# Kronos Workforce Timekeeper v8.1

Managing Timecards and Basic Schedules

Course Guide v.5

# Table of Contents

# Getting Started

## Importance and Benefits of Workforce Timekeeper

### Purpose

It is important that your employees are compensated accurately. To make this happen, you need to manage employees' worked and non-worked hours, as well as attendance issues, in an efficient and timely manner. The application supports your ability to perform these tasks so that the data sent to payroll is accurate.

Workforce Timekeeper provides the following benefits:

- Automates and simplifies your timekeeping and scheduling tasks
- Saves both time and money
- Assists with scheduling standardization and policy enforcement
- Supports sharing relief staff among departments
- Improves time-and-attendance tracking
- Enables better end-to-end timekeeping
- Automates the time-off request process
- Supports workforce productivity metrics

## Important Information

- Kronos access is driven by reporting relationships or cost center, not physical location. The default is reporting relationship.
- Supervisor submits IT Access Request form for Kronos Timekeeper access by non-managers. Completing training does not grant access.
- Schedules are created for ALL employees
  - Both exempt and non-exempt
- Exempt employees do not clock in or out
  - They do have a schedule in Kronos
  - They only enter time off (e.g. CTO, PTO or transfers)
- All non-exempt employees are required to clock in or out (either at a clock or via a computer)
- Employees shall not swipe/sign no more than six (6) minutes before the start of each shift and swipe out no later than six (6) minutes after the shift ends.
- All employees should be familiar with HR Policy 6.25:
  KRONOS Timekeeping and Exception Time
- KRONOS Exception Logs are to be used (prior to the end of the shift) anytime worked hours are different from the original schedule or anytime there is a missed swipe
- All CTO requests are to be entered in Kronos
  - CTO may be entered manually
- If employees work outside of their cost center, we call it a transfer
- Approvals
  - Both the manager and the employee approve timecard
  - We want to be proactive and minimize errors

# The Payroll Process

## Purpose

The application automates the payroll process, ensuring that the payroll is processed accurately and on time.

1
- HR System sends employee data to Workforce Timekeeper

2
- Employee Schedules entered

3
- Employee time is collected and sent to Workforce Timekeeper

4
- Employees approve timecard

5
- Managers apply approvals

6
- Payroll signs off timecards

7
- Workforce Timekeeper sends employee hours to HR System

8
- Payroll runs

# Roles and Responsibilities

## Purpose

Each employee and manager has responsibilities that are important in the payroll process. Each person's role determines his or her responsibilities and the tasks that he or she performs in the application.

## Common Employee Tasks

On a daily basis, employees perform the following tasks:

- Enter time data using a device (clock) or web
- Transfer time to a different department
- Request time off
- Approve Time

## Common Manager Tasks

On a daily basis, managers perform the following tasks:

- Check for missing punches and other exceptions
- Handle unexpected absences and missed time
- Enter non-worked time for employees
- Make schedule changes
- Review overtime

On a pay period or as needed basis, managers perform the following tasks:

- Schedule employees for a specific time period
- Monitor timecards to facilitate payroll processing
- Review timecards for completeness and approval
- Approve timecards for payroll processing

## Common Payroll Department Tasks

On a pay period or as needed basis, typical payroll tasks include:

- Update historical information
- Sign off timecard totals
- Extract time data from the application to send to the payroll system

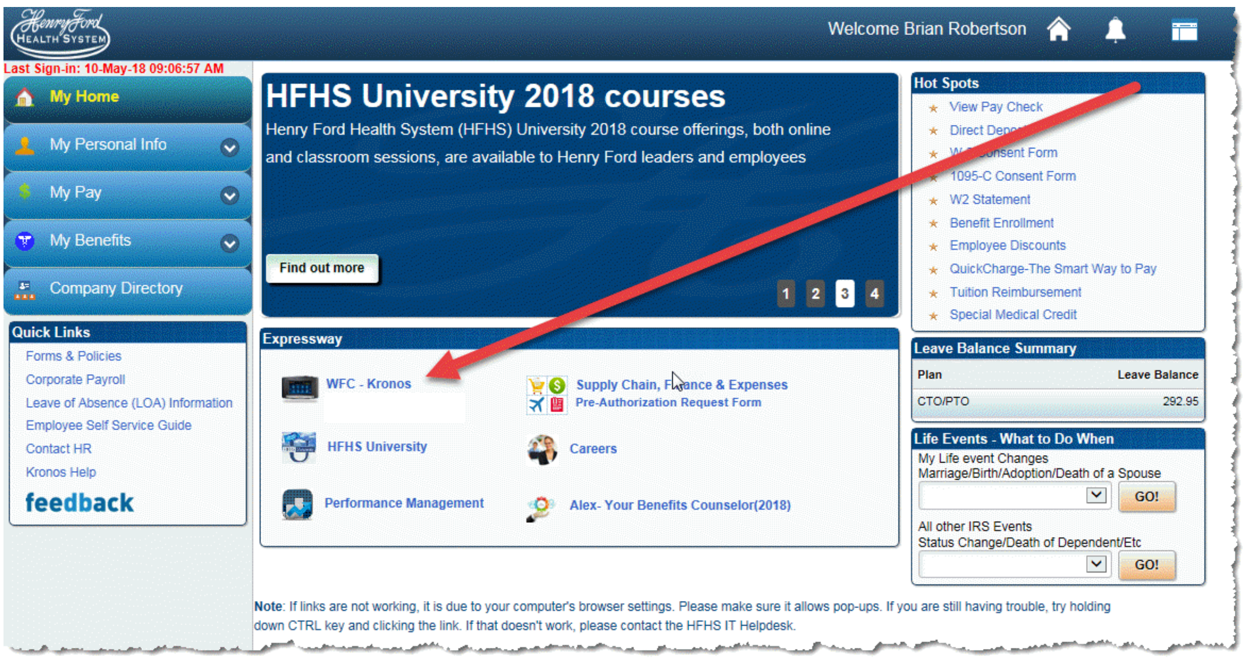
# Logging On – Single Sign-On

## Purpose

Workforce Central is accessed via the Expressway in Manager/Employee Self-Service. There is no additional ID/password needed for Kronos Workforce Central where you to perform your time and attendance tasks.

## Example

You, as the department Manager, log on to the Workforce Timekeeper application at least once a day to review and work with your employees' timecards and scheduling data.




| Steps | |
|---|---|
| 1 | Access the Employee and Manager Self-Service log in page. |
| 2 | Enter your user name and password in their designated fields. |
| 3 | Click the **Kronos** link in the *Expressway*. |

### Business practice

If you or an employee using Kronos forgets your Employee and Manager Self Service user name or password, contact the IT Help Desk.

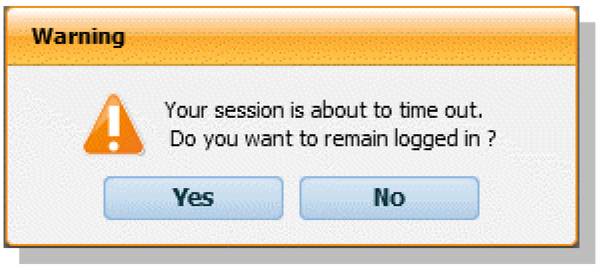
# The Inactivity Timeout and Logging Off

## Purpose

The application provides security to prevent other people from accessing your information. It also helps keep your employees' information confidential.

## Regaining Access after the Inactivity Timeout

If you do not log out and the application does not detect activity within a specific amount of time, the application times out. The inactivity timeout protects sensitive information in the application. Shortly before the application times out, you will be prompted to click Yes to continue working or No to log out. You no longer will need to enter your password to stay in the application.




**Business practice**

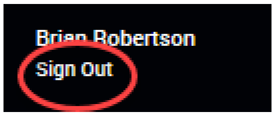
The inactivity timeout screen appears if there is no activity for 30 minutes.

**Caution**

If you do not log in after an inactivity timeout, you will lose all unsaved edits.

## Signing Out of Workforce Timekeeper

Upon completion of your tasks, you must sign out of the application to ensure that your employees' information remains confidential.




