CREW Time Manager Guide

Purpose CREW Time creates a schedule based on forecast data specific to your store and makes recommendations for the number and types of roles needed. It then creates shifts for those roles based on your peoples' availability and certification.

This document will help guide you through the steps on how to input a schedule and complete other scheduling tasks using CREW Time. The goal is to schedule to meet customer demand (Demand Hours) and add appropriate receiving and training shifts.

Refer to Scheduling to Demand Operational Best Practice and CREW Time Reference Materials page for more details.

Manager tasks include:

- Creating a CREW Time Schedule - page 1
- Configuring Employee Availability - page 3
- Handling Employee Requests - page 6
- Assigning Open Shifts - page 7
- Training and Receiving Shifts - page 10
- Accessing Activity Based Schedule - page 12
- Publishing a Schedule - page 14
- Adding employees - page 15
- Deleting and regenerating schedules - page 15
- Transferring labor information into Excel- page 15
- UI and ABV (Activity Based View) Changes (as of Feb. 2023) – page 16

Expectations
1. Review availability and day off and time off requests by EOD Tuesday.
2. After the schedule is generated start by filling open shifts, then continue your edits using features such as clicking and dragging or splitting shifts.
3. The schedule is then finalized / published on Saturday night.

Creating a CREW Time schedule Follow these steps to create a schedule:

Step	Action
1	Enter Employee Availability and Day Off/Time Off Requests.
	Input availability for all employees and set Status to **Approved**. Only change if someone's availability changes, or if an employee requests time off.
	Note: *Employees can send in availability changes/ day off and time off requests from the ESS app – these requests will also need approved to take effect. The status dropdown needs to be set to **Approved** or it will not take effect.*
	More details: • Employee Availability - page 3 • Handling Employee Request - page 6

Continued on next page

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	Step	Action
Creating a CREW Time schedule	2	Assign Open Shifts. Select the Open Shift tab at the bottom of the schedule. Click and drag the shift to the open spot or click on the shift and then click **Assign** to see employees that can fill the shift. More Details: • Open Shifts - page 7
	3	Once you have filled open shifts you are now ready to create Training and Receiving shifts. In the Weekly Schedule view, right click on an empty white space, set the start / end times, then set the task (Training or receiving). Monday reporting to staff will show if Training and Receiving hours have been entered correctly. More details: • Training and Receiving Shifts - page 9
	4	Examine the Activity Based View Click on the day in the blue line at the top of the schedule. Review this for anything you might have missed. The Employee Availability Report will assist in finding employees to cover shifts. More details: • Accessing Daily Activity Based Schedule - page Accessing activity based view schedule - page 9

Regenerate schedule

If you missed approving availability, you can approve the requests and rerun the schedule.

Approve any missed availability, click **Action** in the upper-right corner and select **Delete Current Schedule**. When the timeline comes up, click the white check box at the top that says Auto Redirect and then click on **Generate Optimized Schedule**.

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Availability

Availability allows CREW Time to create shifts for your people when you – and they – prefer to work. Properly used, it can do the following:

- prevent the scheduler from creating shifts on an employee's preferred day off or during early out

- prevent scheduling shifts when they are not available to work (school, etc.)

- prevent Senior Assistant and Manager being scheduled for same day off

- end shifts for "all day" people so after-school employees will be auto scheduled.

- Allow you to stagger the Manager and Senior Assistant days off.

Managers will want to enter a new hire's availability when they arrive at the store. Employees should be trained and expected to maintain their own going forward.

Setting Availability

- Set employee availability according to the hours they are available to work
  - IF available all day everyday use 'Totally Available'. Otherwise, enter the hours they are available each day and check "non-working day" for their days off
- Availabilities should be set to cover AM and PM demand
  - Example: Opener availability should be 7:30 AM when possible and Closers should be 6:30 PM when possible.
- For part-time employees or employees who are not available for the entire day, set availability to begin and end at the start of the day part for scheduling efficiency.
  - Day Parts:
    AM 7:30 – 11 AM; MID 11 AM – 2 PM; PM 2PM – 6:30 PM
    - Example: An employee with 7:30 AM to 2 PM availability would be more likely to be scheduled for a particular task with demand in the AM and MID over an employee with the same certifications and an availability of 8:00 AM to 1 PM

Viewing Availability

- On Weekly Schedule. Click icon next to printer>Click Display Preference>Click Text radio button under Availability> click Apply

