensure you do this at the start and end of each shift using your Finger ID.

If you have problems clocking in using your Finger ID ask your manager to re-enroll you with a different finger. If you still have problems, raise an incident on Service Now (<https://midcountiescoop.service-now.com>)

Some things can affect the working of the clock, such as poor cleaning. If you have any issues with your clock that you can't resolve, raise an incident via Service Now.

Viewing your current and future schedules

To see what hours you are scheduled to work, click view schedule on the clock and scan your registered finger. From here you can see the times you are scheduled to work for both your current and future schedules. Press the Home button on the bottom right to exit.

Viewing your timecard

Click view timecard on the clock and scan your registered finger. From here you can check your timecard for: the previous pay period, current pay period, next pay period, today, yesterday, week to date or the last week. Press the Home button on the bottom right to exit.

Viewing your accrual balances

Click view accruals on the clock and scan your registered finger. Click on the date you wish to view. From here you can see: your birthday hour, your remaining annual leave, any toil balances and how much annual leave you have earned on that particular date. Press the Home button on the bottom right to exit.

How you can use the clock

Viewing/making requests

From new requests you can both book and cancel time off.

To book time off

- 1** Click new requests on the clock
- 2** Scan your registered finger
- 3** Click leave request non-scheduling and click submit
- 4** Click the start date of the time you wish to book off
- 5** Click the end date
- 6** Click the reason for your time off, either: annual leave, birthday hour, doctor/dentist appointment, hospital appointment or toil
- 7** Review the request and click continue or click back to edit
- 8** Click on the duration of your time off: full day, half day or the number of hours
- 9** Again, review the request and click continue or click back to edit
- 10** Click submit
- 11** Press the Home button on the bottom right to exit.

To cancel a request

- 1** Click new requests on the clock
- 2** Scan your registered finger
- 3** Click leave request non-scheduling
- 4** Click the date of the request you want to cancel
- 5** The request will then appear, click on the request to cancel it
- 6** Press the Home button on the bottom right to exit.

Viewing your KMail

Click messages on the clock and scan your registered finger. For more information on KMail including how else to view your messages, how to reply and send new messages go to page 11. Press the Home button on the bottom right to exit.

How you can request overtime

This section includes information on:

- What overtime is on Kronos
- Where you can request overtime
- What the process is

What is overtime on Kronos?

On Kronos, any overtime or additional shifts are called 'Open shifts'. An open shift is a shift that is scheduled for a job, but has no colleague assigned to it. Your manager can assign open shifts to colleagues through Kronos, which will identify the best colleague to cover the shift based on colleague skills and availability.

You can also request to work open shifts.

What is the process?



How can you request an open shift?

You can request an open shift in a number on:

- The portal

How you can request overtime

Using the portal to request an open shift (overtime)

You can request to work either the whole of a shift or a partial shift (minimum of 3 hours). Please note that if you have said you are unavailable to work at a time when an open shift is available, you will not be able to request an open shift yourself. However you can ask your manager to change your availability as a one-off to allow you to work the open shift.

Requesting a whole open shift

- 1 Your Calendar view will automatically appear once you have logged in to the portal. If there are open shifts these will appear in a red bar underneath the relevant day. The number in brackets corresponds to the number of open shifts available on that day.
- 2 If you hover over the right hand side of the open shift bar, it will show a listing of the shift times available for that day.

