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KRONOS

Workforce Management v8.0

User Guide

Labour Scheduling - Food Retail

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The Stages of Scheduling

What is Scheduling?

The Workforce Management System will allow us to ensure we have the right people, in the right place, at the right time.

The system will schedule colleagues to work in store based on a number of criteria:

- Colleague Contracted Hours
- Colleague Availability & Skills
- Specific Store Data, including Sales, Footfall, Special Events, Opening Hours etc.

This allows us to optimise colleague coverage at store in order to provide exceptional customer service.

The Stages of Scheduling

What is a Volume Forecast?

A volume forecast is a process that will be run on a Sunday night, when the volume runs it is forecasting the amount of sales at your store. It's **automated process** and is anticipating will be achieved based on historical data. You can influence the volume forecast if you are aware of anything that will effect sales, e.g. a bank holiday, or community/local event.

Manager Input – alert the Workforce Team to Special/Local Events via the local events portal
Review Volume Forecast for anomalies

What is a Labour Forecast?

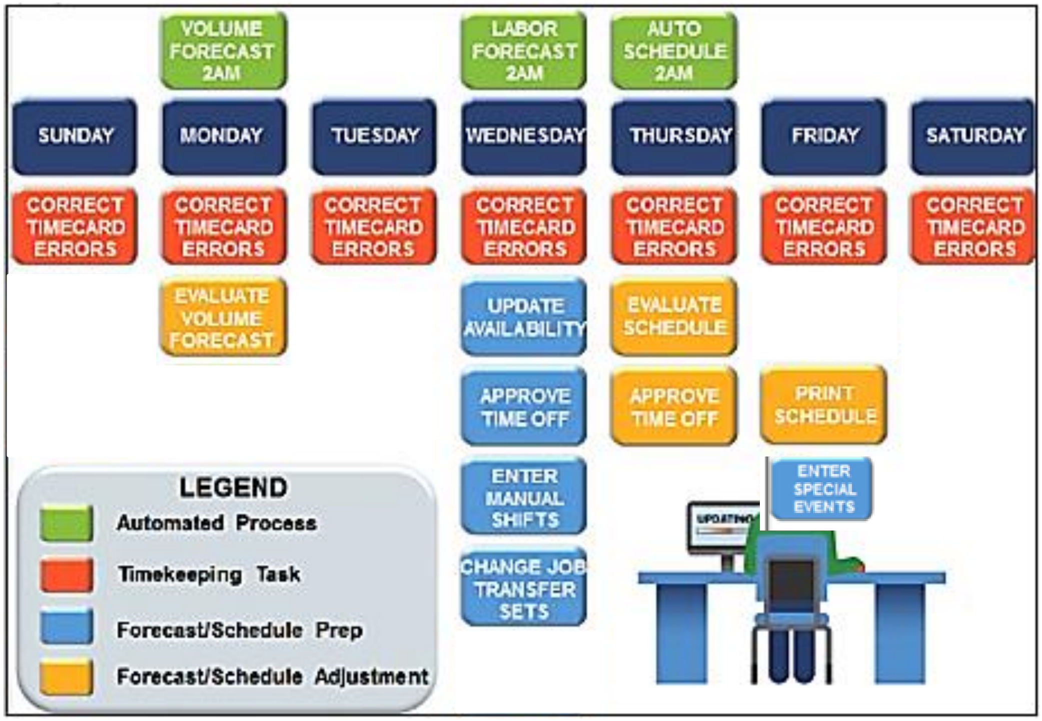
A Labour Forecast is an **automated process** which will run on a Tuesday night, the system will forecast how many hours are required based on the amount of sales it has estimated, which includes special events it knows about. The time taken to complete tasks at site has already be configured in the system and is used to calculate the Labour Forecast.

What is the Auto Scheduler?

This will be an automated process that will run on a Wednesday night. The Volume Forecast has predicted how much will be sold and when, the Labour Forecast has predicted how many hours are needed. Now the auto-scheduler will recommend who could work when.

Manager Input – Ensure accurate information about colleague availability, colleague skills. Authorise Time-Off Requests. Evaluate and Adjust Schedules.

A Week in the life of a Manager



This diagram highlights the stages of the scheduling and timekeeping process and the tasks you will be required to complete.

Daily = Manage Timecard Exceptions
As you become aware = Alert Workforce Team of Special Events & Hours of Operations Changes
As you become aware = Authorise Holiday Requests, Enter Time-Off Requests (Community Hours, Birthday Hour)
Monday & Tuesday = Review the Volume Forecast and alert Workforce Team to adjustments
Thursday = Review the generated schedule & make any manual amends
Friday after 12 pm = Print schedule

Ad-Hoc Tasks = Amend colleagues' Skills Set, amend colleagues' Contract Schedule & Pay Rule, amend colleague's availability
Re-post Schedule (each time you make an amend to a posted schedule)

Preparing for the

Schedule Generation

Preparing for Schedule Generation

There are a number of tasks you need to complete before the schedule is generated on a Wednesday Night.

Completion By: COB Wednesday minus 4 Weeks from schedule being worked

- Managing Self-Service Time-Off Requests – by end of business Wednesday
- Entering Approved Time-Off – by end of business Wednesday
- Adding Training & Meetings to the schedule – by end of business Wednesday

Completion By: Minus 5 Weeks from schedule being worked

Inform Workforce Management Team of Special Events using the local events portal – by end of -5 week

The Schedules Widget

The Schedules widget is the primary tool for creating and managing schedules.

Quick Actions

Click to access icons that allow you to perform the most common scheduling actions quickly and easily.

View/Visibility Options

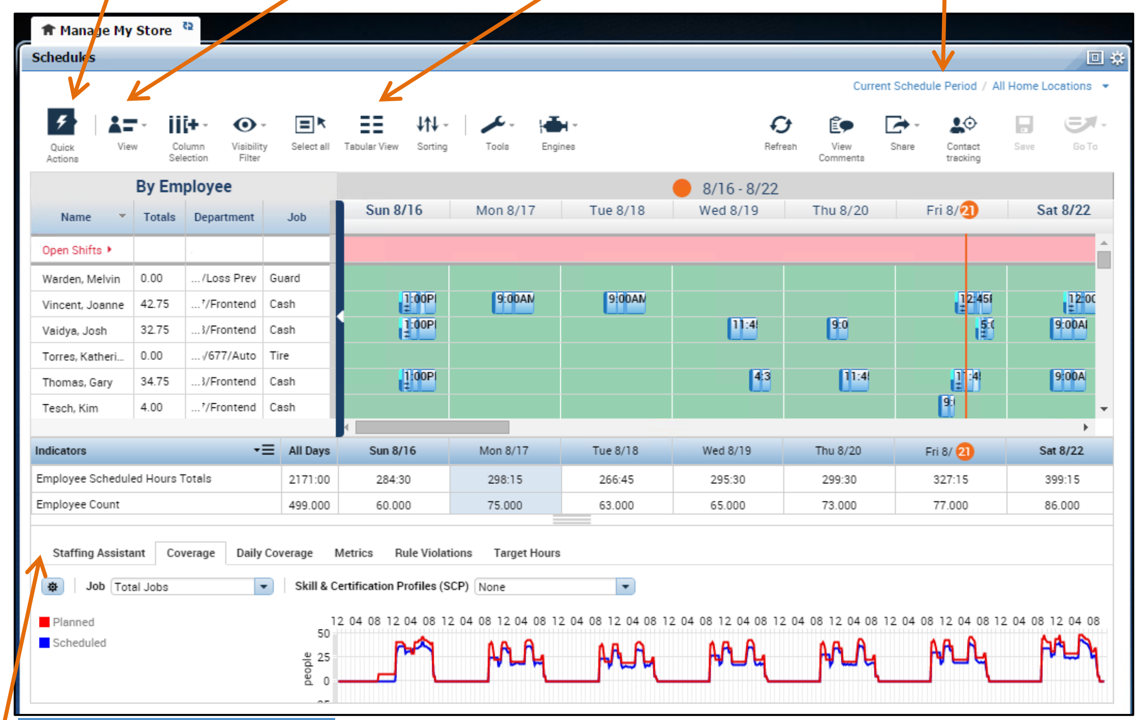
Use View to select how you want to view the schedule: by employee, schedule group, etc.

Tabular/Gantt View

Click to toggle between Tabular and Gantt views of the schedule

Context Selector

Set the time period and location that you want to work with.



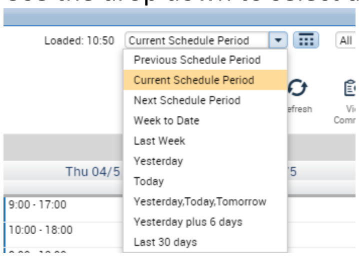
Tabs

The Coverage & Metrics Tab help you evaluate data and the Staffing Assistant helps you to fill open shifts

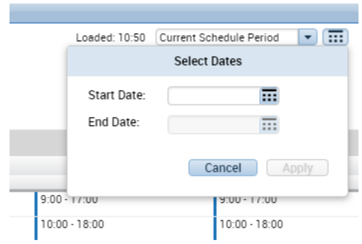
The Context Selector

You will use the context selector to navigate to different periods and weeks.

Use the drop down to select a period



Or click the calendar icon to enter specific dates



The Save button

Greyed Out = You cannot save or there are no changes to be saved

Orange = You have unsaved changes

Managing Time Off Requests

You must enter all known time-off before the auto-scheduler runs, this will ensure that appropriate cover is scheduled for your store, and open shifts are created where needed.

The types of Time-Off I can enter are:………………………………………………………………………………………

View Accruals Balance

Before authorising time-off you should check your colleague's accrual balance. An accrual is a number of hours that increases as earned. We have accrual balances for holiday and TOIL. You can view how much holiday and TOIL a colleague has taken and how much they have left.

You can view a balance in the Schedules Screen

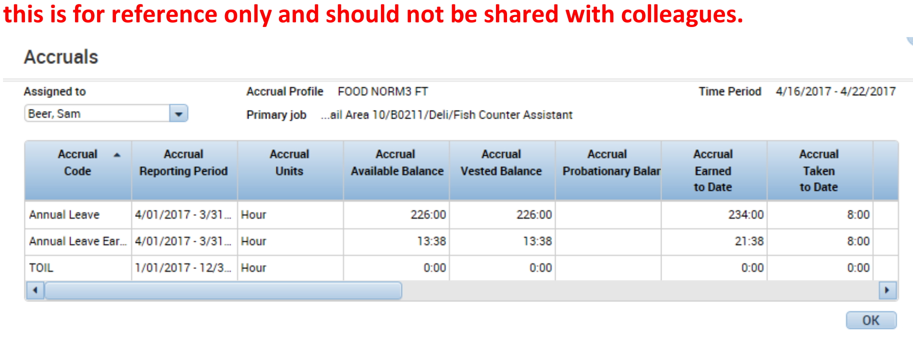
1. In the **Schedule Widget** > **Right Click** on a Colleague **Name**
2. Select **More Actions**
3. Select **View Accruals**

This will open the Accruals Window, where you will see Available Balance and Taken to Date

You can also view a balance in the **Request Manager.**

1. In the Request Widget (accessed from the related panes, or alerts)
2. Highlight a colleague request
3. In the lower half of the screen the accruals balance will display.