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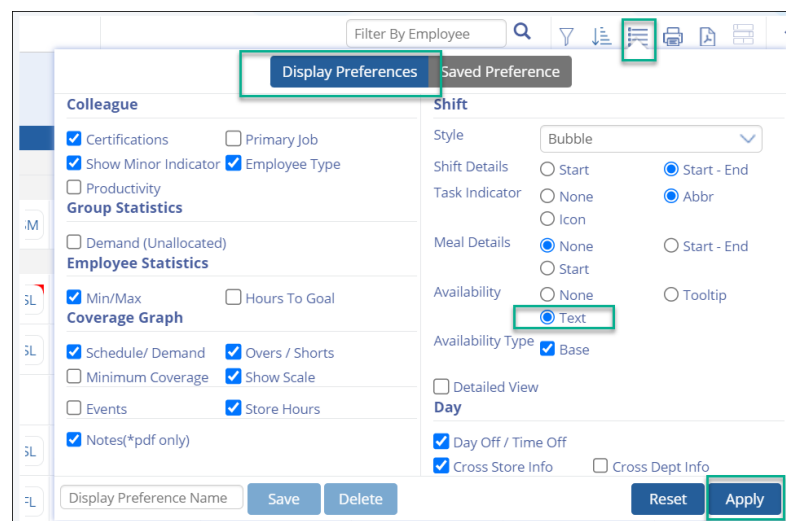
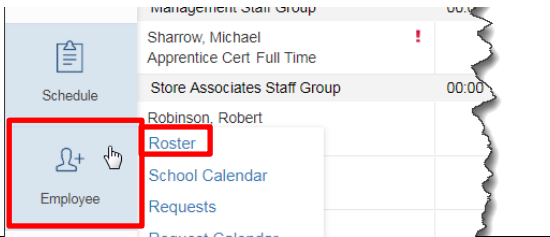**Re-approving Availability**

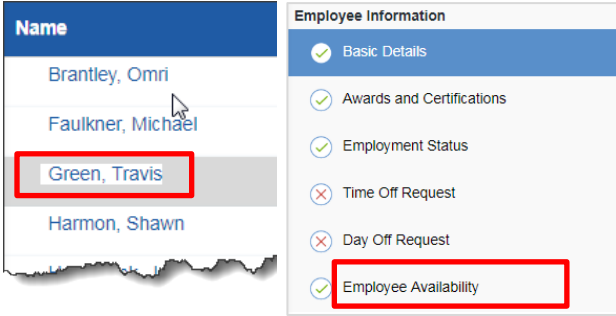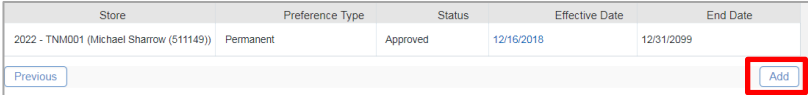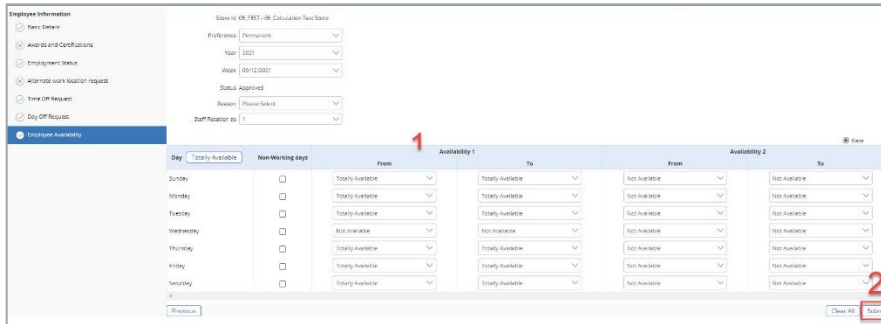You might have discovered that you set up availability and submitted it, but then needed go back and approve it.

The system will allow you to select "Approved" as a status, so you can do it right when you set it up.

