CMHC Scheduler Users Kronos Version 8 Upgrade Instructions

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• Working with the Staffing Widget (Staffing-CMHC)	

• Entering Schedule Patterns

ACCESSING KRONOS® TIME AND ATTENDANCE SYSTEM

In order to access the KRONOS® system, open Google Chrome (*preferred*), Internet Explorer, or Firefox and type the following URL:

https://timereport.uchc.edu/

A Kronos icon is also located within the UConn Health Applications folder located on your computer's desktop.



INSTALLING ADOBE FLASH PLAYER

After entering or clicking the Kronos URL/icon, you may be prompted to **install Adobe Flash Player** (see screen below). Click on **"Get Flash"** to begin the installation. If there is no "Get Flash" prompt, proceed to the next page.

**If you are unable to install Adobe Flash and the Kronos system prohibits you from logging in after a few minutes, please call the Helpdesk at ext. 4400.

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LOGGING ON

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KRONOS ®	
	UConn Health Version 8.0.15
	Production 01
User Name	Environment
Password	
	•

- Type in Username and Password:
- Your KRONOS username and password are the same as your UConn Health **network** username and password.
- Click **Log On** button on the right of the Password text box.

CMHC Approver, Editor, & Scheduler Navigation

Note: If you are only a scheduler you may not have all the options available below



- <u>Manage My Department tab</u> home navigation tab to access various Genies and Related Items bar. Note: when clicking Timecards, Scheduler-CMHC, Reports etc..., new tabs open to the right of the Manage My Department tab. Hover over the tab and click X to close or refresh icon.
- <u>Genies drop down list</u> (old My Genies tab) select the appropriate genie to view: My Employees, Employees Data, Reconcile Timecard, Pay Period Close, VOT-Use FTYD, ESOS-Use FYTD etc...
- <u>Go To drop down</u> select employee(s) and then click Go To to go to *selected* employee(s) Timecard, Schedule(Scheduler-CMHC), People record or to run a Report on the *selected* employee(s). Selected employee(s) specific.
- <u>**Related Items bar**</u> click to go to *All* your active employees (All Home) Timecards, Scheduler-CMHC (*previously named CMHC Schedule Planner*), People record or to run Reports on All Home/Group of employees.
- <u>Scheduler-CMHC</u> (previously called CMHC Schedule Planner) click to view your employees schedules as a group and coverage counts.
- <u>Alerts</u> click to see employees with timecard exceptions for the *current* pay period such as Missed Punch, Unexcused Absence, Very Early In, Very Late Out, Unscheduled, and Invalid Duration.
- Columns drop down hover over any column heading, click the down arrow, and select sort or group by.
- <u>My Timecard</u> Salaried Employees Only (located on the Related Items bar on right) click to enter, edit, view, and approve your own time report. (*refer to salaried employee timecard navigation on last page*)

Scheduler-CMHC Navigation

Navigation Tabs Opened: Manage My Department (home), Sabadular CMUC

Gantt

View

Date Tabs: Weekly(top) & Daily(bottom). Click and drag across tabs to view specific dates



Group View: drop down list: Select locations, Saved Queries

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Violations, etc...

Daily Coverage, Rule Violations, etc.

Save & GoTo

- **Group View**-select employee group to view by clicking the drop down and clicking a saved query or Select Locations.
- Hover over Employee's Name view the employee's column data such as title, pay rule etc. Click and drag edge of column headings to expand column data.
- Add a Shift right click on employee's appropriate dated cell and then click *Insert Shift Template* or Add Shift.
 - **Insert shift template** this option will only appear when right clicking on empty cells. After selecting, scroll up and down to find shift or type in the search box to search the name and description. Searches alpha characters and numbers. (Example-G pulls shifts containing G, 7a –pulls shifts containing 7a)
 - Add Shift After selecting, you can insert a shift template by clicking Insert Template (located below employee's name of Add Shift window) or enter manual times if needed. If choosing Insert Template scroll up and down to find shift or type in the search box to search the name and description.
- Add a Pay Code right click on employee's appropriate dated cell and then click Add Pay Code.
- Right Click on a Shift or Pay Code edit, delete, cut, copy, paste etc.
- **Date tabs** Weekly tabs (top) and Daily tabs (bottom). Click and drag cursor across the tabs to change your timeframe view to just the tabs selected. Click on a date or weekly tab and you will just view that 1 day or week.
- **Daily Coverage, Rule Violations etc.** to view click and drag the bar up as shown in graphic above.
- **Gantt View** click for a more visual view of schedules. Useful for viewing small timeframes like a day or week. Click button again to go back to previous view (tabular view).
- **Save** click Save to save schedule changes.

Scheduling Department/Job Transfers and/or Work Rule Transfers

In order to add a Department/Job transfer and/or a work rule transfer to a scheduled shift do the following:

- Pull up the appropriate employee's schedule by either one of two ways listed below:
 - Individual Employee Schedule View –search for the employees name using My Employees genie on the Manage My Department tab, clicking on name, clicking GoTo button, and then clicking Scheduler-CMHC. (My Employees as shown on page 4)
 - **Group View** –select the Group View drop down and select the appropriate home location of the employee. (Scheduler-CMHC as show on page 5)
- Add a Shift or Edit the shift (if already exists) by right clicking on the appropriate dated cell or shift (if editing).

• Department/Job Transfer

- Click in the Job Transfer cell, click the down arrow, and then click Search. (see Graphic A)
- Transfer Window appears: (see Graphic B)
 - Click the + next to the appropriate FU the employee is transferring to, click + next appropriate department, click the button next to the job the employee is working.
 - Click Apply
- Click **Apply**, if a work rule transfer is <u>not</u> needed or if it is already added.