Please Note: Colleagues will see their Holiday and TOIL balance. As a manager you will see a Sickness balance this is for reference only and should not be shared with colleagues.



Accruals

Assigned to: Beer, Sam
Accrual Profile: FOOD NORM3 FT
Primary job: ...ail Area 10/B0211/Deli/Fish Counter Assistant
Time Period: 4/16/2017 - 4/22/2017

Accrual Code	Accrual Reporting Period	Accrual Units	Accrual Available Balance	Accrual Vested Balance	Accrual Probationary Balar	Accrual Earned to Date	Accrual Taken to Date
Annual Leave	4/01/2017 - 3/31...	Hour	226:00	226:00		234:00	8:00
Annual Leave Ear...	4/01/2017 - 3/31...	Hour	13:38	13:38		21:38	8:00
TOIL	1/01/2017 - 12/3...	Hour	0:00	0:00		0:00	0:00

OK

There are two main ways time-off requests can be completed

1) **Colleague Self-Service** – This request is completed within the system, on the clock or on the app by the colleague and will come through to you on a request notification
2) **Manual entry** – Added to a future schedule by yourself on behalf of the colleague

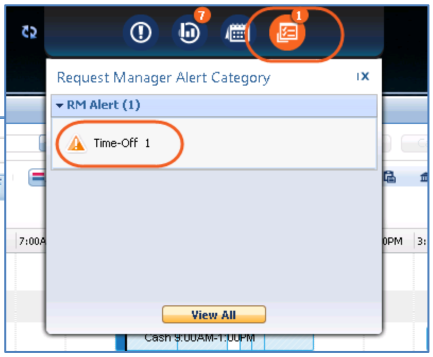
Please Note: All requests should be encouraged to be sent through Colleague Self-Service.

Managing a Time-Off Request from Self-Service

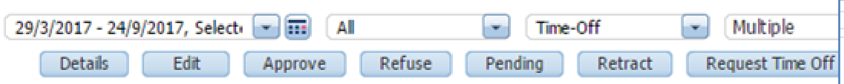
Your colleagues must request time-off via the Clock or the Kronos App. When they do this it will come through for your authorisation. An alert will appear as seen below.

Approving/Rejecting Self-Service Time-off Requests

You will need to action all self-service time-off requests. Once authorised the time-off will be added to any future schedules.



1. Click on the **Request Alert**



2. From the drop-down list, you will see how many requests you have to action > Click on **Time-Off**

Top Tip: To view the schedules and requests, so you can check whether you have other colleagues on holiday, drag the Requests widget over the Genies widget so you have a split screen.

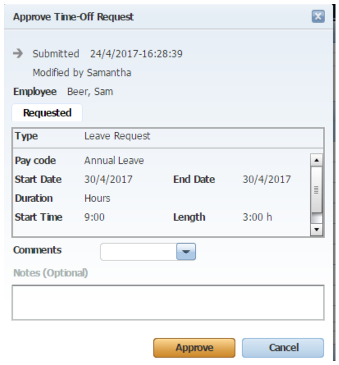
This will open the full Request Window, where requests will be listed.

3. Click on the line to **highlight** the colleague request.

View the available accrual balance in the bottom section of the screen.

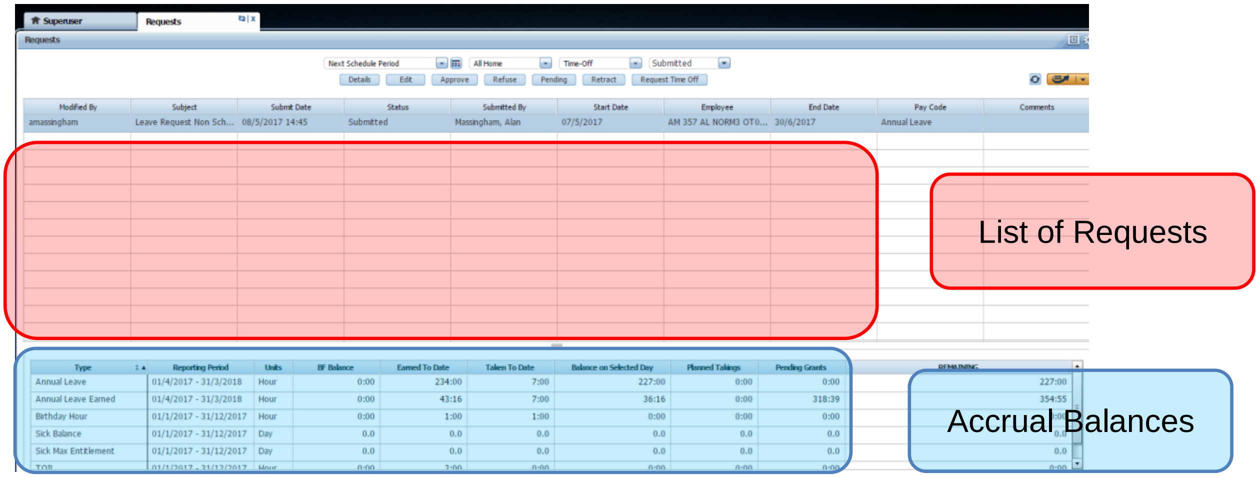
4. **Review** the full details of the request
5. Select **Approve** or **Refuse**

The relevant window will open



6. **Add Comments** if Refusing
7. Click **Approve/Refuse**

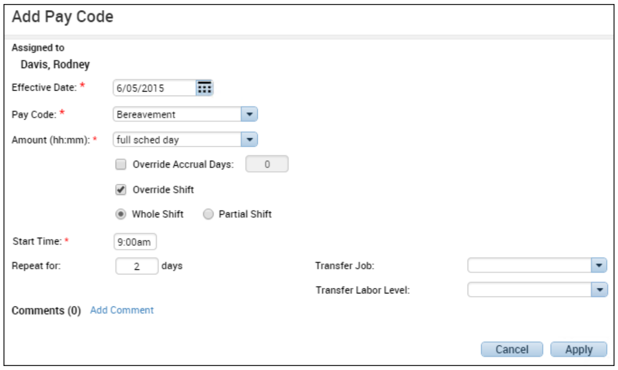
Your colleagues will be alerted when you have actioned their request, via their Kronos Inbox



Manually Entering a Pay-Code (Time-Off) into a Schedule

You will need to add a pay code to the schedule to record time-off. For example holiday, appointments, birthday hour, TOIL. PLEASE NOTE: This can also be actioned once the schedule has been generated; however this should not be a regular occurrence.

For further guidance on which Paycode to use, please refer to the Policies Guidance on the Kronos Intranet Pages



Please Note: You should enter time-off 4 weeks ahead of the schedule, or on the Wednesday/Thursday when reviewing the schedule before it is posted

1. In the **Schedules Widget** > Navigate to view the correct week > **Right click** on the relevant shift

2. Select **Add Pay Code**.

The Add Pay Code Window will open

3. Confirm that the correct **Effective Date** appears > Amend as needed

4. From the **Pay Code** drop-down list, select the applicable pay code.

Please note: you should not add sick to a future schedule.

5. In the **Amount** field, select **Full Scheduled Day** or **Half Scheduled Day** or **over type with an exact amount** e.g. 3:00

6. Leave Override Shift as ticked

7. Select either **Whole Shift** or **Partial Shift**

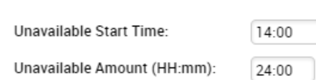
8. In **Unavailable Amount: Enter 0**

9. In the **Start Time** field, enter start time for the pay code. E.g. when the colleague is going to be off from

10. In the **Repeat for** field, enter the number of consecutive days to schedule this time-off.

Optional – Your can add comment to explain the reason for time-off

If you are adding Annual Leave you must amend the Unavaliable Amount (HH:mm) to 0.00



11. Click **Apply** and then click **Save**.

Please Note: As you have recorded this time-off before the schedule is generated the system will look to cover the shift with an appropriate colleague where necessary, to ensure coverage at store.

For Community Hours: please use the paycode Authorised Absence

Manually Entering TOIL into a Schedule

You can authorise colleagues to use TOIL and manually add this time-off to the schedule.

You will first need to check they have TOIL to use by viewing their Accrual Balance page 9.

1. Locate the appropriate date by navigating to the correct week
2. Right Click on the shift > Select Add a Pay Code
3. Confirm the effective date
4. From the Pay code list select **TOIL**

IMPORTANT NOTE: You must use TOIL Paycode when using TOIL, and Add to TOIL Balance when earning TOIL

5. In the **Amount field** enter the **number of hours**, or select full scheduled day.
6. Leave Override shift and create open shift ticked
7. Enter a **Start Time**
8. Click **Apply** and **Save**

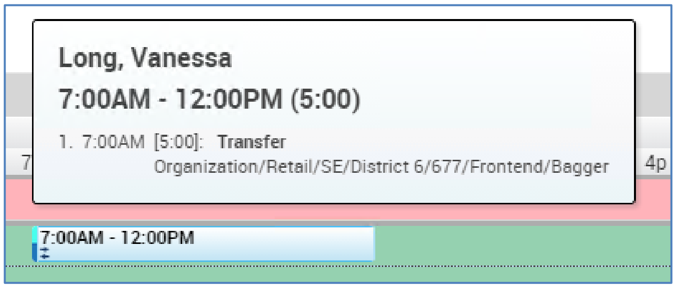
Scheduling a Transfer to Another Store

1. From the **Schedules Widget**
2. Locate your colleague and the **date and shift** which you want to transfer

If it is a new shift > Right click and select Add Shift

If it is a change to an existing shift > Right click and say Edit

This will open the Shift Window.



4. Enter/Amend a **Start** and **End Time**
5. In the Job Transfer Field use the drop-down list (this will display recently used locations),
6. Select **Search** > Expand the organisational map until you can select the correct job
7. Click **Apply**.
8. Click **Save**.

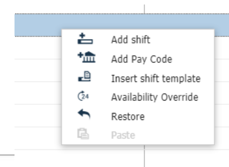
Creating Shifts for Training & Meetings

You will need to schedule any known training events or meetings. This will ensure that the Auto-Scheduler covers this when creating the shifts at site.