The process makes more sense when you consider that your employees can submit these themselves, and all you'll do is approve or decline them.
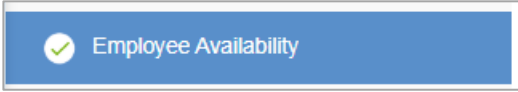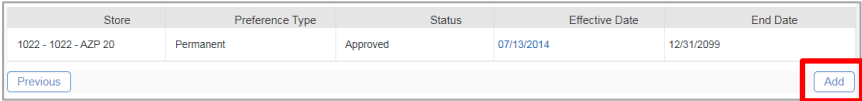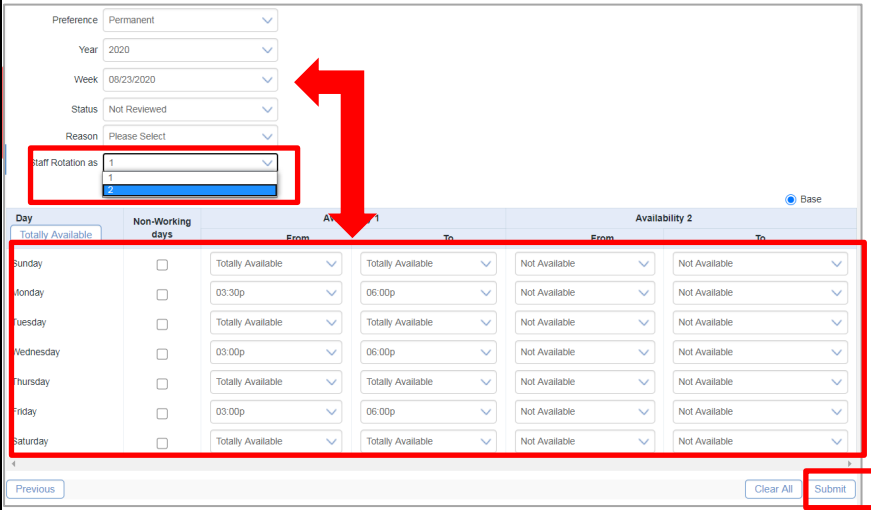
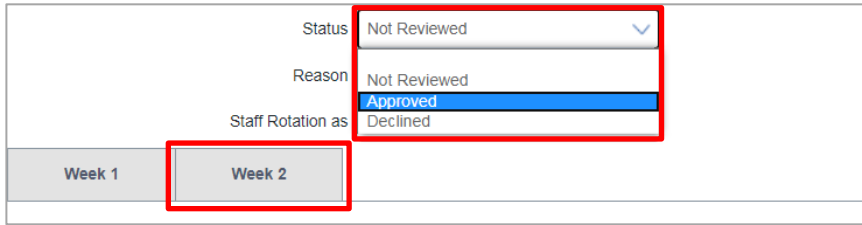**Configuring employee availability**

Follow these steps to configure employee availability in CREW Time.

Step	Action
1	After you log into CREW Time, hover the mouse over the **Employee** tile on the left side of the screen and select **Roster**.
2	Open an employee's record and select **Employee Availability**.
3	Click **Add**. This is an example of the **Employee Availability** screen. Configure the necessary settings and click **Submit**. Preferences – allow for permanent (lasts until it's changed) or temporary (lasts for one week). You can select the year and week to start (only a futur date). Best practice: even if the employee is available all day, set up their time so that they are unavailable to allow after-school employees to get hours. • The **Status** field activates once the availability request is submitted This field allows you to approve or decline the request. 2. Total Availability – marks employee as **Totally Available** for the specif day 3. Non-Working days – marks the employee as **Not Available** for the specific day

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Rotating Availability

Rotating availability allows for availability changes from week to week. An example of this might be a student who is available Monday, Wednesday, and Friday one week, and then Tuesday and Thursday the next week.
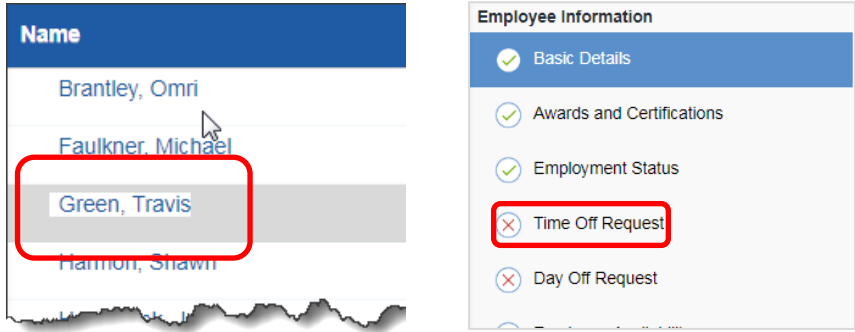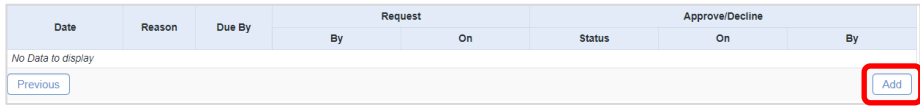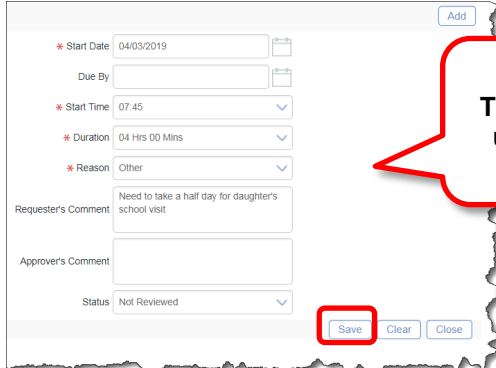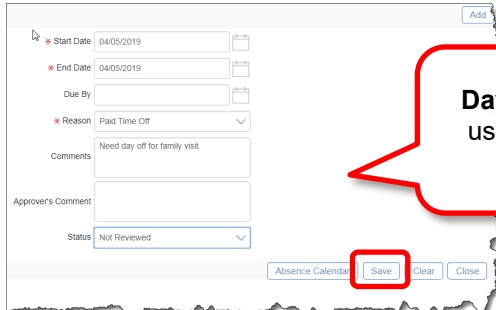
Follow these steps to configure rotating availability for an employee.

