MANAGING BASIC SCHEDULES COURSE
CONTENTS

MANAGING BASIC SCHEDULES COURSE ........................................................................................................ 1

MODULE 1: COURSE ESSENTIALS ..................................................................................................................... 5
  About this Course ................................................................................................................................. 6
  Course Callouts ..................................................................................................................................... 6

MODULE 2: NAVIGATING KRONOS .................................................................................................................... 7
  Logging Onto Kronos ............................................................................................................................ 8
  Signing Out .............................................................................................................................................. 9
  Navigating Kronos Pages ...................................................................................................................... 10
  The Key Areas of Navigator ................................................................................................................ 10
  Navigating the Active Workspace ..................................................................................................... 11
  Activating a Widget ............................................................................................................................. 13

MODULE 3: SEARCHING FOR INFORMATION ................................................................................................ 14
  Searching for Employee Information Using the Search Widget .............................................................. 15
  Using the GoTo Navigation ................................................................................................................ 16
  Accessing Multiple Timecards Using GoTo Navigation .................................................................. 18
  GoTo Navigation Overview ................................................................................................................ 19
  Accessing Kronos Genies .................................................................................................................. 19
  The Genies Widget ............................................................................................................................ 19
  Using Kronos Genies .......................................................................................................................... 20
  Sorting and Grouping Data .................................................................................................................. 21
  Refreshing Genie Data .......................................................................................................................... 21
  Filtering within a Genie ....................................................................................................................... 21
  Customizing Columns within Genies ................................................................................................. 23

MODULE 4: SCHEDULING OVERVIEW ............................................................................................................ 24
  Scheduling Overview ............................................................................................................................ 25
  Accessing the Schedules Widget ........................................................................................................ 25
  Schedules Widget Overview ............................................................................................................... 26
  Context Selectors .................................................................................................................................. 27
  Toolbar ................................................................................................................................................... 28
  Schedule Workspace ........................................................................................................................... 29

MODULE 5: WORKING WITH SCHEDULE GROUPS ........................................................................................... 31
  Working with Schedule Groups .......................................................................................................... 32
Managing Basic Schedules

**MODULE 6: WORKING WITH SCHEDULE PATTERNS** ................................................................. 35

- Schedule Pattern overview .................................................................................................. 36
- Assigning a Pattern Template ............................................................................................... 36
- Creating a Schedule Pattern without a Template ................................................................. 38
- Deleting a Pattern from a Schedule .................................................................................... 41
- Learning Scenario .................................................................................................................. 41

**MODULE 7: WORKING WITH SHIFTS** .............................................................................. 43

- Adding Shifts ......................................................................................................................... 44
- Inserting a Shift Template ...................................................................................................... 44
- Deleting Shifts ......................................................................................................................... 45
- Scheduling a Pay Code Amount ............................................................................................ 46
- Transfers Overview ................................................................................................................ 49
- Scheduling Labor Account Transfers ................................................................................... 49
- Scheduling Work Rule Transfers ........................................................................................... 51
Managing Basic Schedules
MODULE 1: COURSE ESSENTIALS

MODULE OBJECTIVES:

- Describe the content within the instructor-led course.
- Discuss the format of this course.
- Understand the layout of the reference guide.
Managing Basic Schedules

ABOUT THIS COURSE

The instructor-led course is delivered in several short modules. The content of the course is delivered in the same order in which you perform your daily and pay period tasks. As you proceed through the course, the Facilitator explains the concepts of each task and then guides you through hands-on practice exercises.

COURSE CALLOUTS

Certain elements of the Kronos Timekeeping application require special attention. The course identifies those elements by using one of the callouts displayed below.

WARNING
The warning callout identifies potential problems or issues to consider.

POLICY
The business policy callout outlines specific policies that need to be followed for specific tasks.

ADDITIONAL INFORMATION
The additional information callout provides helpful hints regarding certain tasks.
MODULE 2: NAVIGATING KRONOS

MODULE OBJECTIVES:

- Log on and sign out of Kronos
- Identify the components of Navigator.
- Navigate widgets, wizards and genies
LOGGING ONTO KRONOS

The Kronos application includes functional components that provide access to review and manage your employees time and attendance data.