	Transfer
	Name Campbell, Diana D Job CMHC/FU2/GARNER-MED/NUR Work Rule
Edit Shift	Job Transfer Work Rule
Assigned to Campbell, Dians D Shift Details 8:00sm-4:00pm(8:00h) Primary Job Organization/UCHC/CMHC/FU8/HARTFORD-MED/NUR Insert Template Shift Label HP-VOT Repeat this shift for days	CMHC 6/03/2011 - Forever CMHC 6/03/2011 - Forever FUI 6/03/2011 - Forever FUI 6/03/2011 - Forever FUI 6/03/2011 - Forever
Start Date Type Start Time End Time End Date Duration Job Transfer Fork Rule Transfer 4	GARNER-ADM 6/03/2011 - Forever
• x 1/27/2018 Transfer 8:00am 4:00pm 1/27/2018 8:00 • 1199C & rr (4p) VOT Organization/UCHC/CMHC/I Search •	GANREH-UEN 6/3/2011 - Forever
Cancel Apply	Cancel Apply

• Work Rule Transfer

- Click in the **Work Rule Transfer** cell, click the **down arrow**, and then choose the appropriate work rule. (see Graphic C)
- Click **Apply**, if a dept/job transfer is <u>not</u> needed or if it is already added.

Start Date Type Start Time End T + × 1/26/2018 Transfer 8:00am 4:00	me End Date Duration Job Transfer m 1/26/2018 8.00/GARNER-MED/	r Work Rule Transfer
+ x 1/26/2018 Transfer 8:00am 4:00	m 1/26/2018 8.00:/GARNER-MED/	
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Managing Timecards Navigation (Hourly Employee Displayed)

avigation Tabs Opened: anage My Department (home), mecards	Arrows to To Selected Emp	ggle b/n loyees	Time I Select	Period dr time perio	r op down: od	Calenda Specify	r icon: range of d	ates	Query Vi Selection
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Approve/ Remove	1 of 1 ▶ <mark>1</mark> MP18				Loaded	: 10:03 AM Previous Pe	Period	1 Employ	se(6) Selected
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+ × Mon 1/08 7:004	AM-3:30PM	6:	53AM	3:29PM			8.0	8.0	16.0
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- **<u>Right Click on Employee's Name</u>** view the employee's pay rule and home account.
- <u>Right Click on Punch</u>
 - **Edit** cancel meal deduction, Override Punch (new shift, in-punch, out-punch)
 - **Comments** add comment to punch
 - Mark as Reviewed mark the exception (late/early punch etc...) as reviewed. Changes color from red to green. Also, removes the alert.
- <u>Add a Row</u> click on the + icon to create a blank row below.
- <u>Delete a Row</u> click on the X icon on the row you wish to delete.
- <u>Calculate Totals</u> click Calculate Totals to update the hours and totals without saving.
- <u>Save</u> click Save to update the hours and totals at the bottom of the timecard and save changes.
- <u>Approve Timecard / Remove Approval</u> click Approve Timecard button and Approve Timecard or Remove Timecard Approval. Approve Timecard will change the timecard color and the options to add pay codes and delete rows is no longer available.
- <u>Query View</u> select employee list from available query list (*All Home*-active emps, *All*-inactive & active emps).

Managing Timecard Alerts

Alerts identify possible required actions for the time approver. If any employees have a timecard exception (such as missed punch, unexcused absence, very early in, very late out, unscheduled, and invalid duration) in the *current* pay period a number displays in the top-right corner of the alerts ! icon (See graphic A). The number corresponds to the number of employees with exceptions, not the number of exceptions per employee.

- <u>Click Alerts (!)</u> if you have an alert a number will appear next to the alert ! icon.
- <u>Click on Employee's Name</u> –brings you to the exceptions view (graphic B) for the selected employee to resolve the alert.

	Refresh Alerts	Alerts	Employee A	Alert List	View All
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★ Manage My De Genies	partment 🛿 💮 Alerts and No	Exceptions Alert Category Exceptions Alert (1) CUMBRANO 18, CARLOS H [1/19-2/01] View	as 3 exception(s)	*	Genies Timecards Schedules Reports

- <u>Add a Punch</u> on the appropriate dated row, double click in the in or out punch cell and enter time. Then click Save. (See graphic B)
- <u>Add a Pay Code</u> on the appropriate dated row, click the green circled + icon. Select the pay code, enter the hours, and click Ok. Then click Save. (See graphic B)
- <u>View Timecard</u> –brings you to the employee's timecard to review the resolved exception. (See graphic B) *Note: instead of resolving the exception in exceptions view, you can resolve the exception directly in the timecard.*
- <u>Action Buttons</u> click on the appropriate amount or in/out punch cell, click appropriate action button. Then click Save for action to display. (See graphic B)

Add Pay	⁷ Code	In. do	/Out Punch uble click	Cell:	View T	`imecar	d Sav	e
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Salaried Employee Navigation

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Add Pay Code:		<enter code="" pay=""></enter>											
<enter code="" pay=""></enter>	×	Daily Total		8.0			8.0	8.0	8.0	8.0	40.0		
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Click & drag bar up or down to make Timecard area wider/narrower

- <u>Add an Additional Pay Code</u> click on <Enter Pay Code> on the appropriate row. *Note: in order to add multiple pay codes, you must either click Calculate Totals or Save for a new row to be inserted.*
- <u>Delete a Row</u> click on the X icon on the row you wish to delete.
- <u>Calculate Totals</u> click Calculate Totals to update the hours entered and totals without saving.
- <u>Save</u> click Save to update the hours entered and totals at the bottom of the timecard.
- <u>Approve Timecard / Remove Approval</u> click Approve Timecard button and Approve Timecard or Remove Timecard Approval. Approve Timecard will change the timecard color and the options to add pay codes and delete rows is no longer available.

Workforce Scheduler¹¹⁰ Working with the Staffing widget



The Staffing widget offers a flexible, easy, and robust experience to managers who maintain daily schedules. This job aid describes benefits and features of the Staffing widget.