Step	Action
1	Select the employee from your roster and click **Employee Availability**. ✅ Employee Availability
2	Click **Add**. | Store	Preference Type	Status	Effective Date	End Date
1022 - 1022 - AZP 20	Permanent	Approved	07/13/2014	12/31/2099	 Previous · · · Add
3	Ensure the availability is configured accurately for the starting week. Change **Staff Rotation as** to **2** and click **Submit**. Preference: Permanent Year: 2020 Week: 08/23/2020 Status: Not Reviewed Reason: Please Select Staff Rotation as: 1 / 1 / 2
4	Configure the availability for the **Week 2** tab. You can also approve the new availability at this point before submitting if you choose. Status: Not Reviewed / Not Reviewed / Approved / Declined Reason Staff Rotation as Week 1 · Week 2

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Handling employee time off / day off request

Follow these steps to add and set a status for an employee time off/day off request in CREW Time.

Note: *See Employee ESS Guide for how to allow employees to send in day off/ time off requests.*

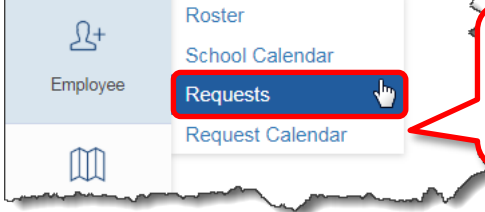| Step	Action
1	After logging into CREW Time, hover the mouse over the **Employee** tile on the left side of the screen and select **Roster**.
2	Open an employee's record and select **Time Off Request** or **Day Off Request** depending on what is needed.
3	Click **Add** (this portion of the screen is identical for both types of requests).
4	Configure the **Time Off Request** or **Day Off Request** settings and click **Save**. Time Off Requests are used for partial times. Day Off Requests are used for full days or a range of dates.

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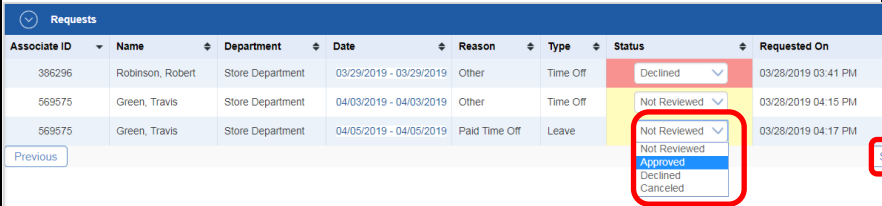|		
Handling employee time off / day off request	**5**	To view and approve, decline, or cancel employee requests, hover over the **Employee** tile on the left side of the screen and select **Requests**. Employee tile menu showing: Roster, School Calendar, **Requests**, Request Calendar. Callout: *Requests can also be viewed in a calendar format.* The calendar view provides more context. Managers can see how many - and in what order – multiple requests were made for a given day.
	6	Select an option from the **Status** menu and click **Save**. Requests table with columns: Associate ID, Name, Department, Date, Reason, Type, Status, Requested On. 386296 – Robinson, Robert – Store Department – 03/29/2019 - 03/29/2019 – Other – Time Off – Declined – 03/28/2019 03:41 PM 569575 – Green, Travis – Store Department – 04/03/2019 - 04/03/2019 – Other – Time Off – Not Reviewed – 03/28/2019 04:15 PM 569575 – Green, Travis – Store Department – 04/05/2019 - 04/05/2019 – Paid Time Off – Leave – Not Reviewed (dropdown: Not Reviewed, Approved, Declined, Canceled) – 03/28/2019 04:17 PM Previous Statuses can also be set when adding the request in the beginning.