LEARNING SCENARIO

Log on to the Kronos application to monitor employee time and attendance data.

LOG ONTO KRONOS

1. Once logged onto your PC, open a web browser.

2. Go to https://soin.kronos.net/.

3. Enter your PS User ID and Network password in their designated fields.

4. Click the Log On button or press Enter on the keyboard.

WARNING

Usernames and passwords are case sensitive.
POLICY
If you forget your username or password, click the Reset Password link and answer the security questions.

SIGNING OUT
The Kronos application includes confidential employee information. It is important to keep the information secure by correctly signing out of the application.

LEARNING SCENARIO
You have completed your daily tasks and want to close the Kronos application.

SIGN OUT
1  Click the Sign Out link.
   
   ![Sign Out Link]

2  Click the ‘X’ to close the browser window.
   
   ![Close Browser Window]

WARNING
Closing Kronos with the Close (X) button only closes your view of the application. The connection to the database remains active which could allow unauthorized people access to employee information.
Managing Basic Schedules

**NAVIGATING KRONOS PAGES**

Kronos uses role-based views that include functionality and tasks specific to each user type. The content and components contained on the page vary and are based on the user’s role within the application. The page that displays after you log on is called the Navigator. The Navigator provides quick and easy access to the tasks you perform on a regular basis.

**THE KEY AREAS OF NAVIGATOR**

The Navigator page contains many different parts. Each part of a navigator displays information or provides tools to perform a task.
### Element Description

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workspace Tabs</strong></td>
<td>Each active workspace is identified with a tab. Switch between workspaces by selecting the tab you want to view. Access additional workspaces to which you have access using the plus (+) sign.</td>
</tr>
<tr>
<td><strong>Alerts</strong></td>
<td>Displays actionable items that require your immediate attention. The numeric value identifies the number of alerts that currently exist.</td>
</tr>
<tr>
<td><strong>Name &amp; Sign Out</strong></td>
<td>Identifies the user and provides a link to log out of Kronos.</td>
</tr>
<tr>
<td><strong>Primary Workspace</strong></td>
<td>Contains detailed information regarding the active task on which you are working. The tab shown at the top of the workspace identifies what is selected. You use features within the workspace to find, view, add, and modify information.</td>
</tr>
<tr>
<td><strong>Related Items Pane</strong></td>
<td>Inactive widgets, wizards and genies are located on the right side of the primary workspace in the Related Items pane. An inactive item can easily be opened at any time by clicking the item from within the list.</td>
</tr>
</tbody>
</table>

### NAVIGATING THE ACTIVE WORKSPACE

Widgets are tools used to access specific Kronos information or tasks. Widgets contain different types of functionality depending on the task you are trying to accomplish. When a widget is activated, the workspace updates to include information and functionality specific to the widget. Each active workspace gets its own tab. You can switch back and forth between workspaces by selecting the tab you want to view. Inactive widgets, wizards and genies are located on the right side of the workspace in the Related Items pane. An inactive item can easily be opened at any time by clicking the item from within the list.
### Managing Basic Schedules

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>Reloads the workspace with its default information.</td>
</tr>
<tr>
<td>Maximize &amp; Restore</td>
<td>Maximizes the active workspace. Click the maximize button a second time to return to the normal screen view, this enables you to view any other inactive widgets.</td>
</tr>
<tr>
<td>Gear Icon</td>
<td>A drop-down menu provides options to move the widget. Unavailable options are greyed out.</td>
</tr>
<tr>
<td>- Pop-out</td>
<td>Promotes a secondary widget to the primary position.</td>
</tr>
<tr>
<td>- Close</td>
<td>Closes the secondary widget and lists it back on the Related Items pane.</td>
</tr>
<tr>
<td>Resize Arrow</td>
<td>Minimizes the Related Items pane. Click the arrow a second time to open the Related Items pane.</td>
</tr>
</tbody>
</table>
ACTIVATING A WIDGET