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Key benefits of the Staffing widget

- An intuitive and easy-to-use interface that lets you perform actions quickly and easily
- Visual cues and tools to facilitate daily decisionmaking
- Flexibility for managers to view only what they need to see to maintain their daily schedules.

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	Heldt, Roberta		RN	148	•		Mayna	ard, Doris		NrsMgr	D8		-
	LeGault, Kara		LPN	D8			Moran	, Virginia		RN	D8		-
	Regan, Elinor		RN	D8	-		Power	s, Pamela		LPN	N8		-

Tailoring your widget views

The Staffing widget toolbar has selections and tools that let you customize your view. The following screenshot highlights the view tools in the Staffing widget toolbar.



- A **Employee pool** icon lets you toggle between showing and hiding the Employee pool.
- **B** Day selection options let you choose yesterday, today, or tomorrow to display in the widget. The calendar selector lets you choose a specific date other than these, as needed.
- C Location selection filter lets you choose All Home Locations or Select Locations such as specific units, and specific jobs within those units.
- Day part selection filter lets you choose All Day or individual schedule zones or shift sets you want to see. You can also define the hours of a time span that you want to see. (For more information on how to define a time span, see the Define time span topic in this job aid.)
- **E** Job selection filter lets you choose All Jobs, or one or more individual jobs that you want to see.

- **F** Shift filter lets you view all shifts, or select Coverage Setting to display shifts based on coverage settings for the selected locations. For example, certain pay codes might be excluded that do not count towards coverage.
- G Refresh lets you refresh the items on the page to display any changes that might have been made by other managers.
- H Pinned/All Units lets you select units to be displayed side-by-side on a page, as needed. (For more information on how to pin units, see the Positioning units for easier transfers topic in this job aid.)
- **Quick Actions** icons are available in the toolbar and allow you to perform common, repetitive scheduling tasks guickly.



Positioning units for easier transfer

You can select specific units that you want to display next to one another in the widget, to make it easier to view and edit shifts and make transfers. Click the pin icon on any unit to select it as a "pinned" unit.

After

Pinning and viewing pinned units

- 1 Click the pin icon on the units that you want to display together. The pin icon is red on units that are pinned. (Note: Click the pin icon of a pinned unit to unpin it.)
- 2 Click the **Pinned** indicator to display only the selected pinned units.

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	Open Shift	RN	NB	-		Davison, Helen	LPN	E8	-	Open Shift	RN	NB	
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	Angel, Christine	LNA	EB	-		Finnern, Barbara	RN	N8	-	Farnsworth, Tina	LNA	N8	
	Busa, Katelyn	LNA	D8			Gaetani Peter	RN	E8	-	Jackson, Joan	RN	Vacation	
	Carstensen, Mary Ann	LPN	D8	-		Gaudio, Leslie	LPN	D8		Kamensky, Annie	RN	E8	-
	Heldt, Roberta	RN	N8	-		Goettle, Diedre	LPN	Vacation		Lohn, Joseph	RN	N8	-
	LeGault, Kara	LPN	D8			Isaacson, Sandy	LINA	D8	-	Maynard, Doris	Nrs	. D8	-
	Regan, Elinor	RN	D8	-	*	Moran, Virginia	LPN	D8	-	Powers, Pamela	LPN	NB	
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Note

If you have too many units to fit on one page, page controls will appear at the bottom of the Staffing widget. Use the page controls to navigate to other pages and pin units to view.



The Pinned indicator displays a red pin icon when units are pinned. Pinned units appear side-by-side.

4 Click the **All Units** indicator to return to the view of all pinned and unpinned units.

	CAN STREET	Carlo Decision provide	and the second second second	-	-	
		Today	Elected Locations 3		4	
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		. (8)	an Surg			
🗸 0 🖞 2.7 PIN	0 SCH 2.7 VC	DL 0	🕹 4.4 💮 1.6 PL	N 61 SCH 3.3	VOL 0	
Open Shift	LNA EB		Open Shift	LNA	NB	
Open Shift	LPN N8	•	Open Shift	LPN	NB	-
Open Shift	RN N8		Open Shift	RN	NB	
Alcaino, Alissa	RN E6	•	Open Shift	RN	E8	-
Angell, Christine	LNA E8	•	Farnsworth, Tina	LNA	NB	
Busa, Katelyn	LNA D8	3 - 👻	Jackson, Joan	RN	Vacation	
Carstensen, Mary Ann	LPN D8	•	Kansensky, Annie	RN	E8	-
Heldt, Roberta	RN N8		Lohn, Joseph	RN	NB	
LeGault, Kara	LPN D8		Maynard, Doris	NrsHgr	D8	
Regan, Elinor	RN D8	•	Powers, Pamela	LPN	NB	
Somerset, Samantha	LPN E8	*	Ross, Daniela	LPN	EB	
			Sadler, Monica	LNA	E8	
			Shephard, Rita	LNA	E8	-
			Vincent, Joanne	LNA	E8	-
			Yen, Nora	CSMgr	D8	-
			Young Vakina	1.001		



The blue bar at the top of each unit displays coverage information.



- A Undercoverage is indicated by a down red arrow. A check mark indicates that there is no overcoverage.
- B Overcoverage is indicated by a blue up arrow. A check mark indicates that there is no undercoverage.
- **C Planned** is indicated by PLN; it is the sum of all people hours in the adjusted workload plan for a time span, divided by the time span.

D Scheduled is indicated by SCH; it is the sum of all people hours that are scheduled for the defined time span, divided by the time span.

E Volume is the projected volume for the selected time span.

Viewing coverage details

Click the blue bar at the top of each unit to display detailed coverage information by job.

	Open Shift		LNA E8	-		
	Angell, Christine		NA E8	-		
	Busa, Katelyn	## Float				0
	Cabral, Carmen		↓ 1.7 ☆ 0.5	PLN 9.8 SCH 2.7	VOL 0	
	Cai, Samantha		Pin	Sch	Var	1X
	Carstensen, Ma	RN	3.90000	1	\$ 2.90000	
z	Doma, Devon	LPN	3.30000	0.40000	\$ 2.90000	
		LNA	2.60000	1.30000	4 1.30000	

Working with shifts

Several visual cues and shortcuts make working with shifts easy and efficient.