Open shifts

Managers are expected to manually assign unmet demand to an appropriate employee, and work to minimize the number of open shifts going forward by developing people as needed.
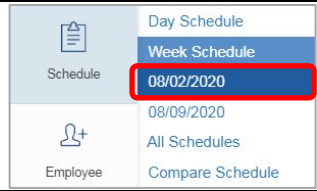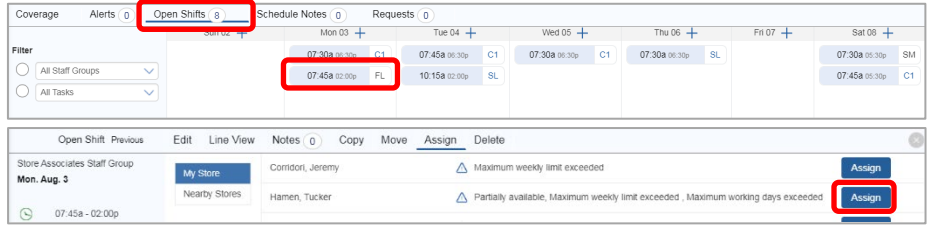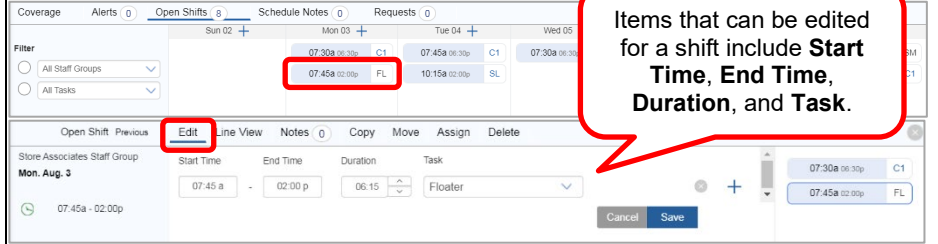
A few additional points:

- There should be one open shift for manager on their day off and at least one Air Check shift per day.

  NOTE: Air Check shift may not show in the Open Shift section. Go to ABV daily page within the schedule, then click on Air Check red box, and select 'Add to Open Shift'.

- It *is* possible to assign an open shift to an employee who is not yet qualified to perform the task. An example might be a Service Tech who has completed the necessary training and is being observed for signoff as a Crew Chief.

Assigning open shifts

Follow these steps to assign and edit open shifts in CREW Time. Refer to the [Assigning Open Shifts](#) guide for more details.

Step	Action
1	After you log into CREW Time, hover over the **Schedule** tile on the left side of the screen and select the appropriate week's schedule.
2	Open Shifts are created when CREW Time is unable to find an available, qualified employee for a given segment of demand. CREW Time allows managers to manually allocate open shifts among store staff. 1. Select **Open Shifts** to display shifts that need to be filled. 2. Click a shift to open its detail. Clicking and dragging open shifts is the fastest and easiest way to assign an open shift 3. Select **Assign** and click the **Assign** button to assign the shift to an available employee.
3	Other items for an open shift may need to be edited by the store manager as well. 1. Click on a shift. 2. Select **Edit**. Items that can be edited for a shift include **Start Time**, **End Time**, **Duration**, and **Task**. **Note:** *A second shift can be added to an employee if the times do not overlap by clicking and dragging the second shift up and dropping it in the white space around the first shift.*

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Assigning and Modifying Shifts

All shifts needed to cover demand will be assigned to an employee or placed in Open Shifts where they can be manually assigned to an employee

Reassign	Swap	Unallocate	Copy	Move	Split	Merge	Coverage	To Do (0)

Shift modification should be done using the functions within the scheduling tool seen above

- Reassign – Assigns the shift to another employee who does not have a shift during that timeframe (Should not be used very frequently if at all)

- Swap – Provides ease when the manager wants certain players on a team together inside the play after the shifts are assigned by allowing the manager to swap shifts between two employees

- Unallocate – Moves the shift from an employee to the Open Shifts and gives the manger the option to assign from there

- Copy – Creates a copy of the shift (Great for Training and Receiving shifts)

- Move – Allows the shift to be moved to another employee and/or to a different day of the week (Should not be used very frequently if at all)

- Split – Allows the shift to be spit. i.e. A 7:30 AM – 6:30 PM shift could be split into two shifts from 7:30 AM to 1 PM and 1PM – 6:30 PM which can then be assigned to two part-time employees

- Merge – Allows two shifts to be merged into 1 shift

NOTE: Assigning the open shifts and using these tools will help to eliminate errors and provide efficiencies in scheduling
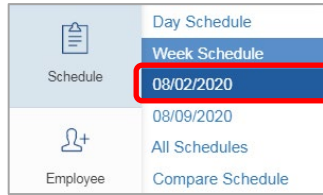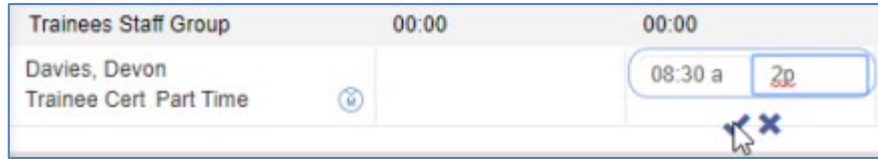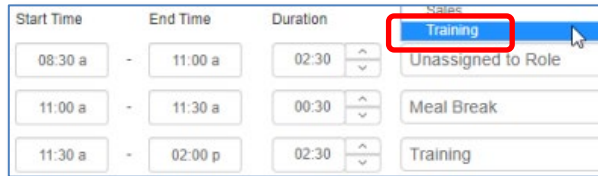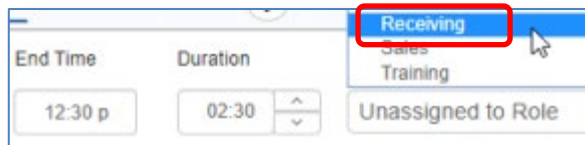
Training and receiving shifts