ADD A NEW SHIFT

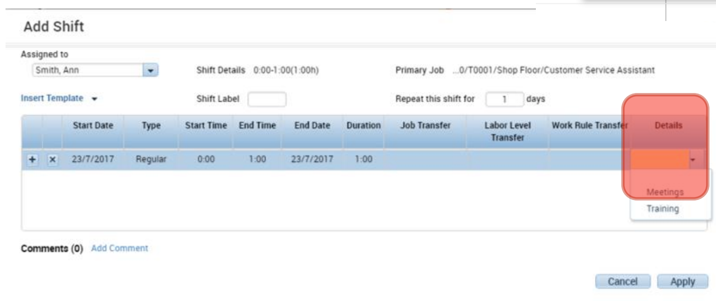
1.In the Schedules Widget > Right-click the **line of the colleague and correct date**

2. Select (**More Actions**) **Add Shift**.



The Add Shift window will open

a. In the **Start Date** field, click the **calendar** and select the date for which you want to add training/meeting



b. In the **Start Time** field, enter the **time** at which the shift will start.

c. In the **End Time** field, enter the **time** at which the will end.

d. In the **details** drop down, select **training/meeting**

e. Click **Add Comment** and add a **manager note**

3.Click **Apply**.

4.Click **Save**.

EDIT AN EXISTING SHIFT

1. Right Click on the Shift you wish to edit
2. Click **Edit**
3. Select **Meeting/Training** from the drop down **Details**
4. Click **Save**

Please Note : When you add a transfer or training/meeting in advance, the scheduler will fill the vacant shift when required at your site to ensure you have cover at site.

Managing Special Events

The system can adjust the number of colleagues scheduled to work on your stores, if it is aware of any special events happening at your store.

A special event might be a:

- member event
- local fete, fair or event that bring more customers to your store

The Workforce Management System allows us to schedule more colleagues when needed so you have the right people in the right places.

PRE-EVENT Please ensure that all Special Events (that boost trade) are logged on the Local Events Portal. These must be posted at least 6 weeks before the schedule is being worked.

POST EVENT - We also need to record events that have a negative impact on trade, i.e. water main burst and road was closed. Please email: workforcemanagement@midcounties.coop

The Forecast Planner

The Forecast Planner Wizard is used before the Auto-Scheduler is run. It allows you to see and review the Volume Forecast, so that anomalies are corrected before the system predicts how many hours you will need at site.

Select Forecast Planner from the Related Items Pane

Stage 1

Monday/Tuesday

Ensure Forecast Location = Your site

Forecast Week = +4 week ahead Sun Start Date

- **Wizard Parameters**

Stage 2

Monday/Tuesday

Review Volume Forecast

Check for anomolies and adjustment due to special events

- **Volume Forecast** - *forecast sales/items/transactions*
- Important Note: The Kronos Volume Forecast will NOT be the same as your budget figures

Everything looks correct

NO = Email the Workforce Management Team by 11 am Tuesday

YES = No action

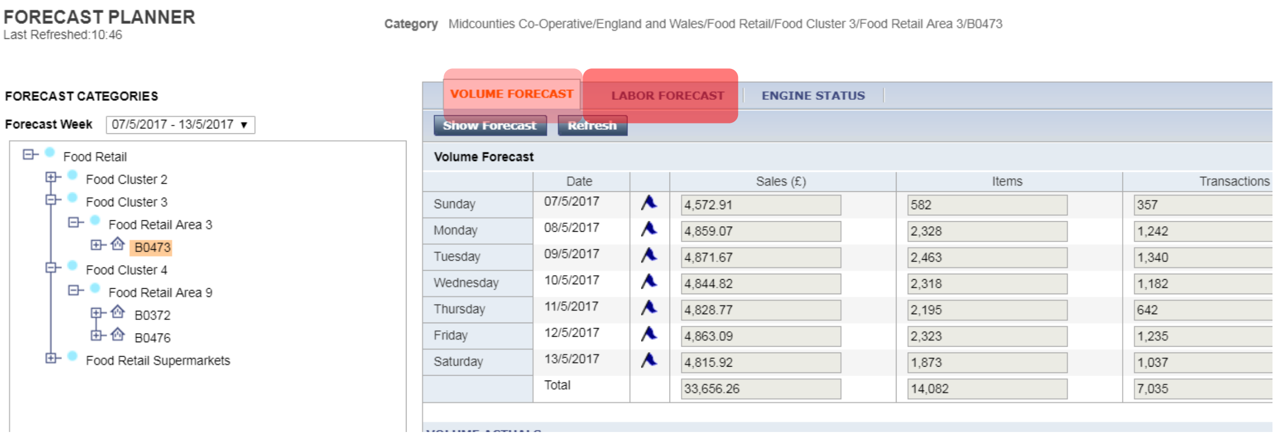
Stage 3

Wednesday

For information only

The Labour Foracst will be generated on a Tuesday night. you can view this for information only from Wednesday morning

- **Labour Forecast** - *how many hours you need*


FORECAST PLANNER
Last Refreshed:10:46
Category Midcounties Co-Operative/England and Wales/Food Retail/Food Cluster 3/Food Retail Area 3/B0473
FORECAST CATEGORIES
Forecast Week 07/5/2017 - 13/5/2017
Food Retail
Food Cluster 2
Food Cluster 3
Food Retail Area 3
B0473
Food Cluster 4
Food Retail Area 9
B0372
B0476
Food Retail Supermarkets
VOLUME FORECAST
LABOR FORECAST
ENGINE STATUS
Show Forecast
Refresh
Volume Forecast
Date
Sales (£)
Items
Transactions
Sunday 07/5/2017 4,572.91 582 357
Monday 08/5/2017 4,859.07 2,328 1,242
Tuesday 09/5/2017 4,871.67 2,463 1,340
Wednesday 10/5/2017 4,844.82 2,318 1,182
Thursday 11/5/2017 4,828.77 2,195 642
Friday 12/5/2017 4,863.09 2,323 1,235
Saturday 13/5/2017 4,815.92 1,873 1,037
Total 33,656.26 14,082 7,035

Evaluating and amending the schedule

The Auto-Scheduler

The Auto-scheduler will run on Wednesday Night, and will be available to view and amend on Thursday. Before the Workforce Management Team post the schedule for all your colleagues to see on a Friday.

You will need to check the schedule for:

- Labour Costs against budget
- Review Coverage
- Rule Violations

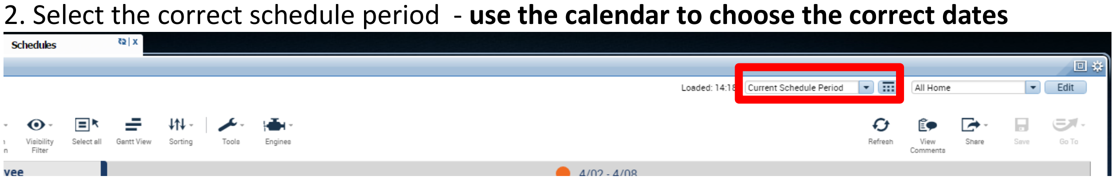
You can also make amends such as:

- Adding any authorised time-off requests (these should be minimum as holiday should be booked 4 weeks in advance)
- Adding any appointments, or ad-hoc leave
- Adding any training or meetings
- Unassigning or Assigning Shifts
- Swapping shifts between colleagues

How to view the Generated Schedule

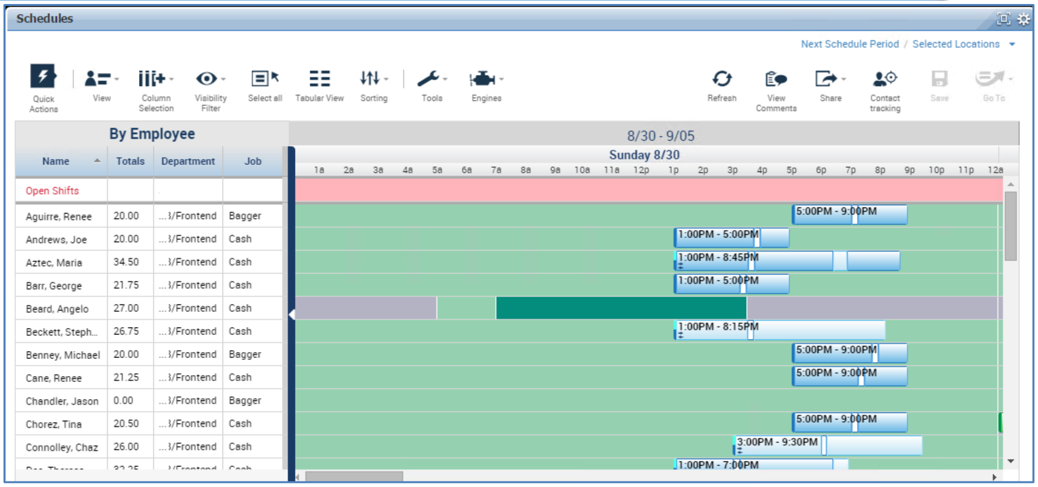
Important: Please ensure you are looking at the schedule for 4 weeks time, by selecting the correct dates 4 weeks ahead.

1. Click on the **Schedules** Widget
2. Select the correct schedule period - **use the calendar to choose the correct dates**



View
Toggle between **Gantt and Tabular View** by click on the buttons

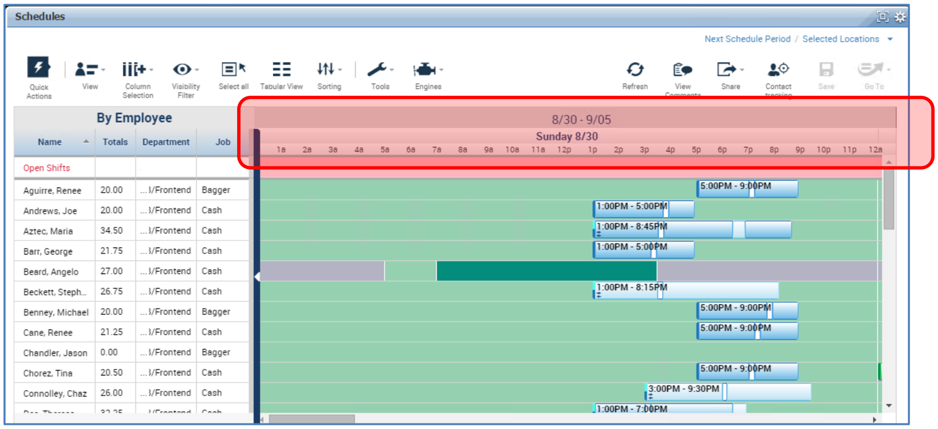
Sorting
Sort by name = Click on **Name** in the **Table** Header
Sort by Job (e.g. all colleagues in a certain department) = Click the **View** Button > Select **By Job**



View the assigned colleague

If you hover over any of the shifts you can see the full description of the job they have been scheduled to do.