To change the information displayed in the active workspace you must move an inactive widget into the primary view. To activate a widget, click on a widget in the Related Items pane to open the widget in a separate workspace tab.
MODULE 3: SEARCHING FOR INFORMATION

MODULE OBJECTIVES:

• Search for employee information using the Search widget.
• Search for employee information using GoTo Navigation.
• Access employee data using Kronos genies.
SEARCHING FOR EMPLOYEE INFORMATION USING THE SEARCH WIDGET

The Search widget allows you to quickly locate information about employees in Kronos. In addition, Kronos evaluates your search text and offers suggestions that are possible matches for the information you are seeking. Once you locate the employee or information, you can drill down to a deeper level of information.

LEARNING SCENARIO

Use the Search widget to locate and review an employee’s pay rule assignment.

SEARCH AND LOCATE EMPLOYEE INFORMATION

1. Click the Search icon located to the right of the Workspaces tab.

2. If desired, activate the Hints functionality if you want Search to offer potential categories for your search.

3. From the Search field, enter at least the first three letters of the employee’s first or last name.

4. Click a Suggestion entry to display more information in the Results pane.

WARNING

If the Search field does not allow any entries, click the (X) to clear the field and enter new search criteria.
**USING THE GOTO NAVIGATION**

You can select one or more employees from a widget and navigate to another Kronos workspace where you can perform an action or review the information in more detail.

**LEARNING SCENARIO**

You want to review your employee’s timecard. Use the GoTo link to access his timecard.

**USE THE GOTO NAVIGATION**

1. Click an employee name from within a genie.

   ![Reconcile Timecard](image)

   - Name: Tester, Salary
   - Unexcused Absence: ✓
   - Missed In-P...

2. Click the GoTo icon in the upper-right corner.

   ![GoTo icon]
Managing Basic Schedules

**USE THE GoTo NAVIGATION**

3  Select a widget or workspace from the list.

4  The selection displays in the active workspace.
ACCESSING MULTIPLE TIMECARDS USING GOTO NAVIGATION

Facilitator: From a Kronos genie, you can quickly access multiple employees’ timecards. Only one timecard displays at a time, but it is easy to navigate from one employee’s timecard to another using the navigation arrows in the timecard header. There are different methods available to select employees within a genie:

1. Hold the Ctrl key and click employee names.
2. Click an employee’s name, hold the Shift key, and click the last employee’s name in the range.
3. Click Select All Row from the toolbar.
Managing Basic Schedules

**GOTO NAVIGATION OVERVIEW**

After selecting one or more employees from within a widget, you can use GoTo navigation to access the employee’s timecard, schedule, or other widgets where you can perform an action. Or select from the Go to workspace list to open a different workspace.

**ACCESSING KRONOS GENIES**

**THE GENIES WIDGET**

The Genies widget provides convenient access to genies within your workspace. All of the genies that you have access to can be found in the Genies widget. Click the Reconcile Timecard drop-down arrow to select a different genie.
USING KRONOS GENIES

A genie is a summary view that organizes information according to common tasks you perform on a regular basis. Each genie contains a toolbar with access to perform different tasks specific to the genie selected. From a genie you can:

- Review summarized information for analysis
- Locate employees and access their timecards
- Generate reports for one or more employees
- Export genie data to a Microsoft Excel spreadsheet

Element | Description
--- | ---
Genie Name | Displays the name of the active genie.
Toolbar | The Toolbar contains action buttons that provide quick access to filters and processes in the genie.
Context Selectors | **Time Period:** Allows you to determine the timeframe you want to view, such as the current pay period, or a particular timeframe in the past/future. The time period you select determines what you see in the workspace.

**Show Field:** Determines which employees display in the workspace. All Home includes all employees that report to you.
Managing Basic Schedules

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Totals</td>
<td>Displays the total employees or hours for each column, based on the time period and show selections.</td>
</tr>
</tbody>
</table>

**SORTING AND GROUPING DATA**

You can sort columns of information in a genie by clicking a column header. Select from the listed options to sort or group the data within the column.