The expectation is that both Training and Receiving will be covered by employees who are not involved in meeting customer demand, and *any* hours allocated to Trainees will be training hours.

Trainees are not qualified to meet customer demand. Their hours must be manually added to the schedule.

Unloading and receiving merchandise cannot be forecast, so hours required to accomplish this will need to be a separately created shift or added to a currently scheduled Trusted Expert.

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Adding training and receiving shifts

Follow these steps to add training and receiving shifts to a weekly schedule in CREW Time.

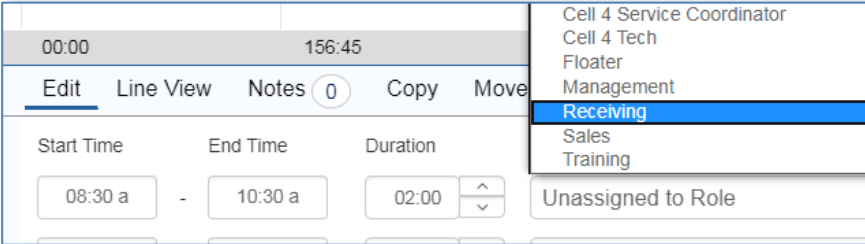| Step	Action
1	After logging into CREW Time, hover over the **Schedule** tile on the left side of the screen and select the necessary weekly schedule.
2	Managers are expected to edit or create shifts in CREW Time to cover training and receiving. 1. Click in a day cell and enter the Start and End time for the shift. *("830a" and "2p" or military time format may be used.)* 2. Click the checkmark to open its detail. 3. Select **Training** as the task Note: A meal break will automatically be inserted for a shift that requires one.
3	The same process can be followed for Receiving hours. Be sure to choose the appropriate task in the drop down.

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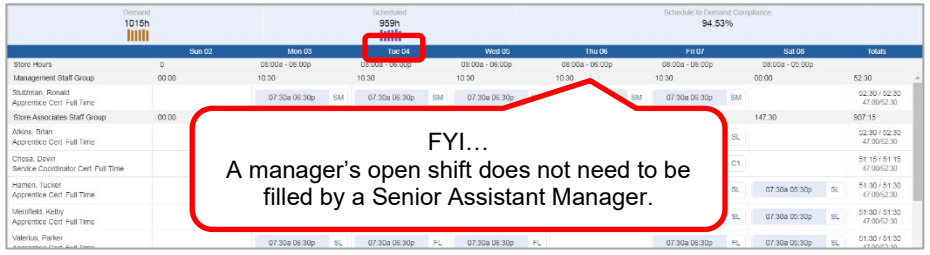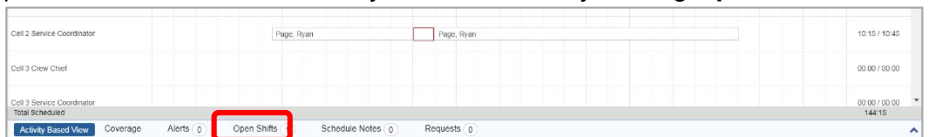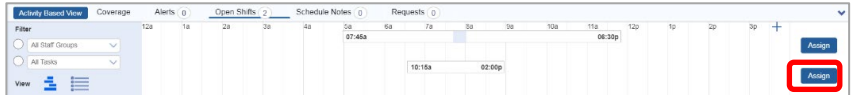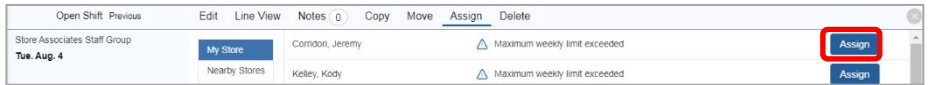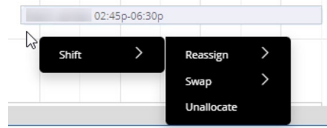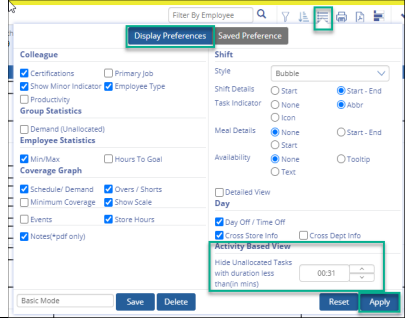|		
Adding training and receiving shifts	4	You may find that your preferred receiving employee has already been scheduled to meet customer demand in some other task. You may either extend their shift start or end time to cover receiving, or you may change the task in a portion of their shift to cover receiving. Any task removed **must** be covered by creating a new shift for an available, qualified employee, or by extending the shift of someone already working.