View by Day



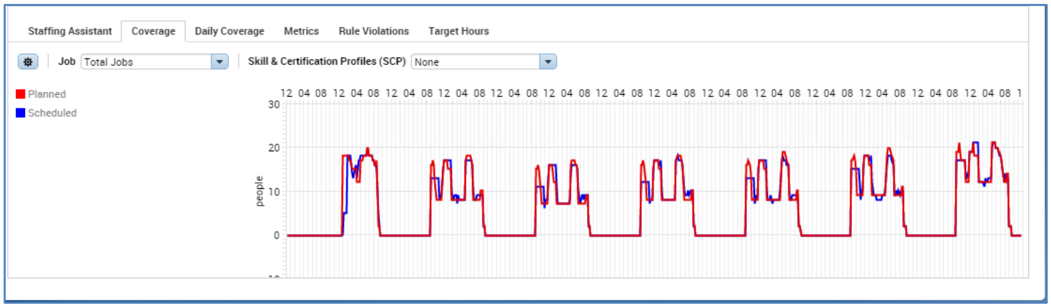
1. Click **a particular day** to see the full day view.
2. Click on the week range to navigate back to the week view. E.g. 30/9 – 06/10

Review Coverage Using the Coverage Tab

You will need to review that the correct amount of people are planned to work in each department. This is where you will identify over or under coverage.

Overcoverage occurs if too many colleagues want to work the same hours and the system is trying to meet contracted hours.

Undercoverage occurs if the system believe you need to have a shift staffed, but there is no-one skills and available to cover it. This will result in an open shift.



1. In the **Schedules Widget**. Use the **context selector** to set the time period for which you want to view coverage.
2. Click the **Coverage** tab. In the bottom left of the screen
3. From the **Job** drop-down list, select **Total Jobs** to see the total coverage for all selected jobs/locations you can also view by department by day.
4. Click **Apply**.

The graph displayed shows the labour forecast versus your generated schedule for a specific job (or for all jobs) in 15-minute intervals of a selected date. This will highlight over or under coverage so you can amend where necessary.

Evaluating the Labour Costs against budget

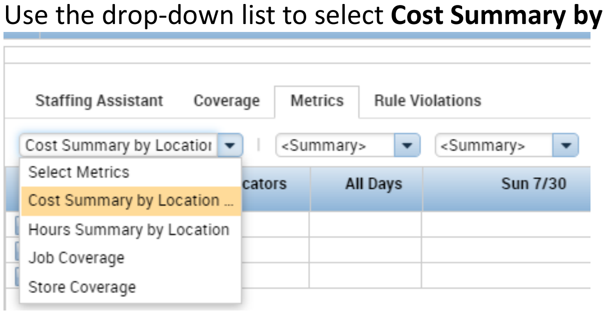
You will need to review the cost of the auto-schedule against the weekly labour budget for the store.

Please Note: Labour Costs do not include Tax and NI

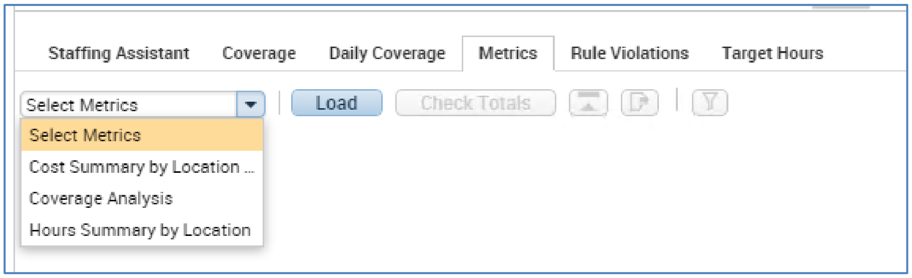
Viewing the Costs Summary

You can review the daily cost of the schedule for a location.

- In the **Schedule Widget**, use the context selector to select the time period and location.
- Select the **Metrics** tab. In the bottom left of the screen
- Use the drop-down list to select **Cost Summary by Location**



Review Coverage using the Coverage Metrics



1. In the **Schedules Widget**, use the context selector to select the **time period** for which you want to view metrics.

2. Select the **Metrics** tab. In the bottom left of the screen

Use the drop-down list to select **Coverage Analysis**.

(Optional) Use the job drop-down list to filter the jobs displayed.

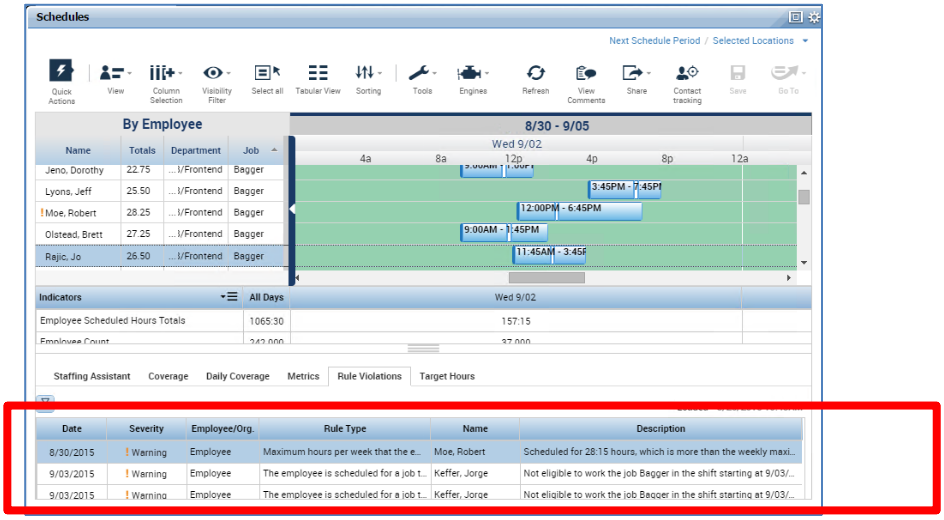
3. Click **Load**.

Expand rows individually, or use the Expand/Collapse icon to expand or collapse all rows.

Review Rule Violations

Within the system there have been various rules and warnings applied, these are to bring various points to the your attention. Some rules are for information only, and some cannot be broken. For more information please refer to the relevant Midcounties Policies and Procedures.

As you review your schedule, you need to check whether the schedule is violating any rules. If it is you must make adjustments and recheck the rules.



1. In the **Schedule Planner** widget
2. Click the **Rule Violations** tab. In the bottom left of the screen

   (Optional) Click the **filter** icon and then select the **rule violation filter(s)** for the rule violations that you want to view.
3. Click a **row** in the **Rule Violations** tab to action.

Tip:

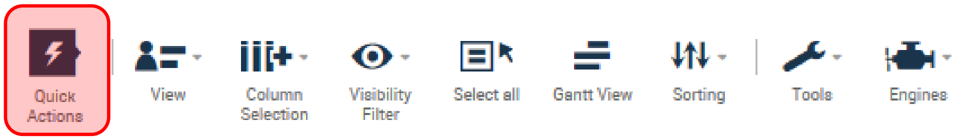
When you select a rule violation in the Rule Violations tab, the name of the colleague with that violation is highlighted in the Schedule Planner.

Rule Violation Levels:

Rule violation	Definition
Informational	A violation with a low severity level. You will still be able to save the schedule.
Warning	A violation with a high severity level. Example: a colleague has been scheduled for more than there contracted hours. You need to take action on this, or review to ensure you are compliant.
No Save	When amending the schedule, certain rules, if violated, will prevent the schedule from being saved and you from moving on. You **must** correct the error before saving. These No Save errors link to Working Time Directive Legislation, so must be adhered to Example: Minimum time between shifts of 11 hours.

Amending the Schedule Using Quick Actions

You can make amends to the generated schedule using the quick actions tool bar
You may need to add additional time-off Requests, swap colleagues, or even assign additional shifts to colleagues.
To open the Quick Actions Tool Bar:



1. Click on the Quick Action Icon, to view the complete toolbar

You can complete the following actions:

	Assign	Assign Open Shifts to colleagues (open shifts are displayed at the top of your schedule in pink)	a. Click Assign b. Click on the open shift c. Click on the colleague to assign to
	Unassign	Unassign shifts	a. Click Unassign b. Select the shift This shift is removed from the schedule and becomes an open shift
	Shift Transfer		a. Click Shift Transfer b. Select where to transfer to c. Click on the shift to transfer
	Insert Shift Template		a. Click Shift Template b. Select the template to use c. Click on the selected day and colleague to assign to
	Comment	Add comments to a shift	a. Click Comment b. Select the comment c. Select the shift or paycode
	Pay Code	Replace an assigned shift with a paycode (reason for time-off)	a. Click Pay Code b. Select the category of paycode c. Select the assigned shift This shift is removed from the schedule and becomes an open shift
	Copy/Paste	Copy a shift and paste to other colleagues	a. Click Copy/Paste b. Click on the shift to copy c. Click on the cell to copy to
	Delete	**Do not use delete, if you delete it will not create an open shift.**	
	Swap	Swap the job for the shift between colleagues	a. Click Swap b. Select the first item c. Select the second item

IMPORTANT: Every time you make a change to a published/posted schedule, You must repost so you colleagues see the latest version of the schedule

Managing Open Shifts

What is an open shift?

An open shift is a shift that has been created by the schedule but does not yet have anyone assigned to work it, this would be due to lack of availability or colleagues being scheduled as absent.