**Caution**

Clicking the Close (X) button without first signing out can leave your connection to the application open, which might allow unauthorized people to view and edit information.

# Navigating Kronos

## Navigating

### The key areas of Kronos

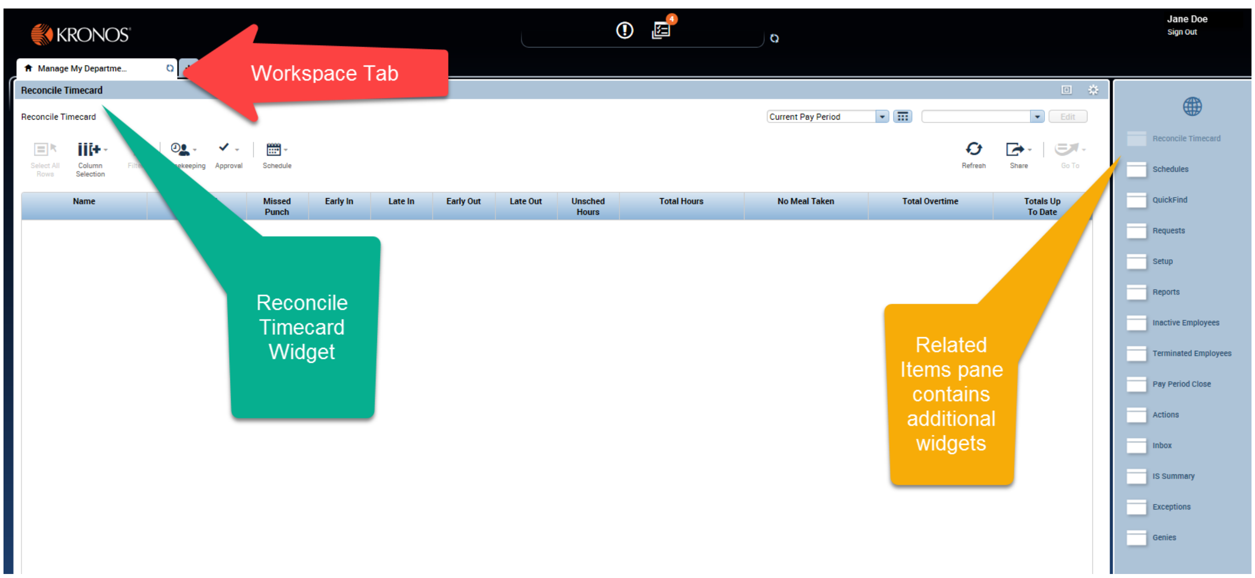
Tabs at the top refer to a workspace. A workspace contains a set of tools related to a certain aspect of your job. Additional workspaces can be displayed in the workspace carousel. Within a workspace are widgets. A widget contains information and/or functionality for you to perform tasks in Kronos.

The Reconcile Timecard Genie displays by default in the Manage My Department workspace.  The name of the Genie reflects a common task.

Additional widgets are stored in the Workspace's Related Items pane. Select a widget for it to display as its own tab. Click the X in the tab to close it. The default workspace, Manage My Department, cannot be closed.

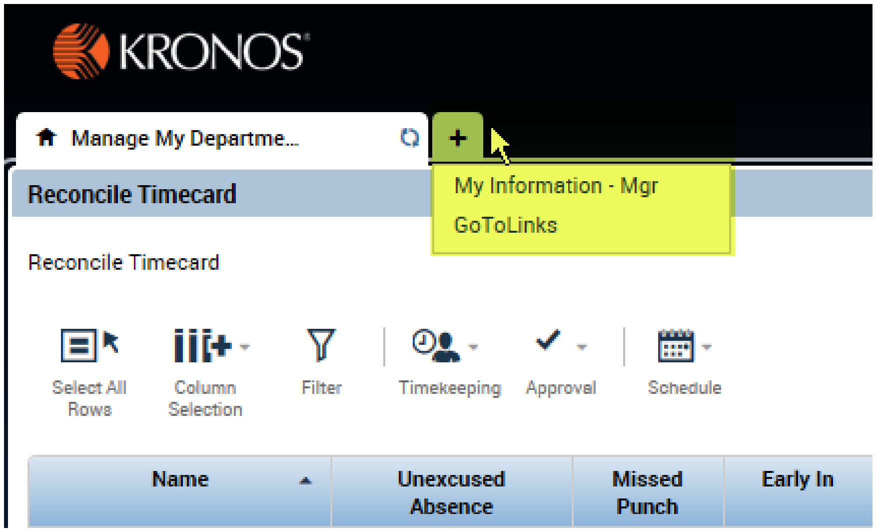
Collapse the Related Items pane for additional real-estate by clicking its arrow. Hover over any item to display its name

Refresh any workspace by clicking the double arrows...

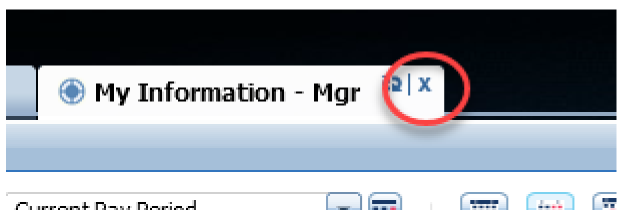


## Using the New Workspace Menu

You can navigate to additional workspaces using the New Workspace Menu. When you click the + (plus sign) tab, available workspaces display. Click one to open it.




Use the X in the tab of a workspace to close it.



## Using the Tools within the Workspace

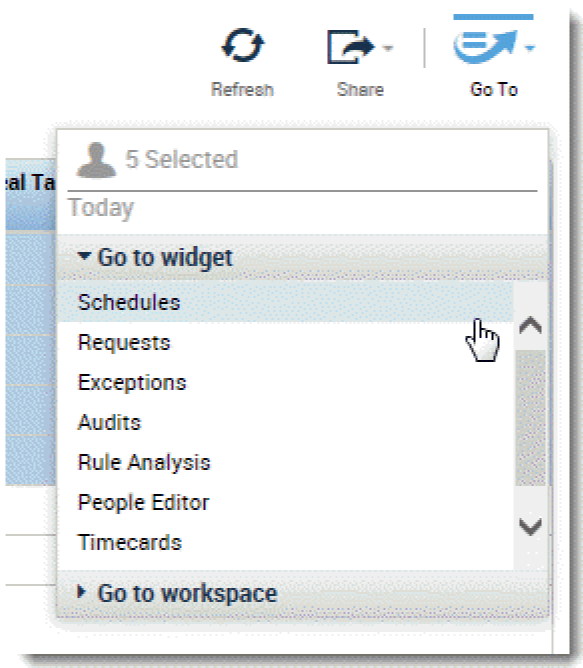
The **Show** hyperfind box (unlabeled) allows you to display a group of employees. When you log on, the default setting for the Show box is All Home, which displays all employees in your cost center(s). You can use the Show box to refine your selection further to include employees in a specific group, such as only those employees who work in a particular area or on a particular shift.

Note: There are special hyperfinds for: Inactive, Terminated, and Transferred In employees.

The **Time Period** box (unlabeled) allows you to specify the timeframe you want to view, such as the current pay period or a particular timeframe in the past, present, or future. The time period you select controls what you will see on that page.


Refresh, Share, and GoTo buttons are located at the top right of most workspaces. Use the Share button to print or export the current workspace to Excel.

Use the GoTo button to access information specific to one or more employees. For example, you can select one employee and click the Timecard item in the GoTo list. to access his or her timecard. Or, you can select multiple employees and click the Schedule item in the GoTo list to view schedules for just those employees whom you selected.