Identifying shift information

You can use the following icons and colors to identify information about shifts that appear in the Staffing widget.

		♦ Float				
A Open shifts appear in red text.			🐥 7.3 🟠 0.3 PLN 9.8	SCH 2.9	VOL D	
		445.85%	Open Shift	LNA	E8	-
D LOCKED SHITTS are indicated with the lock icon.			Open Shift	LPN	N8	-
C Comments and notes are indicated with the note bubble icon.	в-	8	Angell, Christine	LNA	E8	[2] -
	3		Busa, Katelyn	LNA	D8	
D Shifts with pay codes appear in green text.	C –	•	Cabral, Carmen	LNA	E8	•
E Transferred shifts and shift segments are indicated with	D		Cai, Samantha	LPN	Vacation	
a double arrow icon.		\$	Carstensen, Mary Ann	LPN	D8	[2] 🔻
F Shifts with Warning rule violations are indicated with an exclamation point.	E-	2	Dorna, Devon	RN	N8	-
			Fennell, Roxanne	RN	E8	-
			Heldt, Roberta	RN	N8	÷
	F	1	Morse, Lucy	LNA	E8	-
			Regan, Elinor	RN	D8	•



WORKTORCE SCHEQUIER Working with the Staffing widget



VO

E8

N8

E8

D8

3:00PM - 7:00PM

7:30PM - 11:30PM

۲

[2] -

Transferring shifts and shift segments

You can transfer whole shifts and segments of shifts in the Staffing widget.

Shifts that have segments display the number of segments in brackets after the shift line item. You can expand the shift to display the segments, as shown in the screenshot to the right.

You can click and drag a whole shift or a shift segment to another unit to perform a transfer.

Adding	an	open	or	assigned	shift	to a	unit
--------	----	------	----	----------	-------	------	------

You have the flexibility to add either an open shift or a shift with an employee assigned to a unit.

To add a shift:

- 1. From the applicable unit, click the action drop-down list and select Add Shift.
- 2. Use the Add Shift dialog box to enter the applicable shift information (see the *Editing shift attributes in the Shift Editor* topic, below).

41	loat
٠	Sort Employees by Name
	Sort Employees by Job
	Sort Employees by Start Time
	Sore employees by Start Time
	Add Shift

PIN 9.8

5CH

LNA

LPN

LNA

LNA

LNA

LNA

Editing shift attributes in the Shift Editor

You can easily perform editing tasks directly from the Add Shift/Edit Shift dialog box.

	Add Sh	ift A								В								×
	Unassi	gned	•) Shift	Details	Shift Start	Date: 5/0 Time: 7:0	01/2015 Dur 00AM Prin	ation: nary Joi	8:30 b: Unspe	ified)				
C	Inse	rt Template		Shift Lab	el: [8												
E	× +	Start Date 5/01/2015	bu	Type Regular	•	Start Time 7:00AM	End Time	End Date	5 🖼	Duration 8:30	Skill & Cert. All Items	Profiles	Transfer t/CityN/Float/RN	-	Work Rule	-	Details	-
	Comm	ents (1) epartment §	Short	age														\exists
	Sielect	a comment															Ad	d
															ОК		Cano	el

Float

Open Shift

Open Shift

Angell, Christine

Busa, Katelyn

- A Employee name: Select either the name of the employee to whom to assign the shift or Unassigned to create an open shift. Available employee names are based on the selected location.
- B Shift details: This section displays information about the shift.
- **C** Insert Template: Click to find and insert a shift template. If you select a shift template, the information in the shift segments is overridden.
- D Shift Label: Lets you add a shift label. If the shift template information has been modified, it is recommended that the label also be modified to reflect these changes.

- Shift Segments: Add or delete a shift segment using the + and x icons.
 - Use the **Transfer** drop-down to select a job associated with the selected location.
 - If required, use the Work Rules drop-down to select a work rule to apply to the shift.

RN NO

Comments: Used to add comments and notes to the shift.

To edit a shift:

- Hover on the applicable shift and then click the arrow icon in the circle.
- 2. Select Edit Shift.
- 3. Make the necessary changes to the shift, and then click **OK**.

Instructions on Entering Schedule Patterns for Employees

- 1. To find an Employee using My Employees, type part of lastname with an asterisk(*) Ex – zumbrano* (as seen below)
- 2. Click on Employee Name (highlights in light blue, ex. ZUMBRANO1,CARLOS) (as seen below)
- 3. ****Important:** Select the Time Period you want to enter the schedule pattern for. (Kronos will NOT let you save your schedule pattern if the Scheduled Start Date is outside of you Time period selection.)

