Colleague Setup Quick Guide - FOOD

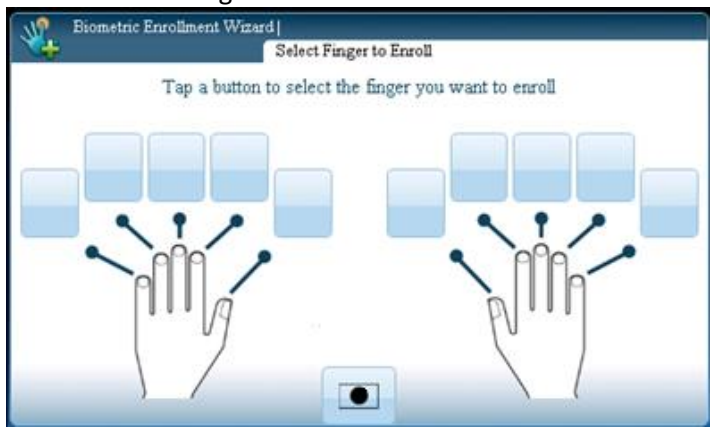
Enrolling colleagues on the clock

You need to enrol any new colleagues onto the clock. You can un-enrol leavers

Enrolling Colleagues at the In Touch Terminal

1. Log On
2. Click on **Enrol Employee**
3. **Enter the Colleague's 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 need to use the one of the fingers they have enrolled every time they punch in

You will need to un-enrol leavers from the terminal > Click Un-enrol User

Set a Contract Schedule

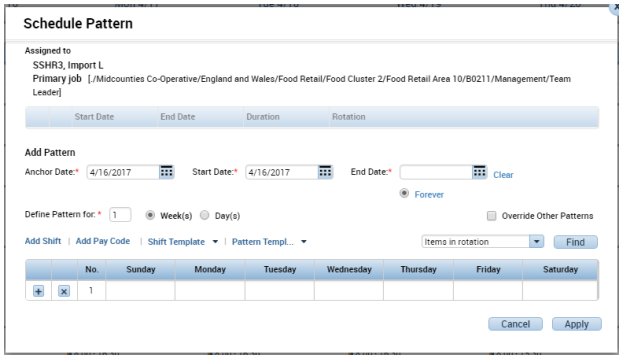
You need to create a base contract schedule that the sickness and annual leave is calculated against

1. From the **Schedules** Widget
2. Go to **View** > From the drop-down menu **By Employment Terms**

IMPORTANT – you must change the view on schedules drop down to **BY EMPLOYMENT TERMS**

3. Right Click on the Colleague's Employee Number > Select **Schedule Pattern**

This will open the schedule pattern window.



Complete as below:

a. **Anchor Date:** Date the pattern should begin (must be the **GO LIVE 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.
e. **Complete each field under the day with the shift times** e.g. 800 – 1500 Please use 24 hour clock format

Using Pattern Templates

There are some pattern templates set in the system, for commonly used pattern of hours. You can select a Pattern Template from the Pattern Template drop down menu e.g. 600-1400. You can then still edit the pattern.

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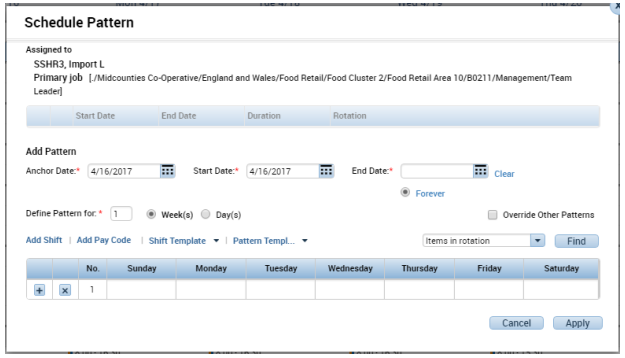
Entering a Manual Schedule (ONLY APPLICABLE BEFORE SCHEDULING)

You need to create an employee schedule that the colleague will work until the introduction of auto-scheduling.

1. After creating the **Contract Schedule** go to the line below
2. Right Click on the Colleague's Name > Select **Schedule Pattern**

This will open the schedule pattern window.