## On Your Own – Structured Practice – Navigating Kronos

- Click the Workspace tab (Manage My Departments)
- Click the New Workspace Menu
- Select the My Information – Mgr item
- Close the My Information – Mgr workspace
- Collapse the Related Items pane
- Hover over the 2nd item and read the name
- Expand the Related Items pane
- Select the Schedules item in the Related Items pane
- Close the Schedules workspace tab
- Select Reconcile TimeCard from the Genies widget
- Set the Time Period box to Current Pay Period
- Set the Show box to All Home
- Click the Select All Rows button
- Use the GoTo button to see everyone's timecard
- Sign Out of Kronos

# Scheduling Employees

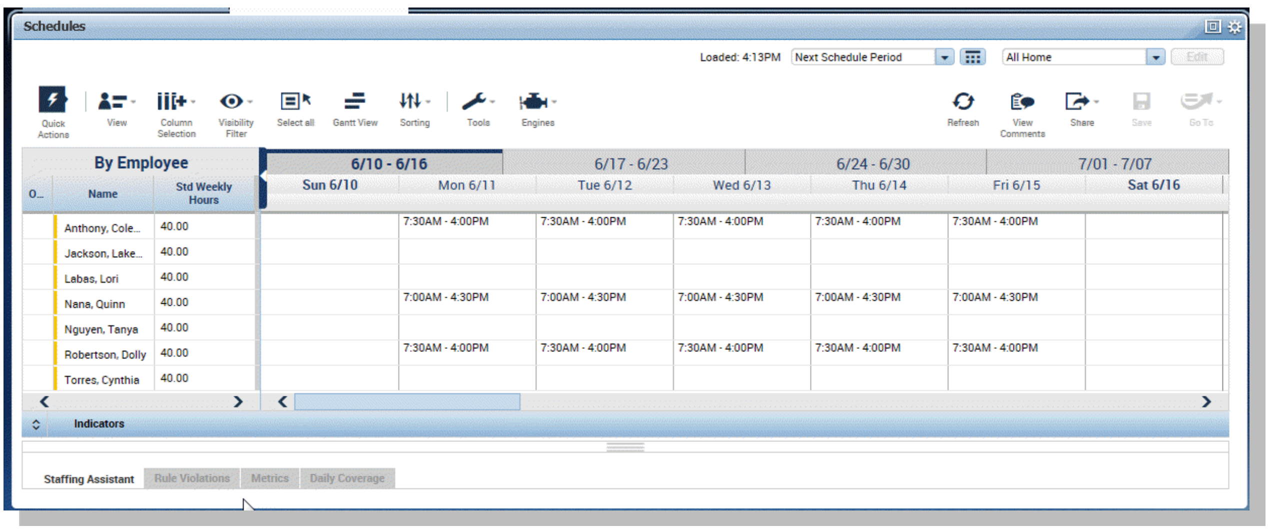
## Navigating the Schedule

### Purpose

Kronos includes the Schedule where you arrange worked and non-worked hours.

Using the Schedule, you can:

- Build patterns
- Add, edit, and delete individual shifts
- Add pay codes for non-worked hours
- Schedule labor (cost center) transfers




| Areas | Description |
|---|---|
| Name column | Lists the employee names. |
| Std Weekly Hours | Displays the total number of hours employee should be scheduled for each week. This number determines part-time/full-time, etc. |
| Date cells | For each day in the selected time period, displays shift start and end or shift label (Advanced Schedulers only). A date cell can also display pay codes to identify scheduled non-worked hours. |
| Indicators | Displays various totals such as Employee Count and Hours Summary for the selected for each date displayed in the selected time period. |
| Left Menu | Additional display features and schedule editing methods |
| Quick Actions | Expands and collapses specific tools for editing schedules |
| Right Menu | Tools to Refresh, View Comments, Export to Excel/Print, Save, and GoTo |
| Time Period | Unlabeled dropdown to select time |
| Show | Unlabeled dropdown to select people |

| Areas | Description |
|---|---|
| Dates at Top of grid | Select to zoom in and out of the schedule. Current selection has blue bar. |

## On Your Own – Structured Practice – Navigating Schedules

- Select Schedules from the Related Items Pane
- Change the time period to Next Schedule Period
- Display the Quick Actions
- Hide the Quick Actions
- Display the Indicators
- Hide the Indicators
- Click on the first Monday to expand that day
- Click on the first week to display 1 week
- Click on the first week to display 4 weeks
- Close the tab

# Refreshing and Saving Data

### Purpose

When you add and modify schedule data, the application displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can cancel your edits if necessary.

### Visual Indicators

When you edit a schedule, the save button turns orange to let you know that your edits are not yet saved. After you save, the visual indicators no longer appear.

### Canceling Edits

The application does not save your edits until you tell it to do so. Until that time, you can remove or cancel your edits using the Refresh button. When you click Refresh, the application re-displays the most recently saved information, overwriting all of your unsaved edits.

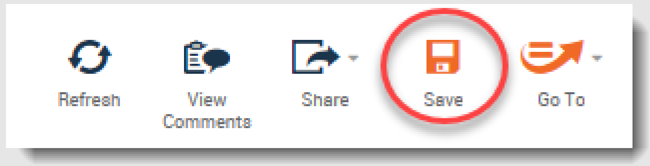
### Saving Edits

When you are satisfied with your edits, you must save them. If you close the employee's schedule before you save the edits, they are not saved.

### Canceling Edits

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Perform your edits to a schedule. Note the visual indicators that indicate unsaved data.</td><td rowspan="3">
</td></tr>
<tr><td>2</td><td>Click Refresh and review the schedule information.</td></tr>
<tr><td>3</td><td>Do you want to cancel your changes?<br>• To cancel your changes, click Yes<br>• To keep your changes, click No</td></tr>
</table>

## Saving Edits

| Steps | | |
|---|---|---|
| 1 | Perform your edits to a schedule. Note the visual indicators that identify unsaved data. |  |
| 2 | Click **Save**. | |
| 3 | Review the employee's schedule to ensure that the visual indicators no longer appear, thereby validating that your information was saved. | |

**Tip**

You can enter time using either 12-hour or 24-hour time formats. For example, you can enter 8:00 A.M to 5:00 P.M. as 0800-1700 or 8a-5p.

Time displays in 12 hour format regardless of how it is entered.

You can also copy and paste shifts using Ctrl-C and Ctrl-V.

## On Your Own – Structured Practice – Cancelling/Saving Edits

- Add a 7:00am – 3:30pm shift to the first Monday for the first person
- Note the Orange save button
- Use the Refresh button.
- Add a 7:00am – 3:30pm shift to the first Monday for the first person
- Note the Orange save button
- Save the schedule
- Delete the shift you just added
- Note the Orange save button
- Save the schedule
- Note the change to the Save button

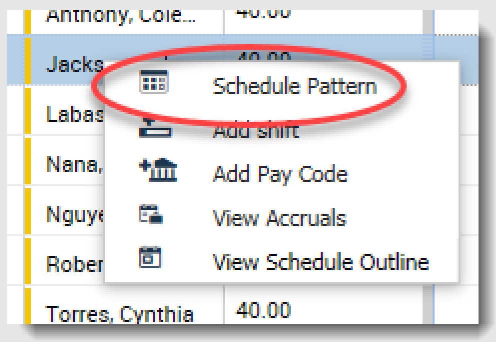
# Creating Schedules Using Pattern Templates

## Purpose

Schedule patterns let you quickly apply a set of shifts to employees who work the same shifts on a regular basis. A schedule pattern consists of one or more shifts that repeat over a specified time period. When you create schedules for employees who have a schedule pattern, you can add the shift days and times manually or use a predefined pattern template. The pattern template defines the pattern of the shifts' days and times and makes it easier and faster for you to create the employees' schedules.

