



## Kronos Scheduler: Staffing Widget Guide V8.1

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### Purpose

The Staff Management widget gives you quick access to your daily staffing plan so that you can make adjustments to your schedule when unforeseen events occur, such as when an employee calls in sick, or when an unplanned event requires extra staff (or less staff) during a scheduled time period.

The Staff Management widget allows you to operate optimally across departments or units with your available budget and staffing resources. *Note, however, that it is a tool for daily operations, and it does not take the place of the Schedule Planner or the Schedule widget.*

The staff management process, involves:

- Importing or manually entering external data (planned workload, budget data, etc.)
- Verifying shift fidelity (time-off requests, sick calls, etc.)
- Adjusting staff to new demands based on the above factors
- Repeating the process as necessary, often several times a day

The locations and jobs that you can select are determined by the locations and jobs in your organizational group.

The Staff Management widget reflects changes to the schedule that are made, for example, in the Schedule Planner or the Schedule widget. Changes made to shifts in the Staff Management widget, are reflected in the schedule, as well. Use Refresh to ensure that you are seeing the most up-to-date information



### Special Notes:

#### Features

- Create, edit or delete shift segments
- Add, edit or delete breaks from Break Action Menu

#### Gaps

- Staff Management Widget does not use any of the existing system settings or Coverage Counting settings when calculating Planned, Scheduled numbers and Volume.
- All Day ignores Day Divide information and calculates from Midnight to Midnight.
- Cannot delete ALL segments from a shift – you must have at least one non break segment that remains in the shift.
- Cannot make changes to a locked shift/day



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## Areas of Staff Management Widget

### Summary View

CT Staffing Widget

Loaded: 8:14PM Tomorrow Solnet South Edit

Select All Open Selected Time Sp Jobs Refresh

Location Workload plan Census

	Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
<input type="checkbox"/>	Sachem	0	0	0	0		0
<input type="checkbox"/>	Sachem	↓ 4	0	4	0		0
<input type="checkbox"/>	Recreation	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	Quinnipac	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	PRTF OPS Office	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	One	N/A	N/A	N/A	N/A		N/A

Select the Location(s) that you want to view

The Summary View helps you identify at a glance which units and departments that you work with have staffing issues. Within the grid in the Summary View, you can sort any of the columns to display the data in a way that is most useful for you. Click a column header to sort the values in ascending order; click the header again to sort in descending order.

### Date to display

You can select Today, Tomorrow, or Yesterday as the date to display.



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## Detail View - Compact

Select Available Employees in the toolbar to display or hide the list of available employees in the Employee Pool.

Quick Actions
 Available Employees
 Sort
 Time Span
 Jobs
 Shifts
 Comfortable View
 Summary
 Refresh

Shifts Coverage Setting x

Sachem				
Job	Planned	Scheduled	Variance	
CSUS	0	0	0	
CSW	3	0	-3	
CSWLEAD	0	0	0	

Manhasset				
Job	Planned	Scheduled	Variance	
PRPSYC	0	0	0	
PSYCHI-PD	0	0	0	
PSYCHOCL	0	0	0	

Passaic				
Job	Planned	Scheduled	Variance	
PRPSYC	0	0	0	
PSYCHI-PD	0	0	0	
PSYCHOCL	0	0	0	

CMCU				
Job	Planned	Scheduled	Variance	
AA	0.44	0	-0.44	
APRN	0.35	0	-0.35	
LPN	0	0	0	



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Shifts Coverage Setting x

Available Employees [27]			Sachem				
Name	Job	Schedule	4	0	PLN 4	SCH 0	CEN 0
			Job	Planned	Scheduled	Variance	
	CSWLEAD		CSUS	0	0	0	
	CSW		CSW	3	0	-3	
	CSUS		CSWLEAD	0	0	0	
	CSUS						
	CSWLEAD						
	CSW						
	CSW						
	CSWLEAD						
	CSW						
	CSW						
	CSWLEAD	2:45PM - 1...					
	CSWLEAD	2:45PM - 1...					

  

Passaic				
0	0	PLN 0	SCH 0	CEN 0
Job	Planned	Scheduled	Variance	
PRPSYC	0	0	0	
PSYCHI-PD	0	0	0	
PSYCHOCL	0	0	0	

**The Employee Pool** is a list of employees who are not scheduled to work in the selected context and do not have pay codes in the selected context. Their primary job or a job in their transfer set matches the selected job and selected location in the context.

The Employee Pool includes all the people from the manager's/Scheduler's organizational group. Hover your mouse over an employee name to see a tooltip with job and shift details, and rule violations, if any.



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Steps to Employee to shift Assignment		Description
1	From the Home Page, click the Plus "+" next to the My Information Tab. Next select <i>Manage My Department</i>	
2	From the Related items list, click a CT Staffing Widget.	
3	In the Location Show drop-down list, select a department from the Organization Map which will display employees for you to view. In the screen shot used a Location Query that contains all Caroline or Solnit site.	
4	In the <b>Time Period</b> drop down list, select a specific Yesterday, Today, Tomorrow.	



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### 5 Refresh Often

Each row for a location contains the last name, first name, and job (in the unit) for the first segment of the selected time span.

Hover the cursor over the employee name to see a tooltip with the job details, and shift or zone time details, for the employee. When there is a long list of employees in a location, you can use the scroll bar to scroll through the entire list. Pay codes **Green** type indicates a pay code. Pay codes show only for employees for whom this is the primary location.

The screenshot displays the Kronos Scheduler interface. At the top, there are navigation icons for Quick Actions, Available Employees, Sort, Time Span, Jobs, Shifts, Comfortable View, and Summary. Below these is a 'Shifts' dropdown menu set to 'Coverage Setting'. The main area is divided into two sections: 'Available Employees [27]' and 'Sachem'. The 'Available Employees' table has columns for Name, Job, and Schedule. The 'Sachem' section shows a summary row with 4 employees, 0 checked, and 4 PLN, 0 SCH, 0 CEN. Below this are several rows for 'Open Shift' with job code CSW and various time ranges. A second section for 'CMCU' shows a summary row with 1.15 employees, 0 checked, and 1.15 PLN, 0 SCH, 0 CEN, followed by rows for 'Open Shift' with job code AA and time ranges.

The screenshot shows a tooltip window titled 'Transfer template'. It has tabs for 'Jobs' (selected) and 'Shifts', and a 'Coverage Setting' dropdown. The primary job is listed as './DCF-DCF91000/Solnit S/Custody/Building 8/Manhasset/CSW'. Below this is a table with columns for Name, Job, and Schedule. The table contains several rows: CSW, CSWLEAD (2:45PM - 1...), CSWLEAD (2:45PM - 1...), CSW (Vacation), CSWLEAD, and CSWLEAD.



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6	<p>To fill an open shift with an employee from the Employee Pool, select the employee in the pool and drag the employee to the open shift</p>	<p>The screenshot illustrates the workflow for filling an open shift. The top portion shows a 'Shifts' window with a dropdown menu set to 'Coverage Setting'. Below it, an 'Available Employees [27]' window is open, displaying a list of employees with columns for Name, Job, and Schedule. A red box highlights the 'CSW' job type. A vertical bar is positioned over the 'Open Shift' in the main shift view, and a red arrow indicates the drag action from the 'CSW' employee in the pool to this shift. The bottom portion of the screenshot shows the 'Available Employees [27]' window again, with the 'CSW' employee selected and highlighted in blue.</p>