Mon 19/11 Tue 20/11 Wed 21/11 Thu 22/11 Fri 23/11 Sat 24/11

Open (2) Open (2) Open (2) Open (1) Open (1) Open (1)

Regular
6:00AM-12:00PM (1)
7:00AM-3:00PM (1)

Sara
SOPWA SOPWA (3:00 M)
Regular
Microseries Co: Openers/England

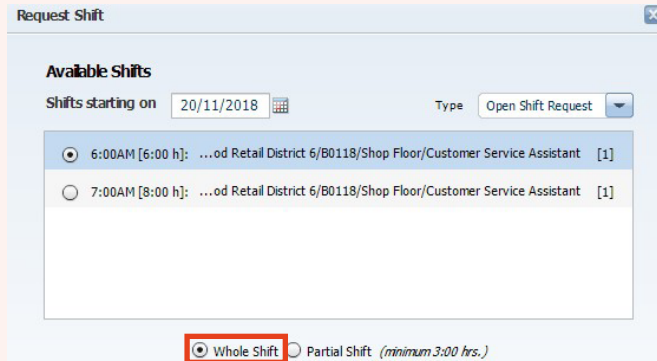
Shift
SOPWA SOPWA (3:00 M)
SOPWA SOPWA (3:00 M)
SOPWA SOPWA (3:00 M)
SOPWA SOPWA (3:00 M)

- 3** Either click on the arrow on the red bar of the open shift and click request shift Or you can click on the day of the shift, click more and click request shift

[illegible]

The screenshot shows a dropdown menu for 'Request Time Off'. The menu is open, displaying two options: 'Request Shift' and 'Request Shift Swap'. The 'Request Shift' option is highlighted with a red box.

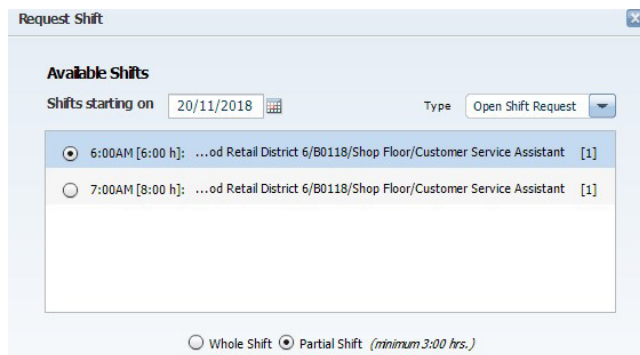
- 4 Select the shift that you would like to work and ensure the whole shift button is selected



- 5 Then press submit, this will then be sent to your manager for approval. If they approve the request, the shift will automatically appear in your schedule

Requesting a partial open shift

- 1 Follow steps 1-3 under 'Requesting a whole open shift'
- 2 Click on the shift you want to partially work and ensure the partial shift button is selected



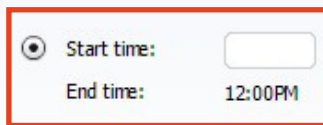
Continued on the next page

How you can request overtime

Requesting a partial open shift (continued)

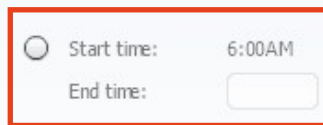
- 3** You can either choose to start later than the set shift, but finish when the shift ends or you can choose to start when the shifts starts and finish earlier.

Type in the time you want to start or end into the relevant box



☒ Start time:
End time: 12:00PM

Click here if you want to start the shift later, but finish at the end time. Type in the time you want to start



☐ Start time: 6:00AM
End time:

Click here if you want to start the shift on time, but finish earlier. Type in the time you want to end.

How you can swap shifts

This section includes information on:

- What a shift swap is
- What the process is
- How you can request a shift swap
- How you can approve/reject a shift swap

What is a shift swap?

There may be occasions when you may not be able to work a certain shift and you cannot or do not want to use your annual leave, you may therefore wish to swap shifts with another colleague.

Example: Colleague A may not be able to work their usual Monday shift so rather than take any annual leave, may request to swap shifts with Colleague B who has a shift on a Thursday. If Colleague B approves the request and so does the manager, then the shifts will have been exchanged and will change automatically in Kronos. If Colleague B does nothing or rejects the request or the manager refuses the request, the colleagues will work their previously scheduled shifts.

You must ensure you swap shifts with a shift that is the same length as yours otherwise your manager will not approve the request.