## Example

You want to schedule an employee to work 8:00 A.M. to 4:30 P.M. Monday through Friday every week, starting Sunday of the next schedule period. You know that a pattern template exists that defines this schedule pattern, so you will use it because it is easier and faster than adding the schedule manually.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Access the Schedule.</td><td rowspan="4">
</td></tr>
<tr><td>2</td><td>Select the specific set of employees and the Time Period.</td></tr>
<tr><td>3</td><td>Right-Click the name of the employee who you will schedule using a pattern template.</td></tr>
<tr><td>4</td><td>Select Schedule Pattern.</td></tr>
</table>

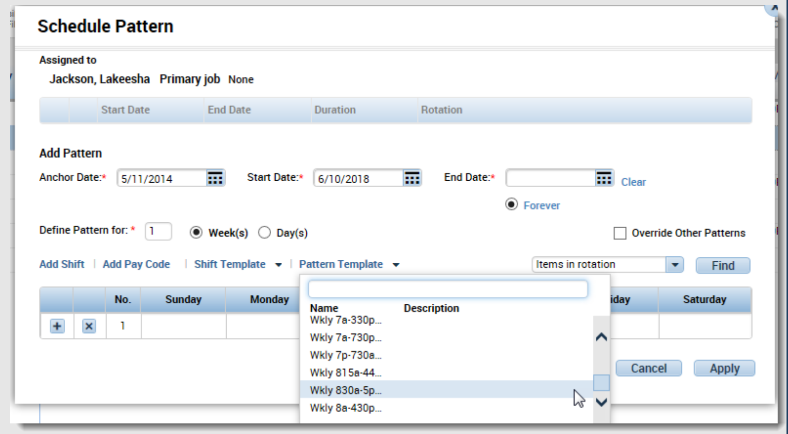
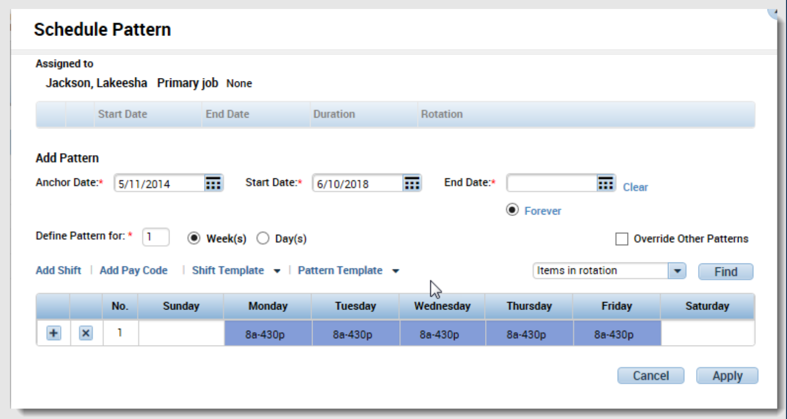
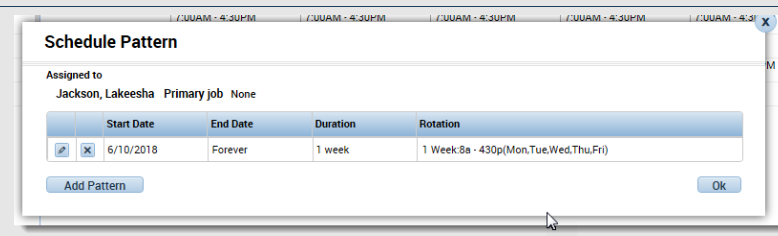
### Define the following terms:

**Shift:** ______________________________________________

**Pattern:** ______________________________________________

**Template:** ______________________________________________

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>Click Pattern Template.</td><td rowspan="2">
</td></tr>
<tr><td>6</td><td>Select a pattern from the list.</td></tr>
<tr><td>7</td><td>From the Start Date calendar icon, specify the date on which the employee(s) starts working the pattern.</td><td rowspan="3">
</td></tr>
<tr><td>8</td><td>From the Anchor Start calendar icon, specify the date on which the pattern starts.</td></tr>
<tr><td>9</td><td>From the End Date calendar icon, specify the last date that the pattern will be effective. To have the pattern in effect with no end date, select Forever.</td></tr>
<tr><td>10</td><td>Click Apple and then click OK.</td><td rowspan="2">
</td></tr>
<tr><td>11</td><td>Click Save.</td></tr>
</table>

### Business practice

Always look for a pattern template first when scheduling employees with schedule patterns. If a pattern template is not available, contact your administrator.

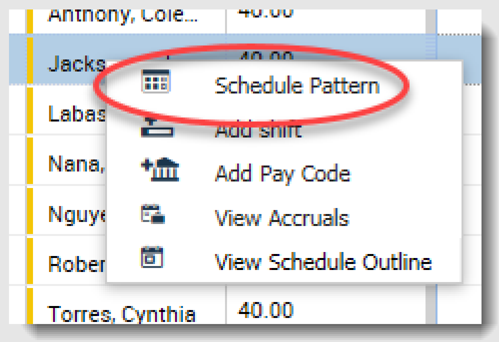
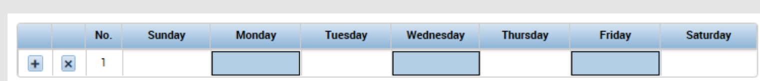
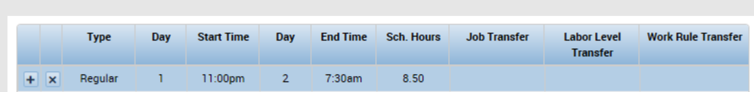
# Creating Schedule Patterns without Pattern Templates

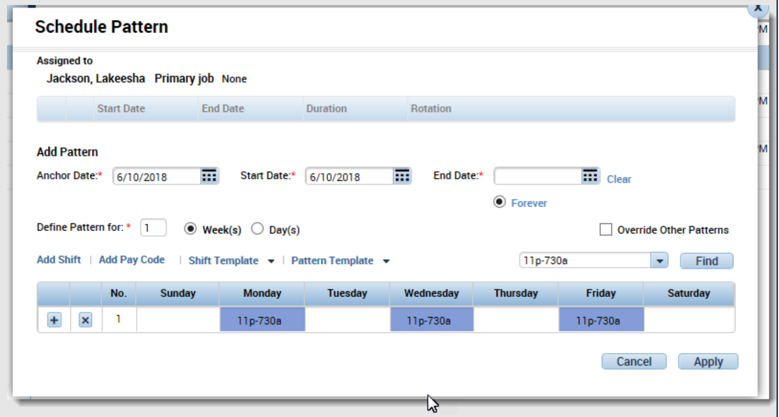
## Purpose

If a pattern template does not exist, you can create a schedule pattern manually and apply it to one or more employees as you create it. The application, however, does not save the schedule pattern as a pattern template, so you cannot assign it to employees later. You would need to create it again manually.

## Example

One of your employees is scheduled to work Monday, Wednesday, and Friday from 11:00 P.M. to 7:30 A.M. Even though there is no pattern template for this schedule, you know that it is quicker to create the schedule using a schedule pattern than to schedule each day separately.

| Steps | | |
|---|---|---|
| 1 | Access the **Schedule**. |   |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Right-Click the name of the employee who you will schedule using an ad-hoc pattern. | |
| 4 | Select **Schedule Pattern.** | |
| 5 | Set the **Define Pattern for** field to the correct interval, for example, days or weeks, and the number of days or weeks the pattern repeats. |   |
| 6 | Click the cell of the each day that applies to the schedule pattern. To select multiple days hold the **Ctrl** key and click the appropriate cells. |   |
| 7 | Click **Add Shift**. | |
| 8 | Enter the shift start and end times in the designated fields and click **Apply**. |   |

| | | |
|---|---|---|
| 9 | From the **Anchor Date** calendar icon, specify the date when the pattern starts. Note: this should be a **Sunday**. |  |
| 10 | From the **Start Date** calendar icon, specify the date when the employee(s) starts working the pattern. Note: this should be a **Sunday**. | |
| 11 | From the **End Date** calendar icon, specify the last date that the pattern is effective. To have the assignment in effect with no end date, select **Forever**. | |
| 12 | (Optional) To replace all other assigned schedule patterns with the new schedule pattern, select the **Override other patterns** check box. | |
| 13 | Click **Apply, OK** and then click **Save**. | |

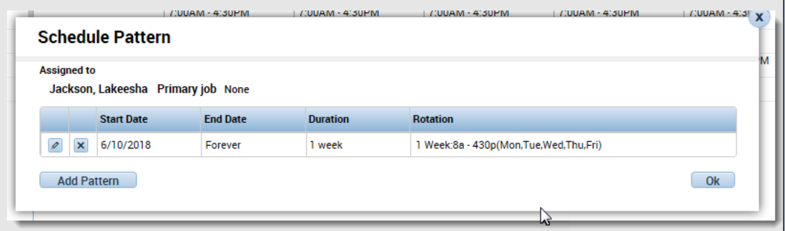
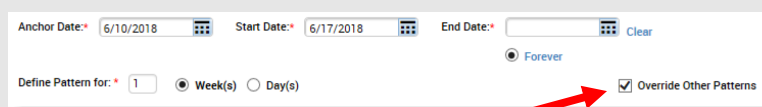
# Updating Schedule Patterns

## Purpose

From time to time, employees' regular schedule patterns might change for reasons such as workload changes, status changes, or terminations. When you need to change an employee's schedule pattern, you can override the existing pattern(s) to adjust for the changed circumstances.