![Image of sorting options]

**REFRESHING GENIE DATA**

Click the Refresh icon to display the most current information in a genie.

![Image of refresh button]

**FILTERING WITHIN A GENIE**

Use the filter function to narrow down the number of employees you are viewing within a genie.

After clicking the Filter icon, filter fields display at the top of any columns that can be filtered. As you type in any of these filter fields, only rows containing the characters you type remain in the workspace.
Managing Basic Schedules

<table>
<thead>
<tr>
<th>Name</th>
<th>Unexcused Absence</th>
<th>Missed In-Punch</th>
<th>Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tester, Salary</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tester, Payroll</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tester, Employee</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Tester2, Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tester1, Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tester, Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CUSTOMIZING COLUMNS WITHIN GENIES

Use the Column Selection function to show or hide columns within a genie. After clicking the Column Selection icon, check or uncheck the boxes which correspond to the column headings, to add or remove a column from the genie.
MODULE 4: SCHEDULING
OVERVIEW

MODULE OBJECTIVES:

- Explain the importance of reviewing employee schedules.
- Access the Schedules widget.
- Navigate the Schedules widget.
MANAGING BASIC SCHEDULES

SCHEDULING OVERVIEW

Employee scheduling is an important aspect to the overall workforce management process. Scheduling provides additional functionality within the Kronos application including: exception tracking, restriction enforcement, and the ability to schedule time off and transfers in advance.

ADDITIONAL INFORMATION

This course focuses only on Basic Schedules.

ACCESSING THE SCHEDULES WIDGET

The Schedules widget is a tool within Kronos used to review employee schedules.

LEARNING SCENARIO

You need to open the Schedules widget to access and review your employee schedule assignments.

ACCESS THE SCHEDULES WIDGET

1. From the Related Items pane, click the Schedules widget.

2. Review the information within the Schedules widget.
Managing Basic Schedules

SCHEDULES WIDGET OVERVIEW

The Schedules widget is used to view both worked and non-worked time for your employees. The Schedules widget displays schedules in columns and rows by employee name and date. The Schedules widget has three main areas, the Toolbar, Employee and Date Selector, and Schedule Workspace. Each is discussed below.

Element | Description
--- | ---
Toolbar | Contains all the tools for viewing and maintaining schedules.

**Employee & Date Selector**: display schedules for the current or next schedule, or for a specific date or range of dates.

**Location Selector**: view schedules for all employees to whom you have access, or you can select employees in a specific location, or who work specific jobs within a location.

Context Selectors

Indicators | Displays schedule totals for coverage and metrics.

Schedule Workspace | Displays each employee’s scheduled shift times or shift labels for the dates selected in the Time Period field.
The Context Selectors allow you to determine which of your employees display within the schedule grid and for what date range. You can change the group of employees or date by selecting a different option in the Time Period and Show fields.

### Element Description

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time Period Field</strong></td>
<td>Allows you to determine the timeframe you want to view, such as the current schedule period or a next schedule period. The time period you select determines what you see in the workspace.</td>
</tr>
<tr>
<td><strong>Calendar Button</strong></td>
<td>The Calendar button allows you to select a specific date(s) to display.</td>
</tr>
<tr>
<td><strong>Show Field</strong></td>
<td>Allows you to determine which group of employees display in the Schedules widget workspace.</td>
</tr>
</tbody>
</table>
### TOOLBAR

The Toolbar of the Schedules widget contains the following components:

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Actions</td>
<td>Click the Quick Actions button to open icons to help you streamline schedule tasks.</td>
</tr>
<tr>
<td>View</td>
<td>You can view employee schedule data using either of two different views:</td>
</tr>
<tr>
<td></td>
<td>- <strong>By Employee</strong> - displays an alphabetical list of employees by name. Includes their daily schedule for the timeframe selected.</td>
</tr>
<tr>
<td></td>
<td>- <strong>By Group</strong> – displays employees under their schedule group assignment. If an employee is not assigned to a group, they display under the “Ungrouped Employees” category at the top of the workspace.</td>
</tr>
<tr>
<td>Column Selection</td>
<td>Allows you to customize the columns within the Schedules widget by showing or hiding specific columns.</td>
</tr>
<tr>
<td>Visibility Filter</td>
<td>Allows you to show or hide information within the schedule grid. You can display or hide items like shift times, pay code names, accrual names, assigned shifts, pay codes, scheduled accrual amounts, and holidays.</td>
</tr>
<tr>
<td>Select All</td>
<td>Selects all employees in the workspace.</td>
</tr>
<tr>
<td>Schedule Views</td>
<td>There are two different schedule views available within Schedules widget. Depending on your preference you can select either Gantt view or Tabular view.</td>
</tr>
<tr>
<td>Sorting</td>
<td>Allows you to sort information within the schedule grid</td>
</tr>
<tr>
<td>Refresh</td>
<td>Updates the information in the workspace with the most current data.</td>
</tr>
<tr>
<td>View Comments</td>
<td>Displays any comments associated with shifts or pay codes.</td>
</tr>
<tr>
<td>Share</td>
<td>Allows you to print or export the data from the widget into Excel.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves any changes to the database. The Save button illuminates when you need to save your changes.</td>
</tr>
<tr>
<td>GoTo</td>
<td>Allows you to navigate to another Kronos component for employees selected within the schedule grid.</td>
</tr>
</tbody>
</table>
Managing Basic Schedules

**SCHEDULE WORKSPACE**

The workspace displays each employee’s schedule for the dates selected in the Time Period field. You can view the workspace in either the Gantt View or Tabular View. Both are described below.

**Gantt View**

To access the Gantt view, click the Gantt View button on the toolbar.

The following table describes the Gantt view indicators and their functions.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Mon 4/16" /></td>
<td>Orange highlights and vertical line indicate the current date and time.</td>
</tr>
<tr>
<td><img src="image" alt="Day 8:00AM" /></td>
<td>Blue cells indicate a normal shift.</td>
</tr>
<tr>
<td><img src="image" alt="Author" /></td>
<td>Green cells indicate a scheduled pay code.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>By Employee</th>
<th>Sun 4/12</th>
<th>Mon 4/16</th>
<th>Tue 4/18</th>
<th>Wed 4/19</th>
<th>Thu 4/20</th>
<th>Fri 4/21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tester, Employee</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td></td>
</tr>
<tr>
<td>Tester, Manager</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td></td>
</tr>
<tr>
<td>Tester, Payroll</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td></td>
</tr>
<tr>
<td>Tester, Salary</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td></td>
</tr>
<tr>
<td>Tester1, Employee</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td></td>
</tr>
<tr>
<td>Tester2, Employee</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td></td>
</tr>
</tbody>
</table>
Managing Basic Schedules

**Tabular View**

To access the Tabular view, click the Tabular View button on the toolbar.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>An orange highlight displays the current date.</td>
<td></td>
</tr>
<tr>
<td>A blue line within a cell Indicates an assigned shift.</td>
<td></td>
</tr>
<tr>
<td>An (x) within the cell indicates a shift with a transfer.</td>
<td></td>
</tr>
</tbody>
</table>
MODULE 5: WORKING WITH SCHEDULE GROUPS

MODULE OBJECTIVES:

- Access Schedule Groups.
- Assign an employee to a schedule group.
- Remove an employee from a schedule group.
WORKING WITH SCHEDULE GROUPS

The View icon located in the toolbar sorts employees by schedule group name. This allows you to organize and view employees by job or shift assignment. For example, First Shift, Second Shift, Exempt, Laundry, Food Services, etc. The schedule group name displays on a separate line and employees assigned to that group are listed in alphabetical order underneath. Schedule assignments and edits follow the same process in both the By Employee and By Group options.

LEARNING SCENARIO

You need to assign an employee to the first shift schedule group so you can easily view and evaluate their schedule with the other first shift employees.