You may wish to agree the shift swap with a colleague in person first so that they are aware of your request. However you must ensure you also request it through Kronos, and that your colleague accepts the request in Kronos. If you don't you will still have to work your original shift.

How you can swap shifts

What is the process?

Request to swap a shift with another colleague



Other colleague accepts or rejects it



If they accept, the request goes to your manager for approval



You have now 'swapped shifts'

How can I request a shift swap?

You can request a shift swap on:

- The portal

Using the portal to request a shift swap

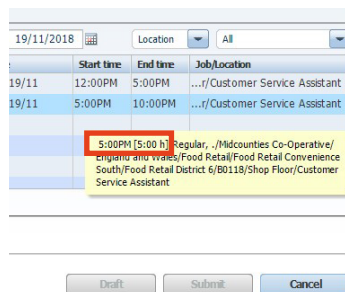
- 1 From your calendar view, click on the day of the shift that you want to swap. Click more and request shift swap
- 2 Ensure that the details of your shift that you want to swap are correct. The date, time and duration
- 3 Ensure the date you want to swap with is correct. Use the calendar icon to the right of the date to swap the date

The screenshot shows the 'Request Shift Swap' portal. At the top, there's a navigation bar with 'Request Time Off' and a 'More' dropdown menu. Below this, a calendar view shows 'Fri 23/11' with an 'Open (1)' shift. A red box highlights the 'More' dropdown menu, which contains 'Request Shift' and 'Request Shift Swap'. Below the calendar, there's a 'Request Shift Swap' form. The form has fields for 'Date' (20/11/2018), 'Time' (5:00PM - 10:00PM), 'Start Date' (20/11/2018), 'Start Time' (5:00PM), and 'Duration' (5:00 h). There's a 'Swap with' field with a date picker set to 18/11/2018.

- 4 You need to ensure the duration of the shift is the same as the one you are swapping. For example if your shift is 5 hours, you need to swap with a shift that is 5 hours.

If this is not possible, you will have to change the date of the shift you want to swap with (see step 3)

You will be able to see the start and end time of the shift, but to double check the duration, hover over the shift times and see the number in square brackets



	Start time	End time	Job/Location
19/11	12:00PM	5:00PM	...r/Customer Service Assistant
19/11	5:00PM	10:00PM	...r/Customer Service Assistant

5:00PM [5:00 h] Regular, ./Midcounties Co-Operative/Engineers and trades/Food Retail/Food Retail Convenience South/Food Retail District 6/80118/Shop Floor/Customer Service Assistant

Buttons: Draft, Submit, Cancel

- 5 Once you have checked the duration, click on the colleague that you want to swap with and click submit

- 6 If your colleague accepts the request, it will go to your manager for final approval. If they approve the request, the shift will automatically change in both your schedules.

However, if your manager or colleague refuse the request, you will both still be scheduled to work your original shifts.

How can I approve/refuse a shift swap?

If someone requests for you to shift swap with them, you can choose to approve or reject their request.

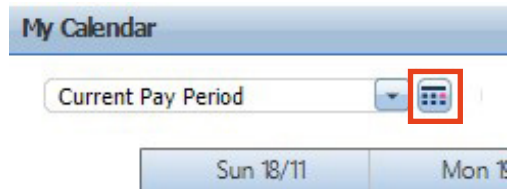
You can approve/reject a shift swap on:

- The portal

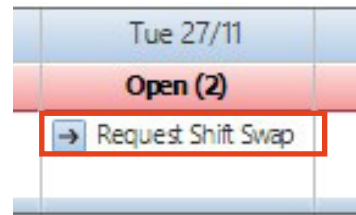
How you can swap shifts

Using the portal to approve/reject a shift swap

- 1** If your colleague who has requested to swap shifts has made you aware of the date you can automatically go to the relevant date using the calendar icon.