## Example

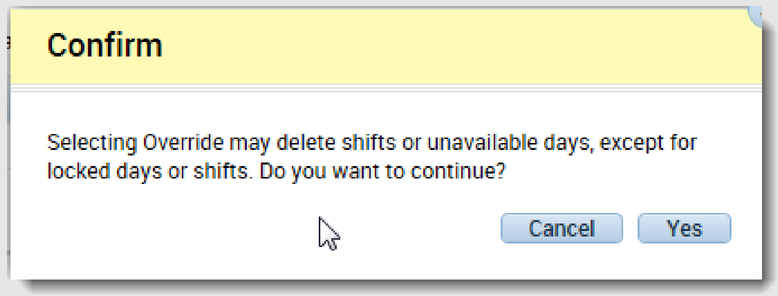
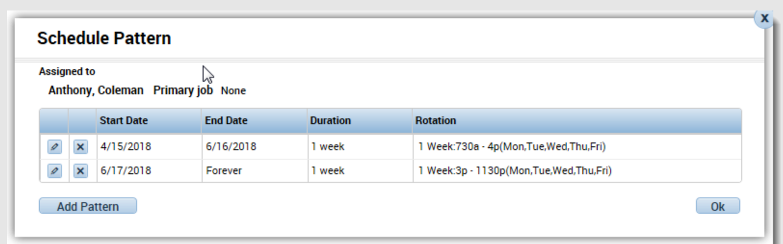
An employee will now be working 3:00 P.M to 11:30 P.M. on Monday -Friday. You assign the new pattern and override the old pattern as of the 2nd Monday of the next schedule period.

| Steps | | |
|---|---|---|
| 1 | Access the **Schedule**. |  |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list | |
| 3 | Right-Click the name of the employee whose schedule pattern is changing and choose **Schedule Pattern**. | |
| 4 | Select **Add Pattern** | |
| 5 | From the **Anchor Date** calendar icon, specify the date when the employee(s) starts using the new schedule pattern. Note: this should be a **Sunday**. |  |
| 6 | From the **Start Date** calendar icon, specify the date when the new schedule pattern starts. Note: this should be a **Sunday**. | |
| 7 | From the **End Date** calendar icon, specify the last date that the pattern is effective. To have the assignment in effect with no end date, select **Forever**. | |
| 8 | Select the **Override other patterns** check box. | |





| Steps | | |
|---|---|---|
| 6 | Use one of the following options to enter the new shift pattern:<br>• Enter the shift start and end times in each applicable cell.<br>• Click the applicable cells, click **Shift Template** and select the shift template.<br>• Click the applicable cells, click **Add Shift**, define the shift attributes, and click **Apply**.<br>• Click **Pattern Template** and select the pattern. | |
| 7 | Click **Apply**. | |
| 8 | Click **Yes** when you see the message about Confirming 'Override.' |  |
| 9 | Click **OK.**<br>Then click **Save**. |  |

### Tip

To update a pattern, it's easiest to follow the steps as if you were going to assign a new pattern and select the **Override other patterns** check box. The old pattern will be overridden as of the new work start date.

To end an employee's pattern without replacing it with a new pattern, right-click on the employee's name and select **Schedule Pattern**. Use the **Pencil Icon** next to the pattern that is ending to edit that pattern. Select **End Date** and enter the last date the pattern will be active.

# Adding Shifts with (Full Day) Transfers

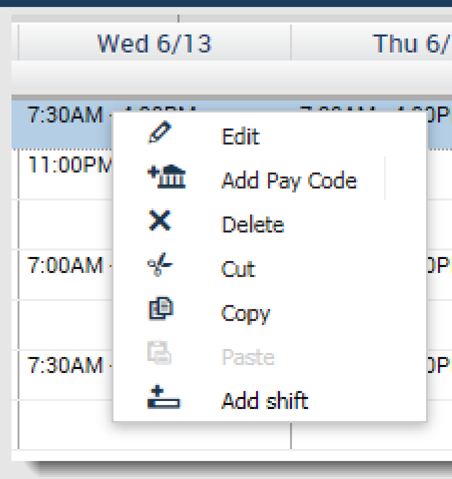
***** See Performing Additional Manager Tasks for On Call work rule transfers *****

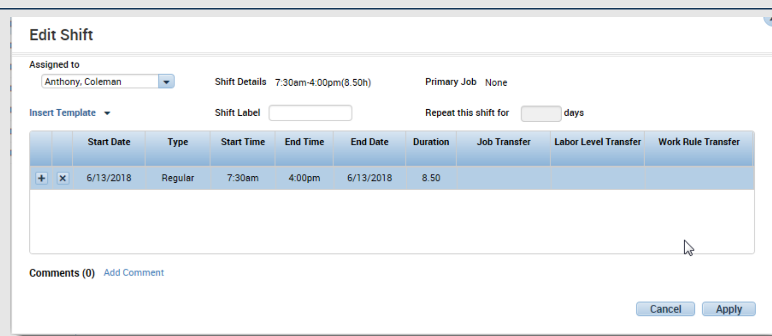
### Purpose

Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule. You need to record the transfer in the application so that the right labor account is charged and the right work rule is applied. Transfers can be made when either adding a new shift or editing an existing shift.

### Example

On Wednesday of the next schedule period, you need an employee to work her entire shift in a different cost center. Schedule the employee to work in the other cost center from 7:30 A.M. to 4:00 P.M. on Wednesday of the next schedule period.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Access the Schedule.</td><td rowspan="4">


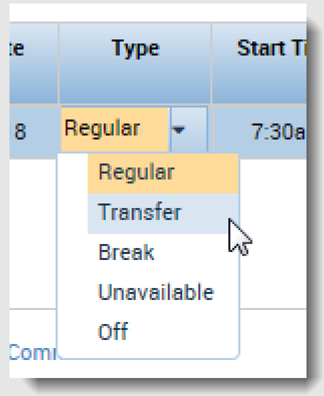
</td></tr>
<tr><td>2</td><td>Select the specific set of employees from the Show drop-down list. Select the specific time period from the Time Period drop-down list.</td></tr>
<tr><td>3</td><td>Right-Click the employee’s cell in the row and below the date where you want to add/edit a shift that requires a transfer.</td></tr>
<tr><td>4</td><td>Select Edit when changing the transfer settings of an existing shift.<br><br>Select: Add Shift when adding a new shift that is a transfer.</td></tr>
<tr><td>5</td><td>In the Edit Shift window: Confirm/enter the correct date in the Start Date field.</td><td>