Open Shifts are created when:

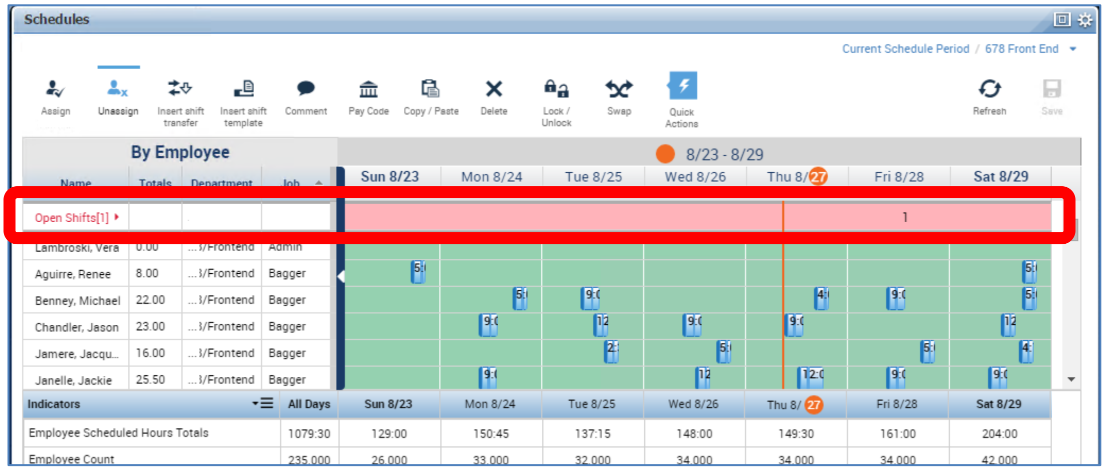
-The schedule generator does not have enough available colleagues to assign
-When a time-off pay code is entered – e.g. last minute time-off request
-When a shift is unassigned
-When training or meetings are entered

There are three ways to manage open shifts:

1) Using the Staffing Assistant
2) Employee Self Service Request to cover an open shift
3) Manually Assign a Shift (as covered in the quick actions page 23)

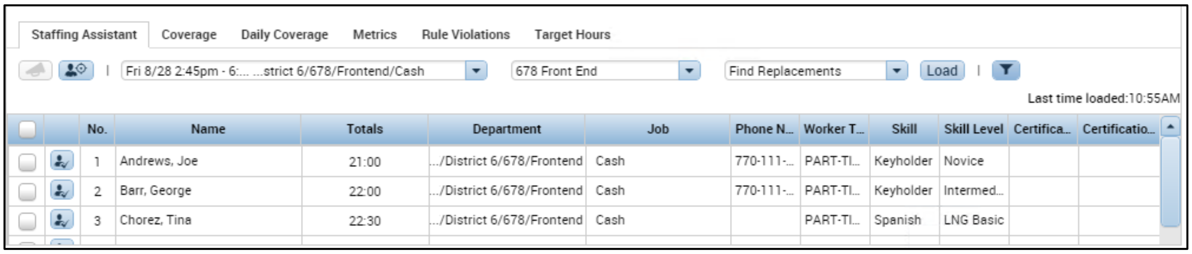
Viewing Open Shifts

All the open shifts for the schedule period are displayed in pink at the top of the schedules widget.



Using the Staffing Assistant

The Staffing Assistant can help you find the best colleague to fill an open shift, based on availability and skills.



1. In the **Schedules Widget**, use the context selector to select the **correct time period**. Open the lower accruals window by dragging the break line up.
2. Click the **Staffing Assistant** tab, in the bottom left.
3. Use the drop-down list to select the **open shift** that you want to fill.
4. If necessary, use the l**ocation** drop-down list to select a **new location**.
5. Amend criteria to **Most Available Colleague**
6. Click **Load**. Colleagues will be listed in the order of best fit.

You can also see the last shift the colleague is scheduled for, so you can manage their time-off

7. Assign the shift: to a specific colleague, by clicking the **Assign** icon next to the colleague's name. 

Employee Self Service – Open Shifts

Your colleagues can also request to work an open shift using Employee Self-Service. You would receive an alert showing the request to work. This will show in your alerts.

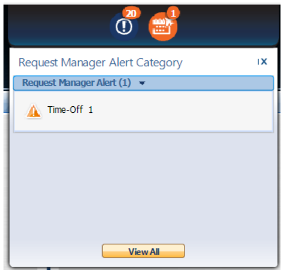
1.In the Request Alerts

2. Click on the Open Shift Request, this will open the requests widget

3.Select the line of the request

4 Select Approve or Refuse

5.Complete the window

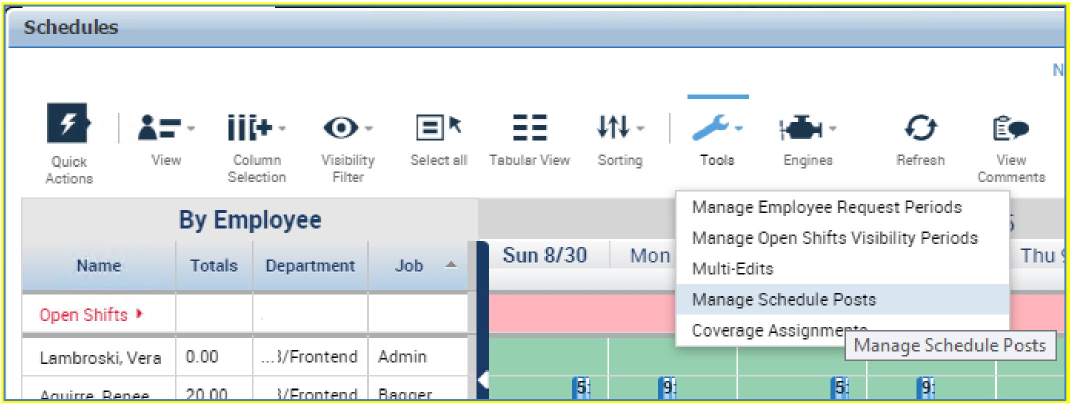


Posting a Schedule

IMPORTANT: Every time you make a change to a published/posted schedule. You must repost so you colleagues see the latest version of the schedule

Your schedule will be posted after 12 pm each Friday for the next schedule period (4 weeks ahead), after this the schedule is able to be seen by your colleagues on their App or on the Clock

If you make any amends to the schedule after this date you will need to repost so that all colleagues can view their most up to date future schedules.



1. In the **Schedules Widget**, use the **context selector** to select the **time period** and **location** for which you want to post a schedule.
3. Click the **Tools** icon and select **Manage Schedule Posts**.
4. Click **Post**. At the confirmation prompt click **Yes**.

(Optional) To view a history of posts, or unpost a schedule, click **Audit**.

5. Review the posted schedules, and click **Done**.

Printing a Schedule

You can print your schedule to pin up in store.

1. In the **Manage My Department** tab, in the **Related Items** pane, click **Reports**
2. On the **Select Reports** tab, expand the **Scheduler** category and select **Schedule by Labour Account - Weekly (Excel)** report.
3. From the **People** drop-down list, select the **All Home (to display entire store)**
4. In the **Time Period** field, select the **time period** of the schedule. Pick range of dates.
5. Use the **Output Format** drop-down list to select the **format** of the report. (Select Excel or PDF)
6. Click **Run Report**, (Top left) and then click **Refresh Status** until it displays **Complete**
7. Click **View Report**.

Employee Schedule - Weekly

Data Requested On: 8/26/2015 11:43:39 AM
Executed on: 8/26/2015 11:43AM GMT-04:00
Printed for: lgallo

Time Period: Next Schedule Period

Frontend - Location: Organization/Retail/SE/District 6/678/Frontend

Employee	Job	Sun 8/30/2015	Mon 8/31/2015	Tue 9/1/2015	Wed 9/2/2015	Thu 9/3/2015	Fri 9/4/2015	Sat 9/5/2015
Andrews, Joe	Cash	1:00P - 3:45P		5:00P - 7:30P	5:00P - 7:00P		2:45P - 4:45P	*5:00P - 6:00P Frontend/Bagger* x
	Cash	4:00P - 5:00P		7:45P - 9:00P	7:15P - 9:00P		5:00P - 6:45P	6:00P - 7:15P
	Cash							7:30P - 9:00P
Aztec, Maria	Cash	1:00P - 3:30P	9:00A - 11:15A	11:45A - 1:45P		12:15P - 2:15P		9:30A - 11:30A
	Cash	3:45P - 6:30P	11:30A - 1:30P	2:00P - 6:45P		2:30P - 7:00P		11:45A - 2:30P
	Cash	*6:30P - 7:00P Frontend/Bagger* x				*7:00P - 7:30P Frontend/Bagger* x		3:00P - 6:00P
	Cash	7:00P - 8:45P						
Barr, George	Cash	1:00P - 3:15P	1:00P - 3:00P		5:00P - 7:30P		5:00P - 7:00P	5:00P - 7:00P
	[illegible]	2:30P - 5:00P	3:15P - 6:45P		[illegible]		[illegible]	[illegible]

You can add this report to your favourites – Click **Save Favourite**

Employee Self-Service

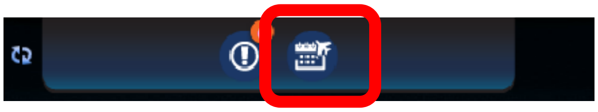
Using Employee Self-Service

The following alerts will come through Self Service

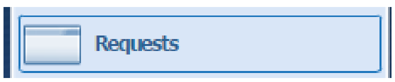
Request Type	Descriptions	Example
Time-Off Request	Colleagues will submit holiday requests through the Clock or App	Billy has requested to book the 20-25th November off work via the Clock
Scheduling Open Shift	Open Shift Requests allow colleagues to submit requests to work open shifts.	Joanne wants to request to work 3:00 P.M.–11:00 P.M. shift, which is now available as Betty has a hospital appointment
Manager Delegation Request	Requests to cover for another manager whilst you are acting in management responsibilities for their store.	Sally is away for an operation and you are covering the management of the neighbouring store.

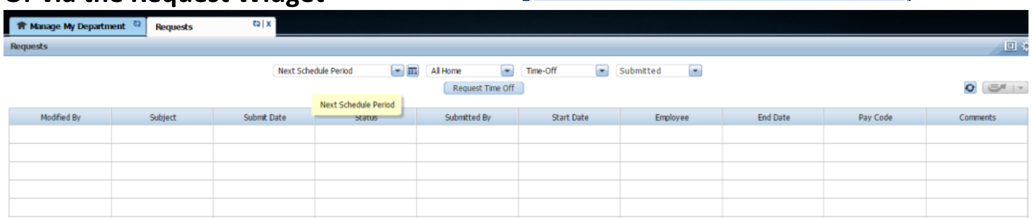
Viewing your Request Alerts

You can view your request alerts via your alerts pane.