Facilitator: Access the By Group option and explain the different view of the

ASSIGN AN EMPLOYEE TO A SCHEDULE GROUP

1. Click the View icon and select By Schedule Group.

2. Click the drop-down arrow in the Context Selector Time Period field and select a date to view.

3. Right-click the employee’s Name.
ASSIGN AN EMPLOYEE TO A SCHEDULE GROUP

4 Select Add to Group.

5 Select the appropriate Schedule Group from the drop-down menu.

6 Click the calendar icon in the Start Date field and select the date the group assignment begins.
ASSIGN AN EMPLOYEE TO A SCHEDULE GROUP

7 Click the calendar icon in the End Date field and select the date the group assignment ends. If there is no foreseeable end to the group assignment, select Forever.

8 Click Apply.

9 Validate that the employee has now been assigned to the new Schedule Group.

10 Click Save.

ADDITIONAL INFORMATION

- An employee can be assigned to more than one schedule group at the same time.
- When an employee changes jobs or shift assignments, you can follow the same steps to remove the employee from a schedule group and assign them to a different group.
MODULE 6: WORKING WITH SCHEDULE PATTERNS

MODULE OBJECTIVES:

- Describe the purpose of schedule patterns.
- Navigate the Pattern Editor.
- Build a schedule using a pattern template.
- Create a schedule without a template.
- Delete a pattern from an employee’s schedule.
SCHEDULE PATTERN OVERVIEW

The Schedules widget allows you to instantly assign a schedule pattern to employees who work repeatable shifts on a regular basis. Once a pattern is applied to an employee’s schedule, it repeats the predefined shifts and days until an end date is defined or the pattern is deleted or overridden by another pattern. There are two methods for using schedule patterns: 1) inserting a predefined pattern template, or 2) creating an ad hoc pattern by manually entering shift days and times. In both cases, schedule patterns help you quickly assign schedules to employees for a defined period of time.

ASSIGNING A PATTERN TEMPLATE

LEARNING SCENARIO

You have an employee who works the same shifts on the same days every week. To make scheduling quicker, insert a predefined pattern template to the employee’s schedule. Set the end date to Forever.

ASSIGN A PATTERN TEMPLATE

1. Right-click the employee’s name in the Schedules widget.

2. Click the Schedule Pattern icon.

3. Click the calendar icon in the Start Date field and select the effective date on which the employee begins working the pattern.
ASSIGN A PATTERN TEMPLATE

4 Click the calendar icon in the End Date field and select the last effective date of the pattern. To have the pattern in effect with no end date, select Forever.

5 Optionally, select Override Other Patterns to replace any other assigned pattern.

6 Click Pattern Template and select a template from the list.

7 Click Apply.

8 Verify the pattern displays for the correct dates and click OK.

9 Click Save.
CREATING A SCHEDULE PATTERN WITHOUT A TEMPLATE

If a pattern template is not available in the drop-down list, you can build an ad hoc pattern for an employee. The ad hoc pattern is assigned to the selected employee; it cannot be saved and assigned to employees at a later time.

LEARNING SCENARIO

You have an employee who works the same shifts on the same days every week, but there is not a pattern template for the specific schedule. You create a single-use pattern for an employee. Create a pattern to accommodate the following schedule:

<table>
<thead>
<tr>
<th>SUN</th>
<th>MON</th>
<th>TUE</th>
<th>WED</th>
<th>THU</th>
<th>FRI</th>
<th>SAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Off</td>
<td>7a – 3p</td>
<td>7a – 3p</td>
<td>3p – 11p</td>
<td>3p– 11p</td>
<td>Off</td>
<td></td>
</tr>
</tbody>
</table>

CREATE AN AD HOC PATTERN

1. Click the drop-down arrow in the **Time Period** field and select the timeframe the pattern begins.

2. Right-click the employee’s name in the **Schedules** widget.

3. Click **Schedule Pattern**.

4. Click the drop-down arrow in the **Anchor Start Date** field and select the effective date on which the pattern starts.
CREATE AN AD HOC PATTERN

5. Click the drop-down arrow in the **Start Date** field and select the effective date on which the employee begins working the pattern.