</td></tr>
</table>

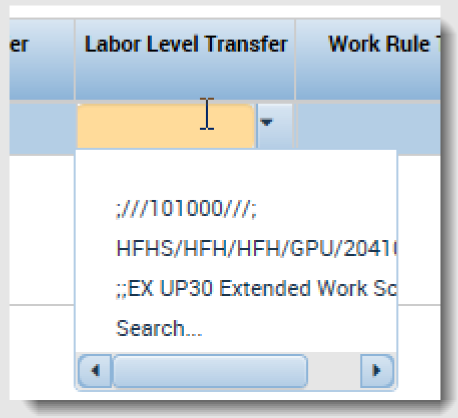
 

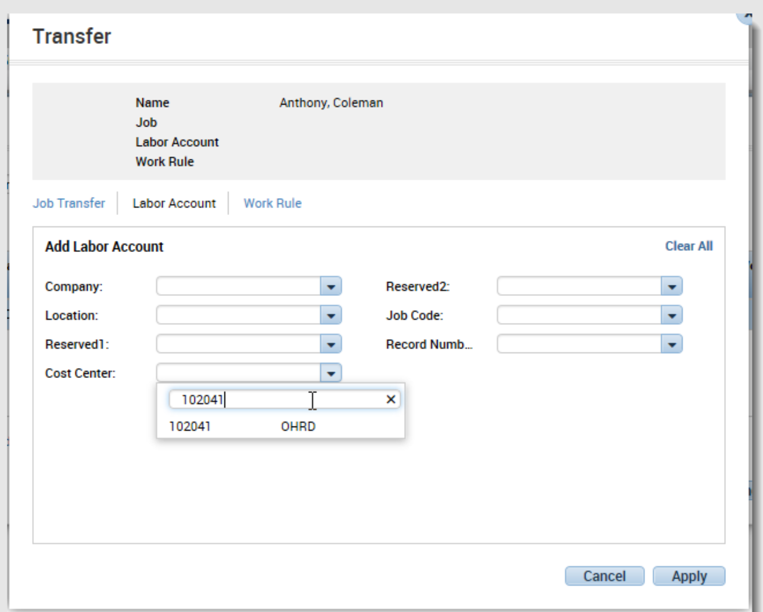
## Steps

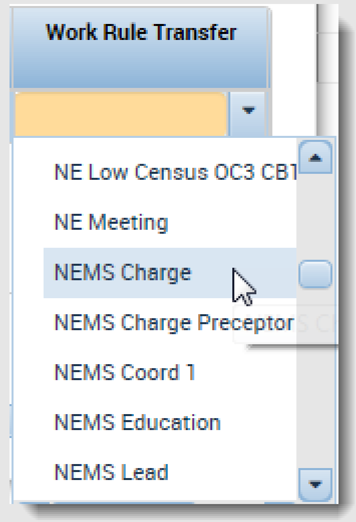
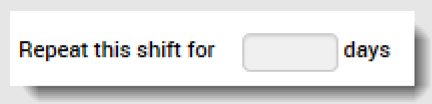
| | |
|---|---|
| 6 | From the **Type** drop-down list, select the Transfer shift type. |
| 7 | In the **Start Time** field, confirm/enter the time the shift starts and press **Tab**. |
| 8 | In the **End Time** field, confirm/enter the time the shift ends and press **Tab**. |
| 9 | Confirm/enter the correct date in the **End Date** field. If the shift crosses a day divide, change the shift's end date to the following day. |




| | |
|---|---|
| 10 | What kind of transfer(s) do you want to perform? |
| | • Transfer hours to another labor account (i.e. Cost Center): Click the **Labor Level Transfer** drop-down list and select **Search.**<br>• Enter a value in the appropriate **Transfer** level field or select a value from the level drop-down list.<br>• Then click **Apply**.<br>(Note: **Job Transfer** is utilized by Advanced Scheduling units, typically inpatient nursing.) |



| Steps | | |
|---|---|---|
| | • Transfer hours to another work rule (i.e. Charge Nurse, Preceptor, Orientation, OnCall etc.):<br>• Click the Work Rule Transfer drop-down list and select the appropriate value.(See Prefixes below).. |   |
| 11 | Click **Apply**. | |
| 12 | (Optional) In the **Repeat this shift for [blank] days** field, enter the number of consecutive days that you want the transfer to last. |   |
| 13 | Click **Save** | |

| Visual Indicator | Definition |
|---|---|
| (x) | Labor account transfer associated with a shift |
| *(work rule)* | Work rule transfer associated with that shift |

## <u>Prefixes to Alternate Work Rules</u>

| | |
|---|---|
| EX UP30 | Exempt, unpaid 30 min lunch |
| NEMS | Non –exempt, Market Sensitive, Inpatient Nurse |
| NENSNW | Non-exempt, No shift, No weekend |
| NE | Non-exempt, with weekend/shift premiums |
| NENS | Non-exempt, No shift |

# Adding Shifts with (Partial Day) Transfers

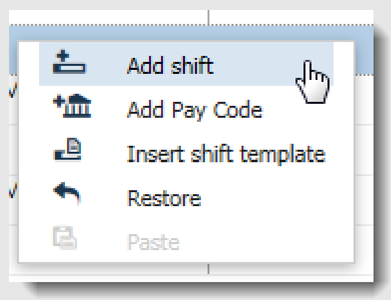
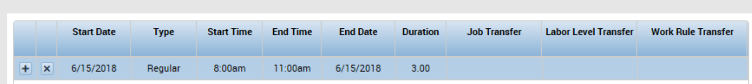
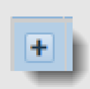
***** See Performing Additional Manager Tasks for On Call work rule transfers *****

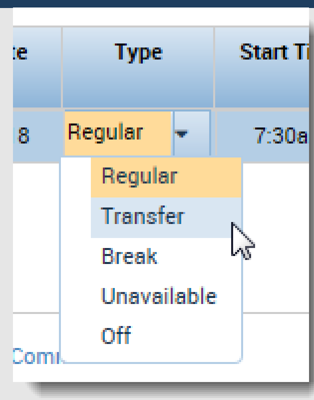
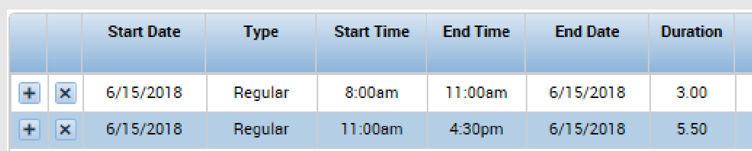
## Purpose

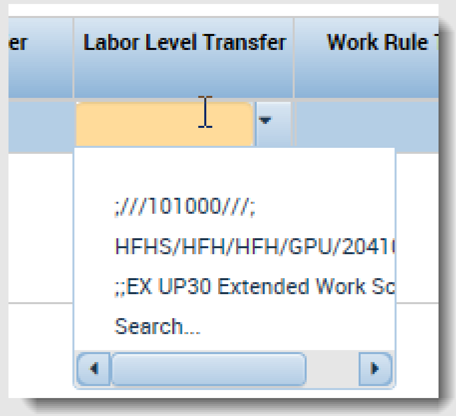
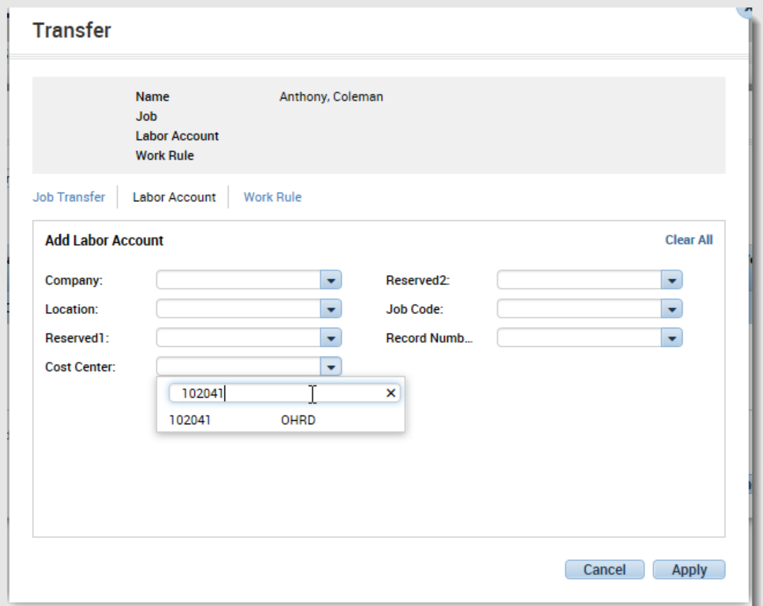
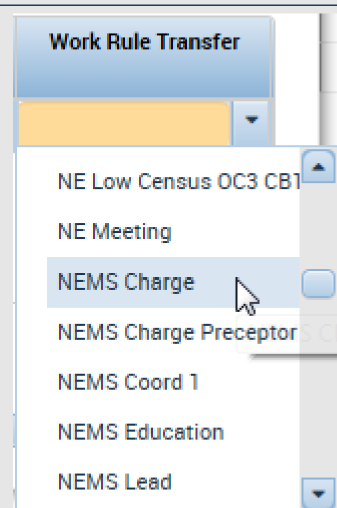
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer an employee to another labor account or work rule for part of his or her shift. You need to note the transfer in the application so that the right labor account is charged and the right work rule is applied. Transfers can be made when either adding a new shift or editing an existing shift.