Or via the Request Widget

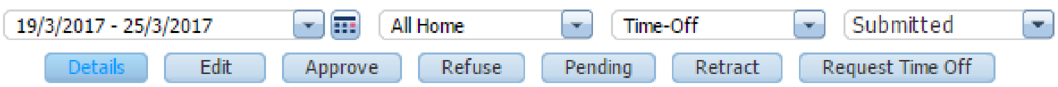




Approving or Rejecting a Request

1. **Click on the line** of the request
2. Select the Action – **Approve, Refuse, Pending, Retract**
3. Complete the box as applicable

You can shift and hold to select multiple lines to approve



The Kronos Clock

The Kronos Clock

Colleagues will be able to clock in on the terminal using fingerprint recognition

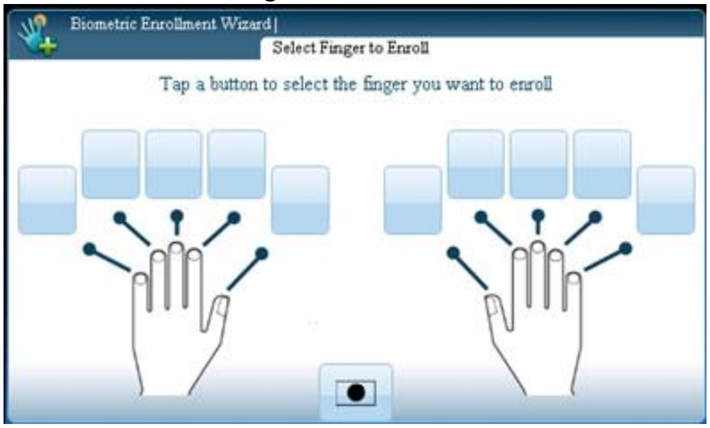
The Benefits:

- Provides safeguards that ensure privacy
- Your fingerprint is saved as a binary code and the image is not stored.
- Verifies you are who you are when you punch in and out
- Eliminates Colleague fraud

Please Note: New Colleagues will be added to Kronos Overnight, and will need enrolling on the clock

Enrolling Colleagues at the In Touch Terminal

1. Sign In using your Manager Log On
2. Click on **Enrol Employee**
3. Enter the **Employee Number** > Click **Enter**
   Select a Primary Finger and place on sensor (Do not slide or rotate your finger on the sensor)
4. You will need to capture the fingerprint three times- You will be shown a score for the quality of the fingerprint
5. Enrol a second finger



IMPORTANT

Colleagues then need to use the same primary finger every time you punch in

You must un-enrol leavers from the terminal

<u>**What can colleagues do on the In Touch Terminal?**</u>

- Punch In and Out
- View Current and Future Schedules
- View your Timecard
- View Accrual Balances
- Request Time Off
- Request to cover an Open Shift

Colleague Setup:

Managing People Preferences

Colleague Setup

Please note: Most of the people information is drawn from IFS; therefore it is important that IFS is up to date.

You will need to enter and keep up to date. The following People Preferences on Kronos:

1) Colleague Availability
2) Skills, Certifications and Job Sets
3) Pay Rule

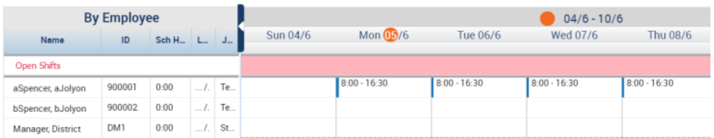
1) Schedule Pattern – This is a colleague's pattern of regularly worked shifts, which is used for the accrual of holiday entitlement.

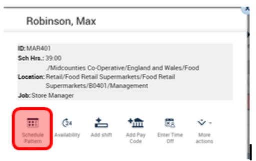
2) Availability Pattern – This is a record of the time they are avaliable to be scheduled to work, as the system uses this to create the schedule

Entering a Contrract Schedule

IMPORTANT: A contract schedule is your colleague’s usual pattern of hours. This must add up to their contracted hours.

1. In the **click View . And select By Emplyment Terms**





2. Right click on the Relevant Colleague’s Employee Number

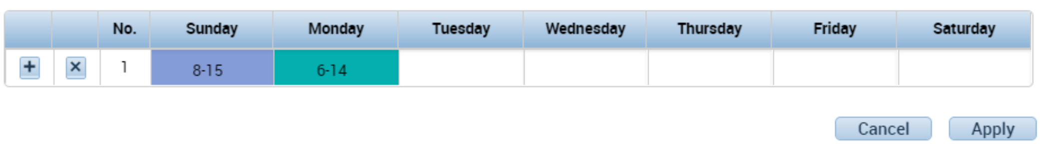
3. Click **Schedule Pattern**

Complete as below:

a. **Anchor Date:** Date the pattern should begin (must be a Sunday Date)
b. **Start Date:** Same as anchor date
c. **End Date :** Mark as **Forever**
d. **Define Pattern**: enter a number, which will define the length of the schedule e.g. 1 week, 2 week etc. A colleague working every other Sat would have a 2 week schedule.

4. Complete each field under the day with the shift times e.g. 8 00– 1500

Please use 24 hour clock format and no dot or colon.



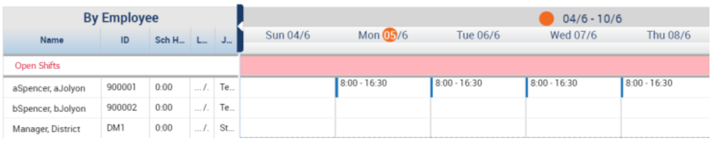
5. Click **Apply**

Please Note: Ensure that any unpaid break is deducted from the contracted hours.

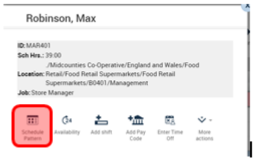
Entering a Manual Schedule

IMPORTANT: As you will have already created the rotas for the first 4 weeks of Go-Live you need to input these into the system. This is also applicable for new starters for their first 4 weeks

1. In the **Schedules Widget** > click view > select **By employment terms**



2. Right click on the Relevant Colleague's name
3. Click **Schedule Pattern**

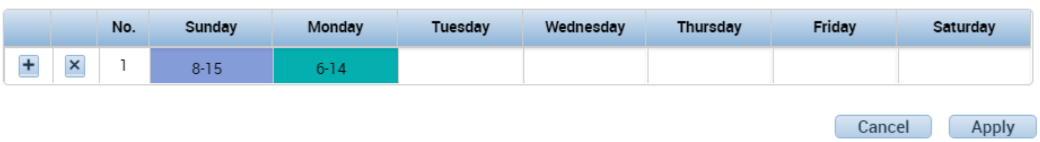


Complete as below:

e. **Anchor Date:** Date the pattern should begin (must be a Sunday Date)
f. **Start Date:** Same as anchor date
g. **End Date :** Mark as **Forever**
h. **Define Pattern**: enter a number, which will define the length of the schedule e.g. 1 week, 2 week etc. A colleague working every other Sat would have a 2 week schedule.

4. Complete each field under the day with the shift times e.g. 8 00– 1500

   Please use 24 hour clock format and no dot or colon.



5. Click **Apply**

Please Note: This is the schedule your colleagues will work until the autoscheduler begins. You can manage any exceptions to this rota on the colleague's timecard. Or schedule widget using the quick actions.

Recording Availability

Please refer to the Availability Briefing Document when having conversations with your colleagues. Availability indicates specific days and times when a colleague can and cannot be scheduled to work. Colleagues will be assigned a repeating pattern of availability. If the colleagues' availability changes, you must update his/her assigned pattern. When Workforce Scheduler generates the schedule, it checks each colleague's availability pattern and does not schedule colleagues' when they are unavailable to work.

The Schedule Planner widget uses colours to identify each colleague's availability so that you can quickly determine when the colleague is available or unavailable to work.

Availability indicators	Description
Light Green	Time when a colleague is available to work.
Grey	Time when a colleague is not available to work.
White	Time when a colleague's availability is not known. Auto-Scheduler does not schedule colleagues with unknown availability.
Pink	We are not using Preferred Time
Dark Green	We are not using Preferred Time-Off

Assigning the same pattern to multiple days

1. Click onto the boxes under the relevant day, so the fields are outlined
HOLD CTRL KEY and select days to apply pattern to more than one day e.g. availability is 10.00-17.00 (Mon, Tues and Friday)
2. Click **Hourly View**
3. Enter Start and End Times > Click **Available or Unavailable**
4. Click **Apply**.
5. Click **Save**

Entering a Colleague's Base Availability

Please refer to the Availability Brief Document

1. In the **Schedules Widget**
2. Right-click the **colleague** or to select multiple colleagues, hold the **Ctrl** key and click each colleague's name
3. Click **Availability**.
4. In the pop out box > Click **Add Pattern**.
5. Enter the Anchor Date – When the pattern starts MUST BE A SUNDAY DATE
6. **Start Date** should always match the anchor date
7. Leave the end date as **Forever**
8. In the **Pattern Name** field, enter the colleague name
9. Leave the Pattern Type as Base.
10. **Define Pattern** **-** Enter 1, 2, 3 weeks etc. dependent on the length of the pattern

The system will default to all available. We need to tell the system when our colleagues are unavailable to work.

Mark whole day

1. To mark whole days as unavailable. Drag your cursor across the green banner under the relevant day and click **unavailable**. (The day will turn grey)

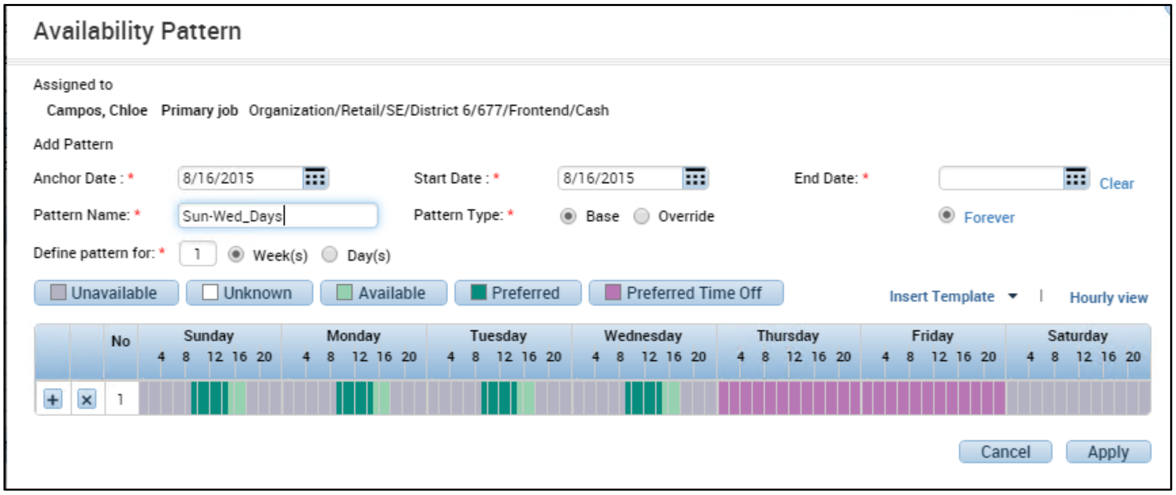
To assign an hourly availability

6. Click onto the boxes under the relevant day, so the fields are outlined > HOLD CTRL KEY to apply to more than one day
7. Click **Hourly View**
8. Enter Start and End Times > Click **Available or Unavailable**
9. Click **Apply**.
10. Click **Save**

IMPORTANT – It is important that your colleagues' availability is reflected accurately, to ensure the most accurate schedules are created.