Anage My Department	2						
Genies					2		
My Employees 👻 zumbrano*	Q				Loaded 11:11AM Current P	Pay Period 💌 📰	
Select All Column Filter Rows Selection	People Timekeepin	Approvel				Share Go To	Genies
Name	 Employee ID 	Manager	Dept	Dept Name	Pay Rule	Std Pay	Timecards
ZUMRDANO1 CADLOS	TMD1	7Test Thomas	01902	Harttard MED	11000 728 2010 2110 (20)	Period Hours	Scheduler-CMHC
20MBRANOT, CAREOS	TMD11	Zitest montas	31002	HIMAN RESOURCES		40.0	Staffing-CMHC
ZUMBRANO13 CABLOS	TMP13	Test Super A	51010	Test Dent A	VOLUNTEERS	40.0	Reports
ZUMBRAN014 CABLOS	TMP14	Test Super A	31010	HUMAN RESOURCES	FACULTY NON-EXEMPT	0.0	
ZUMBRAN015, CABLOS	000015	Test Super A	31010	HUMAN RESOURCES	UHP ET 8HB 24X7 PH	0.0	Exceptions
ZUMBRAN016, CARLOS	TMP16	Test Super A	A	Test Dept A	1199 NP-6 72&80HR -8HR (3P)	0.0	Group Edit Results
ZUMBRAN017, CARLOS	TMP17	Test Super A	31010	HUMAN RESOURCES	NP-3 FULL TIME {1HR MEAL}	0.0	
ZUMBRAN019, CARLOS	000019	Test Super A	31010	HUMAN RESOURCES	1199 NP-6 72&80HB -8HB (3P)	0.0	CMHC CMHC
ZUMBRAN02, CARLOS	TMP2	Test Super A	31010	HUMAN RESOURCES	NP-2 75HR	0.0	Workload Planner
ZUMBRAN03, CARLOS	TMP3	Test Super A	31010	HUMAN RESOURCES	NP-3N 24-7 MONITOR TECH	0.0	
ZUMBRAN04, CARLOS	TMP4	Test Super A	31010	HUMAN RESOURCES	1199 12HR CMHC	0.0	My Timecard
ZUMBRAN05, CARLOS	TMP5	Test Super A	31010	HUMAN RESOURCES	UHP 9HR	0.0	Help
ZUMBRANO6, CARLOS	TMP6	Test Super A	31010	HUMAN RESOURCES	NP-2 75HR NO DIFF	0.0	
					1100 ND C 700 00 ND (0D)		

3. Click GoTo button and then Scheduler-CMHC

KRONOS Carl ZTE Sign Out	est2 t	ł	2)			Vorkspaces 🗸 🔎
🕈 Manage My Department								
Genies		_					⊡ ‡	**
My Employees	<u>୍</u>				Loaded 11	:11AM Current Pay Pe	riod 🗸 😳	Ŵ
Select All Column Filter Per	ople Timekeeping	Approval				• 1 Colored	Share Go To	Genies Timecards
Name 🔺	Employee ID	Manager	Dept	Dept Name	Pa	Current Pay Period		Scheduler-CMHC
ZUMBRANO1, CARLOS	TMP1	ZTest.Thomas	91802	Hartford-MED	1199C 72&80HB -8F	✓ Go to widget		Scheduler-Critic
ZUMBRAN011, CARLOS	TMP11	Test Super A	31010	HUMAN RESOURCES	UHP PT 8HR	Timecards		Staffing-CMHC
ZUMBRAN013, CARLOS	TMP13	Test Super A	А	Test Dept A	VOLUNTEERS	Scheduler-CMHC		Reports
ZUMBRAN014, CARLOS	TMP14	Test Super A	31010	HUMAN RESOURCES	FACULTY NON-EXEL	Reports		
ZUMBRAN015, CARLOS	000015	Test Super A	31010	HUMAN RESOURCES	UHP FT 8HR 24X7 F	Exceptions		Exceptions
ZUMBRAN016, CARLOS	TMP16	Test Super A	Α	Test Dept A	1199 NP-6 72&80HF	Audits		Group Edit Results
ZUMBRAN017, CARLOS	TMP17	Test Super A	31010	HUMAN RESOURCES	NP-3 FULL TIME {1F	Go to workspace		Calendar Leave Summary
ZUMBRAN019, CARLOS	000019	Test Super A	31010	HUMAN RESOURCES	1199 NP-6 72&80HR	-8HR (3P)	0.0	CMHC
ZUMBRAN02, CARLOS	TMP2	Test Super A	31010	HUMAN RESOURCES	NP-2 75HR		0.0	Workload Planner
ZUMBRAN03, CARLOS	тмрз	Test Super A	31010	HUMAN RESOURCES	NP-3N 24-7 MONITO	R TECH	0.0	My Timecard
ZUMBRANO4, CARLOS	TMP4	Test Super A	31010	HUMAN RESOURCES	1199 12HR CMHC		0.0	
ZUMBRAN05, CARLOS	TMP5	Test Super A	31010	HUMAN RESOURCES	UHP 9HR		0.0	Help
ZUMBRANO6, CARLOS	TMP6	Test Super A	31010	HUMAN RESOURCES	NP-2 75HR NO DIFF		0.0	
ZUMBRAN07, CARLOS	TMP7	Test Super A	31010	HUMAN RESOURCES	1199 NP-6 72&80HR	-8HR (3P)	0.0	

4. Click on Employee name, so highlighted in light blue. (as seen below)

KRONOS Carl ZTest2. Sign Out	52	9			Workspaces	2
Manage My Department Scheduler-CM	HC 55 X					
Scheduler-CMHC						□ ‡
			Loaded: 11:19AM 1/19/2018 - 2/01/2	018 💌 📰	1 Employee(s) Selected	Edit
J A□□□ Column View Column Visibility Selection Select all	Gentt View Sorting Tools Engine	es		Refresh	View Share	Save Go To
By Employee	1/14 - 1/20		1/21 - 1/27		1/28 - 2/03	
Name dob nite Bost Sch	Fri 1/19 Sat 1/20	Sun 1/21 Mon 1/22	Tue 1/23 Wed 1/24	Thu 1/25	Fri 1/26	Sat 1/27
ZUMBRAN NUR HART 80.00 1	p-7a	11p-7a	llp-7a llp-7a	11p-7a	11p-7a	

5. Right Click on Employee name and then click Schedule Pattern. (as seen below)

KRONOS	Carl ZTest2 Sign Out	52	947 () [2]		• Work	spaces •
A Manage My De	partment Scheduler-CMH	C (5) X				
Scheduler-CMHC						
			Loade	d: 11:22AM 1/19/2018 - 2/01/2018	T Employee	e(s) Selected 💌 Edit
Quick Actions	Column Visibility Select all	Gantt View Sorting Tools Engines			Refresh View Comments	Share Save Go To
By	/ Employee	1/14 - 1/20		1/21 - 1/27	1/2	8 - 2/03
Name Job	Title Dent Sch	Fri 1/19 Sat 1/20	Sun 1/21 Mo	on 1/22 Tue 1/23	Wed 1/24	Thu 1/25
	HART 80.00 1	1p-7a	11p-7a	11p-7a	11p-7a	11p-7a 11
III Scher	dule Pattern	1				
Add a	shife					
Add F	Pay Code					
E View	Accruals					
View	Schedule Outline					