6. Click the drop-down arrow in the **End Date** field and select the last effective date of the pattern. To have the pattern in effect with no end date, select **Forever**.

7. Optionally, select **Override Other Patterns** to replace any other assigned pattern.

8. Set the **Define Pattern for** field to either **Days** or **Weeks**, and enter the number of days or weeks the pattern repeats.

9. Click the **Day** cell for the day you want to add a shift. Enter shift start and end times separated by a hyphen (i.e. 7a-300p).
CREATE AN AD HOC PATTERN

10  Continue adding shifts for the remainder of the scheduled days within the pattern.

11  Click Apply.

12  Verify the pattern displays for the correct dates and click OK.

13  Click Save.

ADDITIONAL INFORMATION
You can double-click the employee name at any time to make any necessary pattern adjustments.
DELETING A PATTERN FROM A SCHEDULE

If a pattern no longer fits an employee’s schedule, you can delete the pattern assignment.

LEARNING SCENARIO

The employee for whom you created the single-use pattern, no longer works those shifts and days. Delete the pattern from the employee’s schedule.

DELETE A PATTERN FROM A SCHEDULE

1. Right-click the employee’s name in the Schedules widget.

2. Click Schedule Pattern.

3. Click the Delete Row icon.
DELETE A PATTERN FROM A SCHEDULE

4 Click Yes to confirm the deletion of the pattern.

5 Verify the pattern no longer displays and click OK.

6 Click Save.
MODULE 7: WORKING WITH SHIFTS

**MODULE OBJECTIVES:**

- Describe the methods available for adding and editing shifts.
- Insert a shift template.
- Describe the purpose of pay codes.
- Schedule time using pay code edits.
- Describe the purpose of transfers.
- Schedule labor account and work rule transfers.
Managing Basic Schedules

**ADDING SHIFTS**

The Schedules widget provides different methods for adding shifts into employee schedules depending on the situation. You can add shifts using one of the following methods:

1. In-cell entry – used for adding simple shifts that include only a shift start and end time. Shift start and end times are entered directly in the date cell.
2. Shift Templates – used when entering a common shift in which a shift template has already been created.
3. Shift Editor – used when adding more complex shifts that contain specific shift attributes (i.e. shifts with transfers, etc.).

**INSERTING A SHIFT TEMPLATE**

**LEARNING SCENARIO**

Your employee works a common shift from 8:00 AM to 4:30 PM. Since the shift is used often, there is a shift template already created. Insert the shift template for Friday.

**INSERT A SHIFT TEMPLATE**

1. Locate the employee’s row and right-click the cell under the date where you want to add a shift. Select **Insert Shift Template**.

   ![Insert Shift Template](image)

2. Select a **Shift Template** from the list.

   ![Insert Shift Template List](image)

3. Click **Save**.
Managing Basic Schedules

**INSERT A SHIFT TEMPLATE**

**ADDITIONAL INFORMATION**
If you determine that an employee’s shift needs to be shortened or lengthened, you can edit the shift start or end times accordingly.

**DELETING SHIFTS**
If an employee is no longer working a specific shift, you can delete the shift from the schedule. If the employee’s schedule changes, it is important to update the Schedules widget accordingly, so the employee does not receive an exception in the timecard.

**LEARNING SCENARIO**
Your employee is no longer working the 8a-430p shift on Thursday, so you must delete the shift.

**DELETE A SHIFT**

1. Right-click the date cell for the employee whose shift you want to delete. Select **Delete**.

2. Click **Save**.
SCHEDULING A PAY CODE AMOUNT

Entering a pay code into an employee’s schedule allows you to schedule non-worked time. Non-worked hours include sick time and vacation or paid time off. You should schedule your employees’ non-worked time when you know about it in advance. Once the scheduled date becomes part of the current pay period, the pay code amount automatically populates the employee’s timecard.

LEARNING SCENARIO

One of your employees is going to be on Jury Duty on Friday. You want to schedule a pay code amount in the employee’s schedule as a reminder of the absence, but more importantly to populate the employee’s timecard accordingly.