- 2** You will be able to see 'Request Shift Swap' under the date



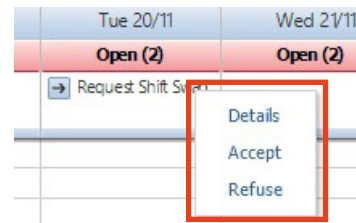
- 3** However, you should always keep on top of your KMail and keep an eye out for any messages from another colleague requesting to shift swap

- 4** Open your KMail and view the message (see page 11 on how to do this)

From	Subject
Kronos, G	Request Offered; Request Type: Request Shift Swap; Offered by: Kronos, G

- 5** You will be able to see the date of the requested swap and you can navigate to the relevant date, following step one

- 6** If you highlight over the arrow next to 'Request Shift Swap', you will see the options for Details, Accept and Refuse



- 7 If you click on details, you will see all the details of the request including the date, time and duration of both your original shift and the proposed shift swap. Click close once you have finished viewing

Shift Swap Request Details

→ Offered 12/11/2018-10:34:11AM

Kronos, G

Start Date	20/11/2018	Start Time	5:00PM
Duration	5:00 h		
Regular			

Swap with

Start Date	18/11/2018	Start Time	5:00PM
Duration	5:00 h		
Regular			

Status History

→ 12/11/2018 - 10:34:11AM

- 8 Again, click the arrow next to 'Request Shift Swap' and click either Accept or Refuse. This will open up a new window where you need to confirm your choice. There is also room for any comments
- 9 If you refuse a colleague's request, your shift will stay as originally planned. However, if you accept the request this will go to your manager for approval
- 10 You will get a message through KMail once your manager has approved or refused the shift swap. If the request has been approved, the shifts will automatically swap within your schedule

How can you give feedback?

What are the different ways you can give feedback?

- Manager
- Colleague Council
- Colleagues Connect
- Email
- KMail
- Social Media
- Speak in Confidence

Manager

If you have any comments or concerns, you should always try and talk to your manager in the first instance. However if your manager cannot help you with your query there are a number of other places for you to give your feedback.

Colleague Councils

You can give feedback or ask a question through your colleague council rep who will be able to raise this at the next meeting.

If you are unsure who your local rep is, go on the Food & Post Office Colleague Council page on Colleagues Connect, under the 'Working Here' section. Once you have clicked on Food & Post Office Reps, and found your local store, click on your rep's name to send them an email.

KMail

You can send feedback directly using KMail - see Page 11 for details.

Colleagues Connect

To access Colleagues Connect type either mid.coop/colleaguesconnect or colleaguesconnect.midcounties.coop into your browser.

You can access the website on your computer, tablet or phone at home or at work. On the website, you can give feedback in two different ways:

- 1** At the bottom of every page is a 'Is this Helpful' with a thumbs up/thumbs down. Once you have clicked on one of the thumbs, you can type your feedback and contact details so the team can respond to you. If your issue is specifically about the rollout of auto-scheduler, ensure you put the feedback at the bottom of the Kronos page so that it gets forwarded to the appropriate team.
- 2** You can also give feedback or ask a question on Phil's blog. To do this scroll to the bottom of one of the blogs (you'll find these under the Team Talk section) and sign in. To sign in you will need your username and password (the same as for Kronos). You can then type your comment and click submit.

Email

If you have any questions on auto-scheduler once it has been rolled out to your store, you can email the Workforce Management Team; workforcemanagement@midcounties.coop.

However, please be aware that for certain queries you may be asked to raise an incident via Service Now.

Social Media

There are two Facebook groups for Food Retail Colleagues where you can give feedback or put any comments.

- The Core
- Customer First Food Retail Group

Remember to stick to our Social Media policy when using any form of Social Media to talk about work.

SpeakinConfidence

If you don't feel comfortable talking to your manager and want to talk to someone at work anonymously, you can use SpeakinConfidence. Details on how to access this can be found on Colleagues Connect under Your Benefits.