TOP TIP

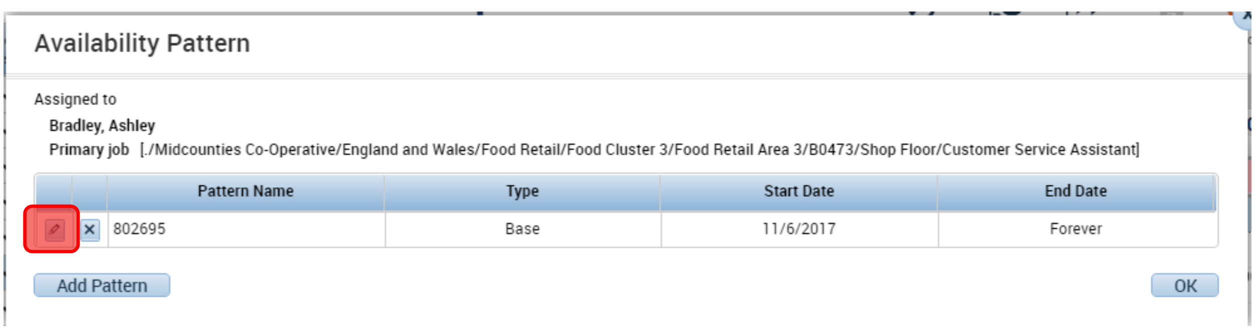
If your colleague has one period of availability per day e.g. 1000-1700 mark the whole day as unavailable in hourly view first and then add the period of availability.



Editing an existing availability or Schedule Pattern

- If your colleagues Availability or Schedule Pattern Changes, please create a new pattern and give a different name.
- This will allow you to see historical patterns and revert back to previous patterns if they change.

Don't forget to amend the end date of the pattern that is ending.

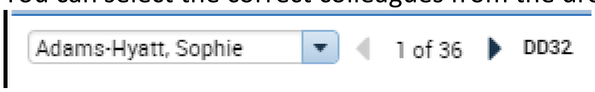


Selecting a Work Break Rule

The below action is completed in the People Editor

To navigate to the people editor:
1. In your **Related Panes Panel** > Open the **People Editor** Widget

You can select the correct colleagues from the drop down in the top right, or scroll using the arrows



Select a Work Break Rule

- **All** Colleagues will default to OT1.5 30 min unpaid (amend for management colleagues only)
- These pay codes are referring to unpaid breaks only.

1. In the **People Editor** > Go to the **Job Assignment** Tab
2. Expand the **Timekeeper** section
3. **Click into the empty cell below the current break rule** > **Select the correct break policy**

Please Note: Ensure the Work Break Rule you select is not a PFS code. (A PFS Code should be used for Paper Delivery Assistants Only)

4. Amend the **effective date** (use a Sunday Date)
5. Click **Save**

IMPORTANT INFO

All colleagues require a Work Break Rule. The Work Break rule is applicable to any colleague who has done the qualifying amount of hours.
E.g. if they are on Work Rule OTO 30 Min Unpaid, if they only work a 4 hour shift, they will not be deducted the half hour as per our policy.

If you have colleagues that have differing work break on different days you will need to manually amend their timecard to reflect this. Please refer to the Work Rule descriptions on page 49

Adding Colleagues Skills and Certifications

Scheduler uses skills and certifications to find the most qualified colleagues to fill shifts. There are minimum levels set in the system to ensure compliance. I.e. management on site at all times.

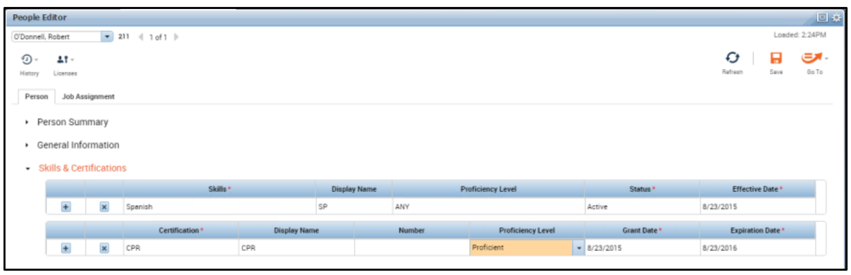
The below actions are completed in the People Editor

What is a Skill?

A skill refers to a set of responsibilities including Keyholder, Management (anyone who can be in position of duty management) or DPS (Personal Licence Holder)

To assign a skill to a colleague

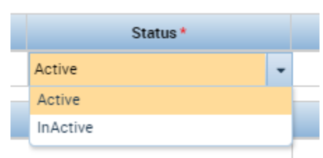
1. Open the **People Editor Widget** > Select the **relevant colleague**
2. Select the **Skills & Certifications** category in the Person tab.
3. Select the **skill** from the **Skill** drop-down list. Leave Proficiency Level as ANY
4. In the **Effective Date** field, and enter the start **date**
5. Click **Save**.



Deleting a Skill

You are not able to delete a skill; you will need to mark it as inactive if a colleague no longer can fulfil the skill defined.

1. Amend the **Status** to **Inactive**
2. Amend the **effective date** to the date it became inactive



What is a Certification?

First Aid, Fire Marshall

IMPORTANT: You can see this **information on IFS**

1. On **IFS**
2. On the colleagues record Go To> Qualifications Tab> Licenses Tab – The First Aid Certificate and Valid From and To Dates will be listed.

To assign a Certification on Kronos

1. **Go To** icon and select **People Editor** > Select the relevant colleague
2. Select the **Skills & Certifications** category in the Person tab.
3. Select the **Certification** from the drop-down list.
4. In the **Grant Date** – enter start date.   **Expiration Date -** enter the **end date**
5. Click **Save**.

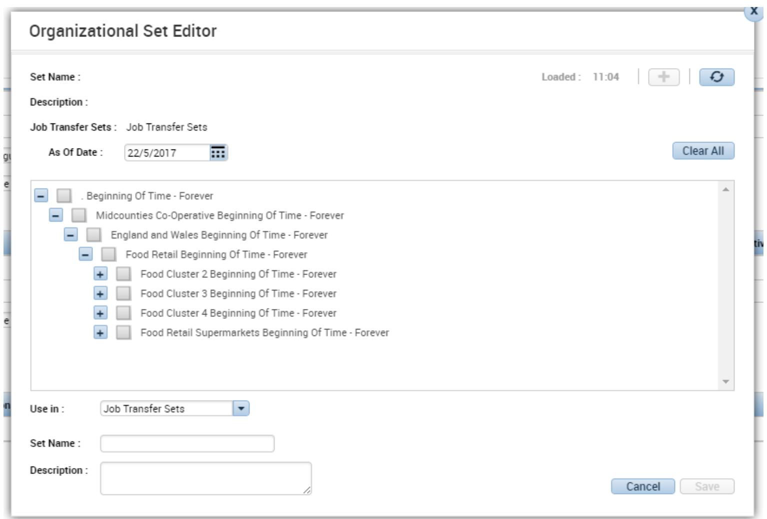
Adding a Job Transfer Set

What is a Job Transfer Set?
This is list of jobs that can be done at site e.g. Bakery, Replenishment, Till Operator. We rate this by preference to indicate how the auto-scheduler assigns these colleagues. The auto-schedule will only schedule colleagues who are listed as able to that job

To assign a Job Transfer Set

1) **In the People Editor>** Click on the **Job Assignment Tab**
2) Expand the **Employee Role**
3) Under the Time-Entry Method Table > Click **New**

This will open the Organisational Set Editor Window.



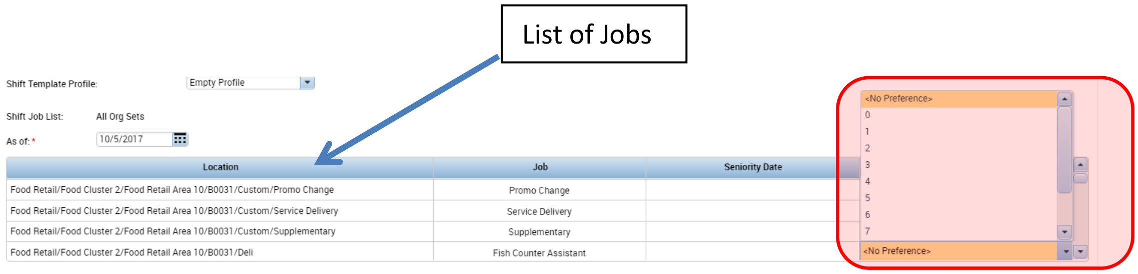
4) **Expand the tree** using the plus button, until you reach your store.
5) Expand each area with the **plus button** and **select each of the jobs your colleague is trained to do.** Click the grey box until a tick displays.
6) **Enter a Set Name:** Colleague Number
7) Click **Save**
8) Under the **Locations** table the full list of job sets is displayed.

You need to indicate preference per job

0 = not skilled in this job

10 = this job is highest preference

9) Click **Save**



Example: Billy usually works on the Till and is skilled to do Post Office, Replenishment and occasionally does Promo Change, but there are others in store if available that are more skilled at this job.

You could indicate Cashier = 10. Post Office = 8, Replenishment = 8, Promo Change = 5, Deli = 0

Troubleshooting

If you are finding that the Auto-Scheduler is repeatedly not scheduling a particular colleague for a job at store, please check that their availability pattern is correct and that they are listed as having the skill set to do this job.

Reporting

Genies

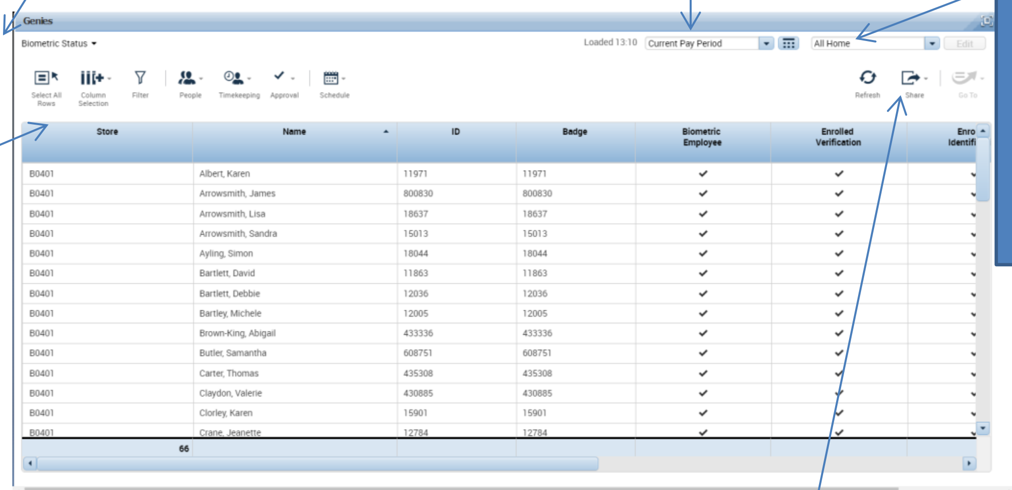
Genies are a type of report. You can navigate from the Genie to other areas of Kronos using the Go To Button. They can be accessed by using the Genies Widget and changing the Genie Drop Down.