Accessing activity based view schedule (ABV)

The ABV gives a visualization of where employees are working and if the right people are scheduled at the right time. Follow these steps to access a daily activity based schedule in CREW Time.

Step	Action
1	After you log into CREW Time, select a single day in the week schedule. FYI… A manager's open shift does not need to be filled by a Senior Assistant Manager.
2	The daily **Activity Based View** displays a timeline of each scheduled shift. Many of the same tasks (for example, assigning open shifts) can be performed here as in the weekly schedule view by clicking **Open Shifts**.
3	Open shifts can be viewed in either a schedule view or list view. Select the **Assign** button. Available employees will display in both the upper and lower portions of the screen. Click **Assign** for the employee to which the shift is to be assigned. Managers can also click and drag shifts to move them around.

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Accessing activity based view schedule (ABV)

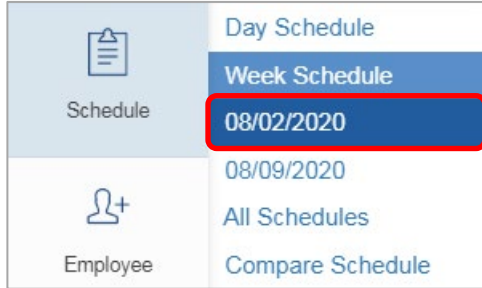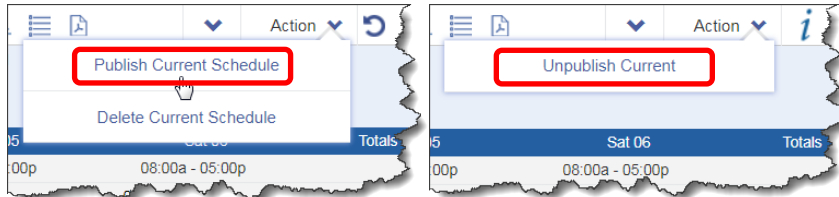| Step	Action	
	Reassign, Swap, Unallocate, Edit, Add, and drag and drop shifts within the ABV.	
	Customize ABV Display Preferences: Hide any increment of unmet demand (remove red boxes) to create a clean look when printing (suggest using 00:31 min as a default).	
4	To Print, go to Reports and select 'ABV', select Date and Print.	

Weekly schedules

The expectation is that managers will make necessary edits, check the schedule for accuracy, and publish the schedule. Doing this enables store associates to view it on their mobile devices or through Employee Self Service (ESS) in the store.
Additional points:

- Employees can view their shifts once a schedule is published.
- Until the schedule is published (or if it is unpublished), shifts are not visible to the employees.
- If the schedule is not manually published by the manager or Senior Assistant, it will "self-publish" on Friday night so store employees can see it.
- If edits are required on Saturday, the manager can unpublish the schedule and make needed changed. Employees cannot view the schedule while it is unpublished.
- On Saturday night, the upcoming week's schedule will become a **Week in Progress** schedule and will remain visible to associates.

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Publishing a weekly schedule

Follow these steps to publish a weekly schedule in CREW Time.

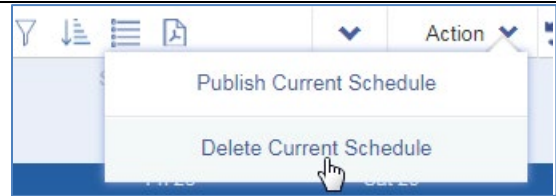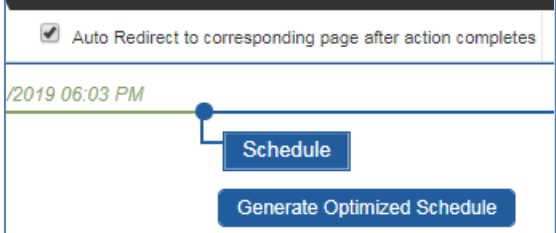| Step	Action
1	Log into CREW Time.
2	Hover over the **Schedule** tile on the left side of the screen and select the upcoming week's schedule.
3	Once you are done editing a schedule, you should to publish it. 1. Open the **Action** menu. 2. Select **Publish Current Schedule**. 3. Select **OK** from the confirmation window. Publishing the schedule allows your employees to view their upcoming shifts in Employee self Service (ESS) on their mobile devices, or in the store's Crew Time application screens. The same process can be followed to unpublish a schedule. This could be used if any scheduling changes need to be made. After Saturday night the schedule cannot be unpublished, but edits can still be made.