Complete as below:

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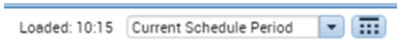
b. **Start Date:** Same as anchor date
c. **End Date :** Mark as **forever**
d. **Define Pattern**: enter a number, which will define the length of the schedule e.g. 1 week, 2 week etc. A colleague working every other Sat would have a 2 week schedule.
e. **Complete each field under the day with the shift times** e.g. 800 – 1500 Please use 24 hour clock format

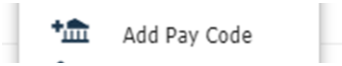
Entering Authorised Holiday

As part of your Kronos Set Up you will need to add any previously authorised holiday. In future Annual Leave Requests will be managed through automated request alerts

1. In the **Schedules Widget**
2. Select the appropriate date from **Context Selector**



3. Locate the correct colleague and date > **Right click on the shift**
4. Click **Add Paycode**



The Paycode window will open

5. Complete the following:

Effective Date: The Date the Time-Off Starts
Paycode: Select from the drop down
Amount: Select Full or Half Day
Leave Override Shift as displayed
Select **Whole or Partial Shift**
Start Time: E.g. 1200
Comments: Add comments if necessary

6. Click **Apply**

Or alternatively use the **Quick Actions Toolbar** to apply holiday to colleague shifts

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Adding a Work Break Rule

This defines whether the length of the unpaid break your colleague is allocated

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 (Default)

Select a Work Break Rule

- **All** Colleagues ~~should~~ will default to~~be~~ OT1.5 30 min unpaid – therefore applying a 30 min deduction to qualifying shifts (please amend to the appropriate break for colleagues)
- 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.
4. Amend the **effective date** (use a Sunday Date)
5. Click **Save**

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

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.
If colleagues are paid for their breaks, please select a No Deduction Pay Rule.
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

Entering Colleague Availability

Each colleague needs to be assigned an Availability Template which will indicate when they can be scheduled to work

Please refer to the Availability Brief Documents

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. Enter the **Anchor Date** – When the pattern starts MUST BE A SUNDAY DATE
5. **Start Date** should always match the anchor date
6. Leave the end date as **Forever**
7. In the **Pattern Name** field, enter a **name** e.g. name of colleague
8. Leave the Pattern Type as Base.
9. **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 colleague 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

3. Click onto the box under the relevant day, so the fields are outlined

To select multiple days > HOLD CTRL KEY and select days to apply pattern to more than one day e.g. availability is 10-17 (Mon, Tues and Wed)

4. Click **Hourly View**
5. Enter Start and End Times > Click **Available or Unavailable (Don't forget to select this!)**
6. Click **Apply**
7. Click **Save**

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

Top Tip > Before you start inputting availability change all days to unavailable will save time for allocating one block of availability

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Entering Job Sets

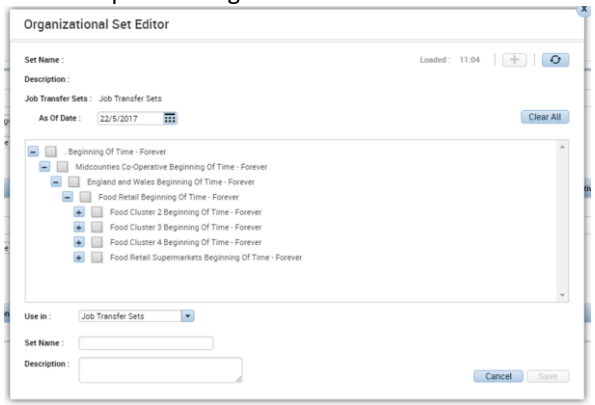
What is a Job Transfer Set?

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.

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 preferred

9. Click **Save**

Entering Skills, Certifications

We need to enter the above to indicate what job colleagues can be scheduled to do.

What is a Skill?

A skill refers to a set of responsibilities including Key holder, Management (anyone that can be in a positon of duty management) or DPS (Personal Licence Holder)

To assign a skill to a colleague

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

What is a Certification?

First Aid, Fire Marshall

Please Note: The end date is the expiry date of the certificate and this information can be found on IFS under the Qualifications Tab

To assign a Certification

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

Special Events

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 week 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

ORDER TO COMPLETE

1. Work Break Rule
2. Contract Schedule
3. Manual Schedule
4. Availability
5. Skills and Certifications
6. Job Sets
7. Annual Leave already booked (must be down Week + 1 after Go-Live)