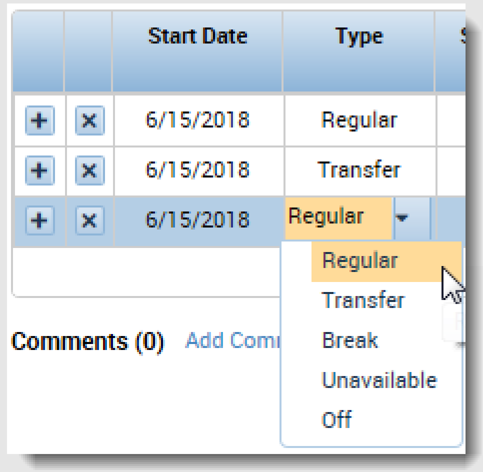
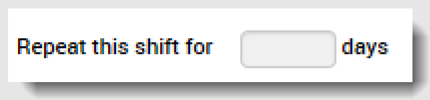
## Example

You need to schedule an employee to work hours in two different cost centers on Friday of the next schedule period. You want the employee to work in her home cost center from 8:00 A.M. to 11:00 A.M. and then the other cost center from 11:00 A.M. to 4:30 P.M. Schedule an employee to work part of her shift (from 8:00 A.M. to 11:00 A.M.) in her home cost center and then the remainder of her shift (from 11:00 A.M. to 4:30 P.M.) in the other cost center on Friday of the next schedule period.

| Steps | | |
|---|---|---|
| 1 | Access the **Schedule**. |  |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the desired time period from the **Time Period** drop-down list. | |
| 3 | **Right-Click** the employee's cell in the row and below the date where you want to add/edit a shift that requires a transfer. | |
| 4 | Select **Add Shift**. | |
| 5 | In the Edit Shift window, confirm the correct date in the **Start Date** field. |  |
| 6 | For the hours that the employee is scheduled to work before the transfer, fill in the **Start Time** and the **End Time** fields. | |
| 7 | Click the **Insert Row** icon. |  |

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>8</td><td>From the Type drop-down list, select the Transfer shift type.</td><td>
</td></tr>
<tr><td>9</td><td>In the Start Time field, confirm the time that the shift transfer begins and press Tab.</td><td rowspan="3">
</td></tr>
<tr><td>10</td><td>In the End Time field, enter the time that the shift transfer ends and press Tab.</td></tr>
<tr><td>11</td><td>Confirm that the date in the End Date field is correct. If the shift crosses the day divide, change the shift’s end date to the following day.</td></tr>
</table>

| Steps | | |
|---|---|---|
| 12 | What kind of transfer(s) do you want to perform?<br>• Transfer hours to another labor account (i.e. Cost Center): Click the **Labor Level Transfer** drop-down list and select a value from the list or select **Search.**<br>• Enter a value in the appropriate **Transfer** level field or select a value from the level drop-down list.<br>• Then click **Apply**.<br>(Note: **Job Transfer** is utilized by Advanced Scheduling units, typically inpatient nursing.) | <br> |
| | • Transfer hours to another work rule (i.e. Charge Nurse, Preceptor, Orientation, OnCall etc.):<br>• Click the Work Rule Transfer drop-down list and select the appropriate value. |  |

| Steps | | |
|---|---|---|
| 15 | If the employee is scheduled to work hours after the scheduled shift transfer, click the **Insert Row** icon and select the correct type from the **Type** drop-down list. |  |
| 16 | In the **End Time** field, enter the time that the shift ends and press **Tab**. | |
| 17 | (Optional) In the **Repeat this shift for [blank] days** field, enter the number of consecutive days that you want the transfer to last. |  |
| 13 | Click **Apply**. | |
| 18 | Click **Save**. | |

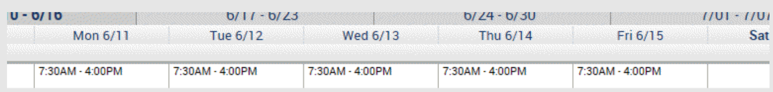
# Editing Scheduled Shifts

## Purpose

When events in employees' lives require them to take time off and when your workload requirements vary, you will need to change employees' schedules. You need to keep the schedules accurate to reduce the number of exceptions that might appear in employee timecards.

## Example

Your workload requirements have changed on Wednesday of the next schedule period, so that you need to change an employee's schedule to satisfy the new requirements.

| Steps | | |
|---|---|---|
| 1 | Access the **Schedule**. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the time period from the **Time Period** drop-down list. | |
| 3 | Locate the employee's row and click the cell in the row and below the date that contains the shift that you want to edit. |  |
| 4 | Edit shift start and/or end times and press **Tab**. | |
| 5 | Click **Save**. | |

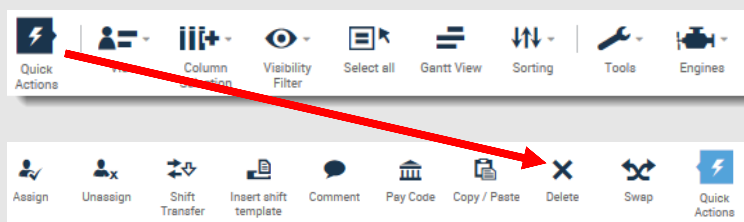
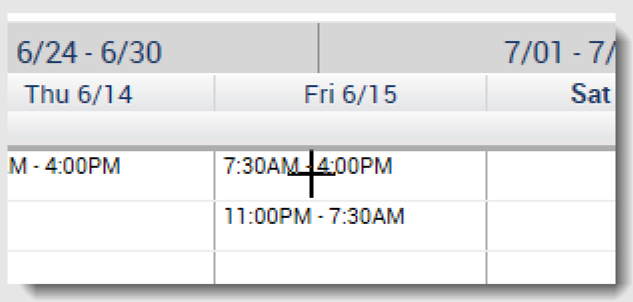
# Deleting Shifts from Employees' Schedules

## Purpose

Employees sometimes are unable to work a scheduled shift. When this happens, you need to delete the shift from the employee's schedule to prevent the application from flagging the employee as absent without an excuse.

## Example

An employee mentioned that she will be unable to work Friday of the next schedule period because she needs to attend her brother's funeral. Access the Schedule and delete the employee's schedule for Friday of the next schedule period.

| Steps | | |
|---|---|---|
| 1 | Access the **Schedule**. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the time period from the **Time Period** drop-down list. | |
| 3 | Click the **Quick Actions** button and select the **Delete** button. |  |
| 4 | Locate the employee's row and click the cell in the row and below the date that contains the shift you want delete. |  |
| 5 | Click **Save**. | |

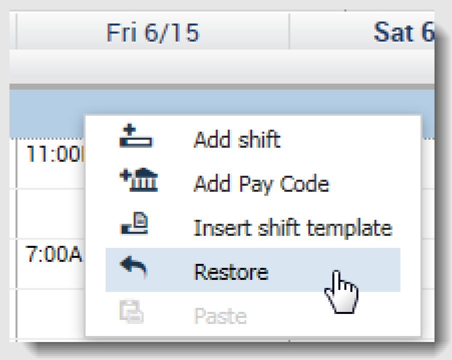
# Restoring Deleted Shifts

## Purpose

If an employee's plans change or a shift was deleted in error, you can restore the shift if it belongs to a pattern. Use the Restore feature on the Right-Click menu to insert the original shift into the employee's schedule.