<table>
<thead>
<tr>
<th>SCHEDULE A PAY CODE AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Locate the employee’s row and right-click the date to which you want to enter a pay code amount. Select <strong>Add Pay Code</strong>.</td>
</tr>
</tbody>
</table>

![Add Pay Code](image)

<table>
<thead>
<tr>
<th><strong>2</strong> Confirm the date selected in the <strong>Effective Date</strong> field is correct.</th>
</tr>
</thead>
</table>

![Add Pay Code](image)
Managing Basic Schedules

**Schedule a Pay Code Amount**

3. From the Pay Code drop-down list, select the pay code.

4. Enter the number of hours to allocate to the pay code in the Amount field or select from the pre-defined list.

5. If the pay code amount must replace the employee’s existing shift, select the Override Shift check box. To override the entire shift, select Whole Shift. To override part of the scheduled shift, select Partial Shift.

6. In the Start Time field, enter the effective time for the pay code amount. If the employee already has a schedule, the shift start time is the default time.

7. In the Repeat for (D) field, enter the number of consecutive days for which the pay code amount applies.

8. Click Apply.
Managing Basic Schedules

<table>
<thead>
<tr>
<th>SCHEDULE A PAY CODE AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
</tr>
</tbody>
</table>

![Share Save Go To buttons]
Managing Basic Schedules

**TRANSFERS OVERVIEW**

Throughout a shift, an employee punches for the time they work and that time is allocated to their default labor account and work rule assignment along with any non-worked hours. Transfers allow you to allocate hours to an alternate labor account in order to charge the hours where they are worked. This process is useful when employees work in a different Process Level or a different Department.

When you schedule a work rule transfer, the Kronos application applies a different set of rules to the employee’s shift when calculating hours. This feature allows certain worked time to calculate differently than other worked time.

If the transfer is known in advance, it is entered into the schedule. When an employee punches in and out, the hours are automatically allocated according to the scheduled transfer.

**SCHEDULING LABOR ACCOUNT TRANSFERS**

**LEARNING SCENARIO**

One of your employee’s is going to work in Dining Services next Wednesday. In order for labor to be allocated correctly, you need to schedule the employee in the department where the employee is working. Create a shift and include a labor account transfer.

**SCHEDULE A LABOR ACCOUNT TRANSFER**

1. Locate the employee’s row and right-click the date for which you want to enter a shift with a labor transfer. Select **Add Shift**.

2. Confirm the date selected in the **Start Date** field is correct.
Managing Basic Schedules

**SCHEDULE A LABOR ACCOUNT TRANSFER**

3. For the hours the employee is scheduled to work before the transfer, complete the **Start Time** and the **End Time** fields accordingly.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Type</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/15/2020</td>
<td>Regular</td>
<td>8:30am</td>
<td>4:30pm</td>
</tr>
</tbody>
</table>

4. Click the **Labor Level Transfer** field and select the applicable Labor Account from the list. If the labor account does not display, click **Search**.

5. Click the drop-down arrow for the labor level for which you want to transfer and select a labor entry from the list. For this example, select **Department**.

6. Click **Apply** on the **Transfer** dialog box.

7. Click **Apply** again on the **Add Shift** dialog box.

8. Click **Save**.
SCHEDULING WORK RULE TRANSFERS

LEARNING SCENARIO

An employee is called in on Friday. Since any on call time is calculated differently than regular worked time, a different work rule application is needed. Create a shift and include a work rule transfer.

SCHEDULE A WORK RULE TRANSFER

1. Locate the employee’s row and right-click the date for which you want to enter a shift with a work rule transfer. Select Add Shift.

2. Confirm the date selected in the Start Date field is correct.

3. Click the Start Time field and enter the time the shift begins.

4. Click the End Time field and enter the time the shift ends.

5. Click the drop-down arrow in the Work Rule Transfer field and select a work rule from the list.
6. Click Apply.

7. Click Save.

**ADDITIONAL INFORMATION**

A double arrow icon (==) displays next to the shift indicating a transfer. You can hover your mouse over the shift to display the transfer details.