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Adding employees

Currently, there is no way to manually add transferred, loaned, or new hire employees to the schedule and roster. However, HR data is fed to CREW Time daily, so these employees will appear within a couple days of being updated in Workday.

Deleting and regenerating schedules

Occasionally, you might find that someone comes to you with a request that should have been in place before the scheduler ran.

Understand that you will lose any edits you've made up to that point, but here's how to start from scratch:

Step	Action	
1	From the **Action** drop down, select **Delete Current Schedule**.	
2	On the next screen, select **Auto Redirect** and then **Generate Optimized Schedule**.	

Enjoy your new schedule!

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**Transferring labor information into Excel**

The intent of this document is to lay out a temporary procedure for transferring labor information from CREW Time Scheduling into an excel template similar to the KD18. By following this process you can use accurate CREW Time data in a format you are familiar with.

Click on **Labor Forecast** and select a single day. This will show you the number of people that the system wanted, and in which roles. If the right number of Trusted Experts are available to meet demand, the system will create shifts for a total of 152 hours. *Demand Hours includes manager hours.*

The system does not forecast the need for or create training or receiving shifts.
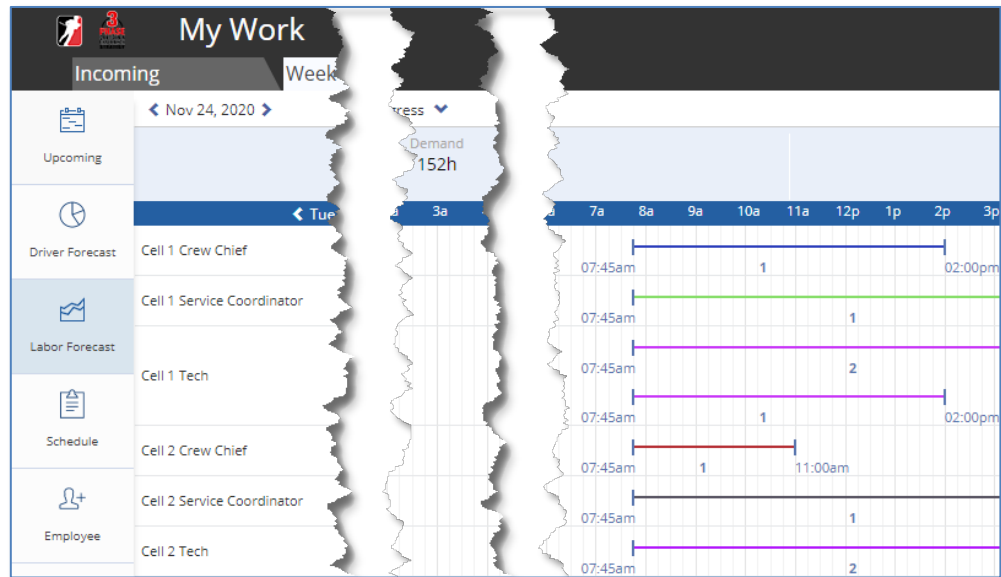
You can use the roles from the Labor Forecast to determine the number of active boxes you need to fill, and hand write or type the names you choose.

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UI Changes
(as of Feb. 2023)

Openers, Closers and Lunches appear in the Weekly and Daily views in the Banner.

Managers can access the Activity Based View with one-click option in the Menu toolbar.
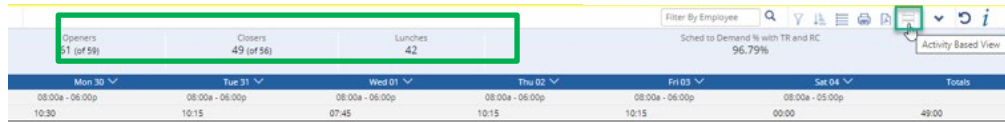
NOTE: Training and Receiving shifts are included in the total (**Example:** If it says 18 (of 16), the 18 include TR and RC shifts).

Activity Based View
(new features as of Feb. 2023)

Red boxes – Show unmet demand Black boxes – Who you have in a specific role. You can remove small red boxes that represent unmet demand from ABV.	
Reassign, Swap, Unallocate, Edit, Add, and drag and drop shifts within the ABV.	
Customize ABV Display Preferences: Hide any increment of unmet demand (remove red boxes) to create a clean look when printing (suggest using 00:31 min as a default).	

Contact

Please reach out on the **Feedback** button on the Scheduling AOR page or call/email with questions WFMteam@discounttire.com - we enjoy hearing from you.

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