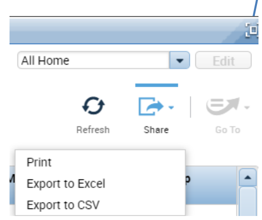
Genie Drop Down
You can select a Genie from the Drop Down List

Context Selector
You can select the Date/Time Period from this drop down or use the calendar picker

Column Headers
Click on the column headers to reorder

Location Selector
You can select the Location you wish to review the information for, from the drop down



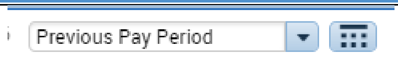


Share

You can print, or export to Excel or CSV

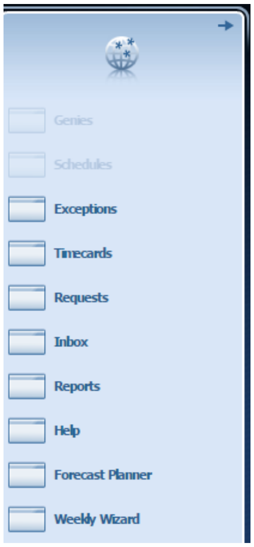
Genie Descriptions

Genie Name	Description
Weekly Summary Genie	Shows you each of your colleagues and whether their timecard has been Approved and Signed Off
Store Absence Summary	Shows you the Total Hours Annual Leave, Authorised Absence, Maternity, Bereavement Leave and further absence reasons for the given Pay Period. You can change the Time Period displayed by amending the Context

	Selector  in the top right of the Genie.
Accrual Reporting Period	Shows you the 6 Accrual Balances for each of your colleagues: Annual Leave, Sick Balance, Max Sick Entitlement, Birthday Hour, Annual Leave Earned and TOIL. You can use this to see a summary of any accruals left to be taken for your colleagues, useful for ongoing review of holiday and TOIL hours left to be taken.
Hours Worked By Store	Shows you the number of hours worked at your site, for a given period. You can change the Time Period using the Context Selector in the Top Right of the Genie
Biometric Status	Shows you which colleagues are enrolled on the Clock. This is useful when completing colleague setup, as you can easily identify which colleagues are still to enroll.
Balances	Another view of Accrual Balances per colleague This Genie also shows you the weekly contracted hours for each of your colleagues. This Genie shows any balances associated with each colleague.
Quick Find	A useful search tool for finding a colleague in the system

Scheduling Reports

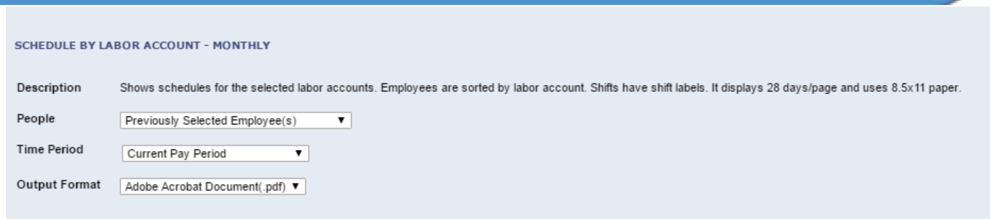
You have access to a variety of reports on scheduling and Time and Attendance including:

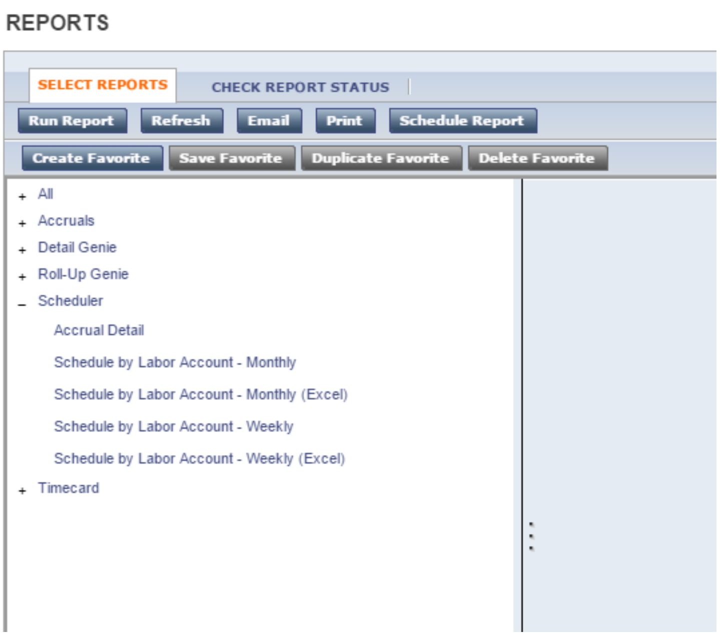


To access the Reports

1. Click on the **Reports Widget** in the **Related Items Pane** > Click the **plus sign** to expand the scheduling reports
2. Select your report – where possible use the (Excel Version)
3. Complete the drop down options to specify your report by **People and Location**
4. Select the **Output Type –** Excel or PDF
5. Select All Home Locations to see your whole site.
6. Click **Run Report**
7. Click **Refresh Status** > until the status is complete
8. Click on the **name of the Report** and then Click **View Report** from the top buttons.

This will open your report





Report Name	Detail
<u>Expand the Schedule Reports</u>	
Schedule by Labor Account – Monthly/Weekly	Shows the rota for the selected period
Accrual Detail	Shows you by Colleagues the full list of the TOIL, Annual Leave, Sickness, Birthday Hour Balances and hours earned to date.
Actual Hours by Scheduled Hours	Will show your forecast labour hours and cost vs your actual. This is a good indicator as to whether your store staffing levels are accurate, and how much you are having to alter the schedule

Actual/Adjusted: Show hours worked in this period only.

Pay Code		Actual Hours	Scheduled Hours	Projected Hours	Variance Hours	Actual Wages	Scheduled Wages	Projected Wages	Varia Wa
Worked Job: ./Midcounties Co-Operative/England and Wales/Food Retail/Food Cluster 2/Food Retail Area 10/B0211/Management/Team Leader									
Smith, April	ID APS211								
OT1.0		7:00	7:00	0:00	0:00	£70.00	£70.00	£0.00	
Smith, Tia	ID TIS211								
@ALL Time to be Paid at Basic		15:00	15:00	0:00	0:00	£150.00	£150.00	£0.00	
Basic		15:00	15:00	0:00	0:00	£150.00	£150.00	£0.00	
Totals for Job:		37:00	37:00	0:00	0:00	£370.00	£370.00	£0.00	
Worked Job: ./Midcounties Co-Operative/England and Wales/Food Retail/Food Cluster 2/Food Retail Area 10/B0211/Shop Floor/Customer Service Assistant									
Smith, Tom	ID TOS211								
@ALL Time to be Paid at Basic		7:30	7:30	0:00	0:00	£75.00	£75.00	£0.00	
Basic		7:30	7:30	0:00	0:00	£75.00	£75.00	£0.00	
Unapproved		2:00	0:00	0:00	(-2:00)	£0.00	£0.00	£0.00	
Totals for Job:		17:00	15:00	0:00	(-2:00)	£150.00	£150.00	£0.00	
Grand Totals:		203:00	254:30	0:00	51:30	£1,997.50	£2,530.00	£0.00	£5

Total Number of Employees:6

Employee Availability	You can specify the time period and then view colleague’s availability per date. This could be helpful in identifying time when you have less flexibility in store.
Open Shifts – Weekly/Monthly	Useful to identify open shifts in a given period,which will indicate where there are holes in the schedule.

Timecard Reports

Report Name	Detail
Expand the Timecard Reports	
Hours by Labor	You can see wages spent at a certain cost centre You can also specify a particular paycode to see Holiday Hours paid, overtime hours paid, etc.

	Money	Hours	Days	Wages
Grand Totals:	£0.00	203:00	0.00	£1,997.50

Pay Code Summary	Money	Hours	Days	Wages
@ALL Time to be Paid at Basic	£0.00	84:00	0.00	£840.00
Basic	£0.00	84:00	0.00	£840.00
OT1.0	£0.00	31:00	0.00	£310.00
OT1.5	£0.00	0:30	0.00	£7.50
Unapproved	£0.00	3:30	0.00	£0.00
Grand Totals:	£0.00	203:00	0.00	£1,997.50

Jargon Buster

Accrual	An accrual is a number of hours that increase as earned. We have accrual balances for holiday and TOIL.
Context Selector	Where to select the time period you want to view
Job Transfer Set	The jobs that a colleague is trained to complete at site e.g. replenishment, bakery
Genie	A report that you can navigate to other functions from
Labour Forecast	Predicted number of hours need at your site for the tasks, based on the volume forecast.
Metric	A report on the jobs and hours at site
Paycode	Reasons for a adjustment to normal hours or pay e.g. TOIL, Annual Leave, Community Hours
Related Items Pane	The List of additonal features on the right hand side of your screen
Rule Violations	Alerts of schedules/hours and shifts that are against the configured rules
Volume Forecast	Predicted Sales/Transactions and Items for a given period of time for a site
Widget	A function that opens a new tab

Work Rule Definitions

Work Rule	Definition
MCC OT0 30min Deduction	Colleague paid at basic with no overtime & 30 minute unpaid break
MCC OT0 60min Deduction	Colleague paid at basic with no overtime & 60 minute unpaid break
MCC OT0 No Deduction	Colleague paid at basic with no overtime & paid break
MCC OT1.5 30min Deduction	Colleague paid at Time and a half with 30 minute unpaid break
MCC OT1.5 60min Deduction	Colleague paid at Time and a half with 60 minute unpaid break
MCC OT1.5 No Deduction	Colleague paid at Time and a half with paid break
MCC OT1 30min Deduction	Colleague paid at Time with 30 minute unpaid break
MCC OT1 60min Deduction	Colleague paid at Time with 60 minute unpaid break
MCC OT1 No Deduction	Colleague paid at Time with paid break
TTO OT1 30min Deduction	Term Time Only Colleague, paid at time, 30 minute unpaid break
TTO OT1 60min Deduction	Term Time Only Colleague, paid at time, 60 minute unpaid break
TTO OT1 No Deduction	Term Time Only Colleague, paid at time with paid break