6. Click Add Pattern. (as seen below)

Name	By	/ Empl	oyee Dept	Sci	Sch	edu	ile Pattern				- ×) 1/28 d 1/24	- 2/03 Thu 1/25	
ZUMBRAN	NUR		HART	80.	Assig ZU	jned to MBR/	o ANO1, CARLOS Prin	nary job [Organizatio	n/UCHC/CMHC/FU8/F	IARTFORD-MED/NUR]			11p-7a	11
							Start Date	End Date	Duration	Rotation				
					Ø	×	3/22/2013	Forever	1 week	1 Week:11p - 7a(Mon,Tue,Wed,Thu,Fri)				
			<		A	dd Pa	attern	\geq		Ok				
							Add Pattern	1			_			

7. Brings you to the Pattern Editor Screen. (as seen below)

ZUN	ied to IBRAN	101, CA	RLOS Prin	ary job	[Organizatio	n/UCHC/CMHC/FI	U8/HA	RTFORD-ME	D/NUR]		
	ę	Start Da	te	End Dat	e	Duration	1	Rotation			
0	×	3/22/20	13	Forever		1 week		1 Week:11p ·	7a(Mon,Tue,We	d,Thu,Fri)	
Define	Detter	n for: t	3/2018		Start Date.	1/19/2018		Lilu Date	Forever	Clear	
Define Add SI	Patten	n for: * Add Pay	1 (Code S	Week(s)) O Day(s) plate - Pa	attern Template			Forever Items	Clear Clear Over	ride Other Patterr
Define Add SI	Patten	n for: * Add Pay No.	1 © (Code S Sunday	Week(s)) O Day(s) plate - Pa Monday	attern Template	•	ednesday	Forever Items Thursday	in rotation	ride Other Pattern Find Saturday
Define Add SI	Patten	Add Pay No.	1 Code I S	Week(s)) O Day(s) plate - Pa Monday	attern Template	•	ednesday	Forever Items Thursday	in rotation	ride Other Pattern Find Saturday

8. Enter the **Start Date** first (*NOT the Anchor Date*) (as seen below). Example Friday 1/19/2018 *****Always choose the Friday that the Bi-Weekly Pay Period begins on.**

Note: if the pay period begin Friday you choose is not with your specified Kronos Time Period, then you will not be able to save the pattern. You will need to change your specified time period that includes your start date.

	NO1, CARLOS F	rimary job (Organiz	ation/UCH	C/CMI	HC/FU	18/HA	RTFO	RD-M	ED/NI	JR]		
	Start Date	End Date	Durat	ion		1	Rotatio	on				
ØX	3/22/2013	Forever	1 wee	ek.			1 Wee	k:11p	- 7a(I	/lon,Tue,Wed,	Thu,Fri)	
	Add Day Cada	Shift Template	31 Par _	1	2	3	4	5 12	6 13	Items i	n rotation	Find
Add Shift	Add Pay Code	onine rempineer v	7	0		10						
Add Shift	No. Sun	day Monday	14	15	16	17	18	19	20	Thursday	Friday	Saturday
Add Shift	No. Sun	day Monday	7 14 21	15 22	16 23	17 24	18 25	19 26	20 27	'hursday	Friday	Saturday

9. Enter the **Anchor Date** (as seen below)

*****Choose the Sunday** *before* **the Start Date** you selected in the prior step, for our example it would be Sunday 1/14/2010.

Add Pattern Anchor Date: 1/	ate 013 14/2018		End	Date ever			Duration 1 week	Rotation	7a(Mon,Tue,W	ed,Thu,Fri)	
Add Pattern Anchor Date:* 1/	14/2018		Fore	ever			1 week	1 Week:11p	7a(Mon,Tue,W	ed,Thu,Fri)	
Add Pattern Anchor Date:* 1/	14/2018										
Define Pattern f 3 Add Shift Ad	1 1	2	3 10	4	5	6 13	ttern Template 👻		Item	Over	ride Other Patterns
1	4 15	16	17	18	19	20	Tuesday	Wednesday	Thursday	Friday	Saturday
+ x 2	1 22	23	24	25	26	27					
			~ 1	1	2	3					

10. If the employee already has a schedule assigned to them, Check **Override Other Patterns** (this will replace the old schedule pattern and with the new schedule pattern).

Schedule Pattern						
Warning Selecting Override	may delete shifts or	unavailable days, ex	cept for locked	l days or shifts.		×
Assigned to ZUMBRANO1, CARLOS Pr	imary job [Organizati	on/UCHC/CMHC/FU8	HARTFORD-ME	D/NUR]		
Start Date	End Date	Duration	Rotation			
✓ x 3/22/2013	Forever	1 week	1 Week:11p -	7a(Mon,Tue,Wed	,Thu,Fri)	
Add Pattern Anchor Date:* 1/14/2018 Define Pattern for: * 1	Start Date:*)	End Date	• Forever	Clear	ride Other Patterns
Add Shift Add Pay Code	Shift Template 👻 F	Pattern Template 🔻		Items i	n rotation	▼ Find
No. Sund	ay Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

11. If the schedule is a **2-week rotating pattern** then click the + icon to add a 2nd row as seen below. (as seen below)

1-week pattern - same scheduled days every week–ONLY 1 row needed **2-week pattern** – week1(Fri-Thru) and week2(Fri-Thru) have different scheduled days. – 2 rows need.



12. <u>SCHEDULE EXAMPLE – 2 Week Rotating Pattern Steps</u>

Zumbrano1 Schedule: 8am - 4pm

Week1 Schedule: Friday, Monday, Tuesday, Wednesday, Thursday Week2 Schedule: Saturday, Sunday, Monday, Wednesday, Thursday

Step 1: Click on the day box the schedule starts (Example above is a Friday, so click in Friday Box on the First Row(day box labeled #1).

***If the schedule starts on *Sunday* then you would choose the Sunday box on the *second* row (not labeled with a number in example below).

***Choose the day box that the Scheduled Start Time falls on, *NOT* the end time (example start time above is 8am).

Step 2: Press and Hold down the **Control(Ctrl) key** and select the appropriate boxes. For this Example, click the boxes in the **Numbered order** as seen below. So, you have to go to the Right, Down, and Around.

ssigned t ZUMBR	to ANO1, CARL	.OS Prin	a ry job [Organiz	zation/UCHC/CMHC/F	U8/HARTFORD-ME	D/NUR]		
	Start Date		End Date	Duration	Rotation			
ØX	3/22/2013		Forever	1 week	1 Week:11p -	7a(Mon,Tue,Wed	,Thu,Fri)	
Anchor Da	tern for: * 2	018	Start Da	ite:* 1/19/2018	End Date	• Forever	Clear	-: 1. Orb D
unchor Da Define Pat udd Shift	te:* 1/14/2 tern for: * 2 Add Pay Co	018 . •	₩eek(s) ○ Da	ay(s)	End Date	• Forever	Clear Over	rride Other Pattern:
anchor Da Define Pat	te:* 1/14/2 tern for: * 2 Add Pay Co No.	018 • • • ode s Sunday	IIII Start Da Week(s) ○ Da lift Template マ Monday	tte:* 1/19/2018 ay(s) Pattern Template y Tuesday	End Date Wednesday	• Forever	Clear Clear Over n rotation Friday	rride Other Pattern: Find Saturday
Anchor Da Define Pat Add Shift	te:* 1/14/2 tern for: * 2 Add Pay Co No. < 1	018 • • ode s Sunday 7	Start Da Week(s) O Da hift Template ~ Monday	tte:* 1/19/2018 ay(s) Pattern Template y Tuesday	End Date	• Forever	Clear Clear Over n rotation Friday	rride Other Pattern: Find Saturday

Step 3: Click **Shift Template** and then scroll to click on the appropriate **Shift Code** or type in the search.. box then click on the shift code. (For Example, HP is 8a-4p.)

Assigned to ZUMBRANO1, CARLOS PI	imary job [Organiz	zation/UCHC/CMHC/FU	8/HARTFORD-MED/NUR]
Start Date	End Date	Duration	Rotation
3/22/2013	Forever	1 week	1 Week:11p - 7a(Mon,Tue,Wed,Thu,Fri)
	Start Da	ne. [1/19/2018	End Date: Forever Forever
Define Pattern for: * 2	Week(s) De Shift Template	ay(s)	Clear Forever Creat Override Other Patte Items in rotation Fin
Define Pattern for: * 2 Add Shift Add Pay Cole	Week(s) O De Shift Template Search Name	ay(s)	Clear Clear Forever Clear Fin Fin Fin Fin Fin Fin Fin Fi
Define Pattern for: * 2 Add Shift Add Pay Cote	Week(s) De Shift Template Search Name H03	ay(s) Pattern Template - Description 8308-330p	Clear Clear Forever Clear Clear Fin Clear Fin Clear Fin Clear Fin Clear
Define Pattern for: * 2 Add Shift Add Pay Core	Week(s) De Shift Template Search Name H03 HP	Pattern Template Pescription 8308-330p 8a-4p	Clear Clear Forever Coverride Other Patte Items in rotation Fin Thursday Friday Saturday
Define Pattern for: * 2 Add Shift Add Pay Core No. Sund + X 1 + X 2	Week(s) De Shift Template Search Name H03 HP HPESOS HP-MAND	Pattern Template Pescription 8308-330p 8a-4p 8a-4p ESOS 8a-4n MAND	Clear Clear Clear Cl
Define Pattern for: * 2 Add Shift Add Pay Core No. Sund + X 1 + X 2	Week(s) De Shift Template Search Search Name H03 HP HPESOS HP-MAND HP-VOT	ay(s) Pattern Template → Description 8308-330p 8a-4p 8a-4p ESOS 8a-4p MAND 8a-4p VOT	Clear C

Schedule Pattern populates with the selected HP (8a-4p) shifts, as seen below. *For an example, of a 1-week Monday - Friday, HP (8a-4p) pattern, see bottom of **page 7**.

ZUN	IBRAN	01, CA	RLOS Prima	r y job [Organizatio	n/UCHC/CMHC/FL	U8/HARTFORD-ME	D/NUR]		
	S	Start Dat	e E	ind Date	Duration	Rotation			
9	×	3/22/201	13 F	orever	1 week	1 Week:11p -	7a(Mon,Tue,Wed	,Thu,Fri)	
Define	Patter	1/14	2 0 1	Start Date:*	1/19/2018	End Date	• Forever	Clear	ride Other Patterns
Define Add St	Patterr	n for: *	2 Code Shirt	Start Date:* Veek(s) O Day(s t Template - E	1/19/2018	End Date	•:* Forever	Clear	ride Other Patterns
Define Add St	Pattern lift /	n for: * Add Pay No.	2 Code Shift	Start Date:* Veek(s) O Day(s t Template - E Monday	1/19/2018	End Date	e:* Forever <u>8a-4p</u> Thursday	Clear	ride Other Patterns Find Saturday
Define Add St	Pattern iift /	Add Pay No.	2 Code Shirt Sunday 88-4p	Start Date:* Veek(s) O Day(s Template - E Monday 8a-4p	1/19/2018	Wednesday 8a-4p	e:* Forever <u>8a-4p</u> Thursday 8a-4p	Friday 8a-4p	ride Other Patterns

Step 4: Click Apply

ssigne ZUME	d to BRA	NO1, CAI	RLOS Prim	a ry job [Organizati	ion/UCHC/CMHC/FU	J8/HARTFORD-ME	D/NUR]		
		Start Dat	e	End Date	Duration	Rotation			
0	×	3/22/20	13	Forever	1 week	1 Week:11p	7a(Mon,Tue,Wed	,Thu,Fri)	
nchor I	Date	:* 1/14	/2018	Start Date:	1/19/2018	End Date	e:* 🚺 🖲 Forever	Clear	ride Online Detterne
nchor I efine P dd Shif	Date Patte	m for: *	2 (e) Code Sh	₩eek(s) ○ Day(sift Template →	* 1/19/2018 s) Pattern Template •	End Date	• Forever	Clear Clear	rride Other Patterns
nchor I efine P dd Shif	Date Patte	n for: * Add Pay	2 Code Sh	m Start Date: Week(s) ○ Day(a ift Template マ Monday	• 1/19/2018 s) Pattern Template • Tuesday	End Date	e:* Forever Items i Thursday	Clear Clear N Over n rotation Friday	rride Other Patterns
nchor l efine P dd Shit	Patte	the for: * Add Pay No. 1	2 Code Sh Sunday 8a-4p	Start Date: Week(s) ○ Day(: ift Template ▼ Monday 8a-4p	* 1/19/2018 s) Pattern Template • Tuesday	Wednesday 8a-4p	•:* • Forever Items i Thursday 8a-4p	Clear Cover n rotation Friday 8a-4p	rride Other Patterns

Assigne ZUME	ito RANO1,CARLOS Pi	rimary job [Organization/UCHC/CMHC/FU8/HARTFORD-MED/NUR]	
	Start Date	Find Date Duration Rotation	x
9	x 3/22/2013	Confirm	
Add Pat	tern	Selecting Override may delete shifts or unavailable days, except for locked days or shifts. Do you want to continue?	Class

Step 6: Click OK

Sch	nedu	ıle Pattern			
Assig ZU	jned t MBR/	ANO1, CARLOS	Primary job (Organiz	zation/UCHC/CMHC/	FU8/HARTFORD-MED/NUR]
		Start Date	End Date	Duration	Botation
0	×	Start Date	End Date	Duration 2 weeks	Rotation 2 Weeks:8a - 4p(Sun,Mon,Wed,Thu,Fri,Mon,Tue,Wed,Thu,Sat)

Step 9: Verify the schedule was entered correctly before pressing Save.Click Save if correct. If incorrect, click Refresh to start over Or you can edit the pattern you just created by going to the next page.

KRON	NOS	Carl ZTest Sign Out	2			2 2		0		;		Workspaces	٩
A Manage I cheduler-CM	My Departr IHC	ment S	cheduler-Cl	4HC 5	x								Ξ
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*You have completed the steps for adding a 2 week schedule pattern.

Editing a Schedule Pattern

(NOTE: Never edit a schedule pattern created in the past!!!)

Before or After Saving, if you need to Edit your pattern you just entered.

1. Right click on employee's name and click Schedule Pattern

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Schedule Pattern				
Add Pay Code				
View Accruals				
View Schedule Outline				

2. Click the Pencil icon and then edit schedule pattern as needed.

Schedul	e Pattern			
ssigned to ZUMBRAI	NO1, CARLOS Prim	1 ary job [Organizatior	1/UCHC/CMHC/FU8/H	IARTFORD-MED/NUR]
	Start Date	End Date	Duration	Rotation
Ø X	1/19/2018	Forever	2 weeks	2 Weeks:8a - 4p(Sun,Mon,Wed,Thu,Fri,Mon,Tue,Wed,Thu,Sat)

<u>Schedule Example -</u> 1 Week Rotating Pattern

Example A: Standard Monday thru Friday HP (8a-4p) pattern.

Start Date = 1/19/2018 (Friday, beginning of a pay period)

Anchor Date = 1/14/2018 (Sunday, prior to Work Start Date)

Day Boxes Grid = 1 Row Needed for Monday thru Friday Day boxes, because this schedule is only a 1-week repeating pattern.

ZUMBR	ANO1, CARLOS	Primary job [Organiza	ation/UCHC/CMHC/FL	J8/HARTFORD-ME	D/NUR]						
	Start Date End Date Duration Rotation										
Ø X	1/19/2018	Forever	2 weeks	2 Weeks:8a - 4p(Sun,Mon,Wed,Thu,Fri,Mon,Tue,Wed,Thu,Sat)							
Define Pattern for: * 1											
	Add Shift Add Pay Code Shift Template 👻 Pattern Template 👻 8a-4p 💌 Find										
dd Shift	Add Pay Code										
dd Shift	No. Su	nday Monday	Tuesday	Wednesday	Thursday	Friday	Saturday				

SHIFT CODE LEGEND

TIME	NAME		TIME	NAME		HOUR	NAME				
1:00 AM	Α		1:00 PM	М		:15	1				
2:00 AM	В		2:00 PM	Ν		:30	3				
3:00 AM	С		3:00 PM	0		:45	4				
4:00 AM	D		4:00 PM	Р							
5:00 AM	Е		5:00 PM	Q							
6:00 AM	F		6:00 PM	R							
7:00 AM	G		7:00 PM	S							
8:00 AM	Н		8:00 PM	Т							
9:00 AM	I		9:00 PM	U							
10:00 AM	J		10:00 PM	V							
11:00 AM	K		11:00 PM	W							
12:00 PM	L		12:00 AM	Х							
Examples											
	Shift			Shift							
Shift	Name		Shift	Name							
7a-3p	GO		715a-315p	G 1 01							
8a-4p	HP		7a-330p	GO <mark>3</mark>							
830a-430p	H3P3										
***If you are unable to find a Shift Name in your Shift view, please contact											
Brian Kleinhen(x4061) or Ken Lowell(x2427) to add to your Shift profile.											