## Example

An employee's plans have changed so she will be able to work the Friday of the next schedule period after all. Access the Schedule Editor and restore the shift in the employee's schedule for Friday of the next schedule period.

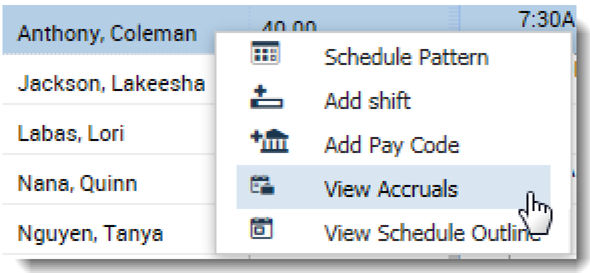
| Steps | | |
|---|---|---|
| 1 | Access the **Schedule**. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the time period from the **Time Period** drop-down list. | |
| 3 | Locate the employee's row and click the cell in the row and below the date where you want to restore the shift. |  |
| 4 | Select **Restore**. | |
| 5 | Click **Save**. | |

# Viewing Accrual Balances in the Schedule Editor

## Purpose

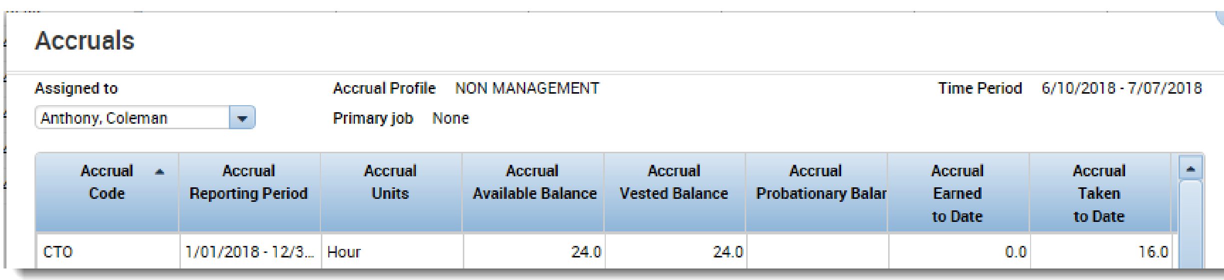
Before you schedule non-worked time, confirm that the employee has accrued enough hours. The Accruals option on the Schedule displays the Accruals Reporting Period data with the employee's CTO time. The balances are accurate as of the last date in the date range.

### Right-Click a Name in the Schedule




## Example

An employee has requested CTO time for Monday and Tuesday of the next schedule. Before scheduling the time off, check the employee's CTO time balance.



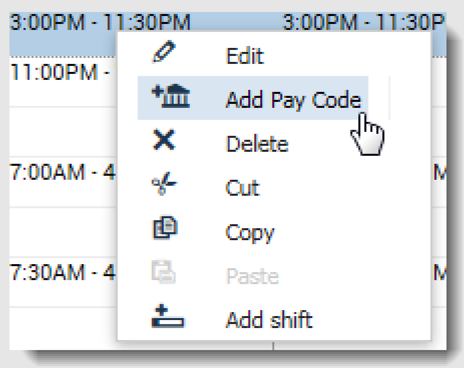
# Scheduling Non-Worked Hours

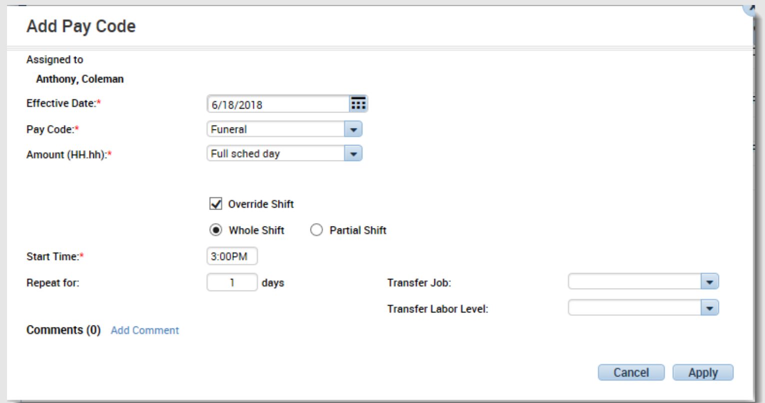
## Purpose

You should schedule your employees' non-worked time when you know about it in advance. Non-worked hours include CTO, Funeral, and Jury Duty. CTO should be requested by the employee using Kronos. Other types of non-worked hours should be added to the schedule manually.

## Example

An employee mentioned that she will be unable to work Monday and Tuesday of the next schedule period because due to a family member's funeral. The employee has requested eight hours of Funeral time for Monday and Tuesday of the next schedule period and you have approved this time. From the Schedule, schedule the employee for two consecutive eight-hour days of CTO time for Monday and Tuesday of the next schedule period using the 'Repeat for [blank] days' option. Make sure that she does not get paid for the scheduled worked hours of 3:00 P.M. to 11:30 P.M. on those days.

| **Steps** | | |
|---|---|---|
| 1 | Access the **Schedule**. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list. |  |
| 3 | Locate the employee's row and **Right-Click** the cell in the row and under the date where you want to schedule non-worked hours. | |
| 4 | Select **Add Pay Code**. | |
| 5 | In the **Effective Date** field, confirm the date selected. (Or, if incorrect, enter the correct date.) | |
| 6 | From the **Pay Code** drop-down list, select the pay code. | |

| Steps | | |
|---|---|---|
| 7 | In the **Amount** field, do one of the following:<br>• To schedule a specific number of hours, enter the amount of hours in the field<br>• To schedule the entire number of hours that the employee is scheduled to work that day, select **full sched day** from the drop-down list<br>• To schedule half of the number of hours that the employee is scheduled to work that day, select **half sched day** from the drop-down list |  |
| 8 | (Optional) If the non-worked hours must replace the employee's existing shift, select the **Override Shift** check box and do one of the following:<br>• To override the employee's entire shift, select Whole Shift<br>• To override part of the employee's scheduled shift, select Partial Shift | |
| 9 | In the **Start Time** field, enter the effective time for the non-worked hours. If the employee already has a schedule, the shift start time is the default. | |
| 10 | In the **Repeat for [blank] days** field, enter the number of consecutive days this edit applies. For example, if the employee has requested five consecutive days, enter 5. | |
| 11 | Click **Apply** and then click **Save**. | |

## On Your Own Practice

1. Open the Scheduler so that you can see all of your employee's for the next schedule period.
2. Assign an employee a reoccurring schedule using a **pattern template** that starts on the first day of the next schedule period.
3. Assign an employee a reoccurring schedule that starts on the first day of the next schedule period. There are no pattern templates that match their pattern so use the **Add Shift** link to insert the appropriate shift times on the appropriate days. You make up the days and the shift times.
4. Start an employee on a new schedule pattern beginning the third week of the next schedule period. Select the new pattern from a template.
5. Schedule an employee for one shift on one day by typing begin and end times.
6. Replace an employee's shift with a Jury Duty Pay Code.
7. Edit a shift for a full day transfer (Labor Level) to cost center 102041.
8. Edit a shift for a part day transfer (Labor Level) to cost center 102041.
9. Edit a shift for a full day transfer to a NEMS Orientation Work Rule.
10. Edit a shift for a part day transfer to a NEMS Education Work Rule.

# Editing Time and Attendance Data

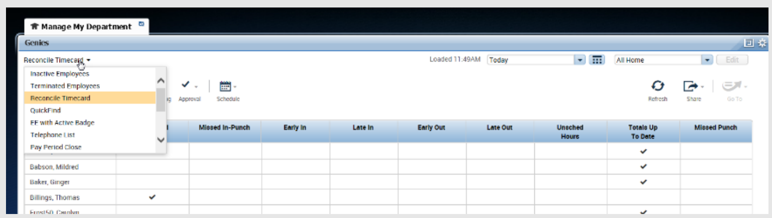
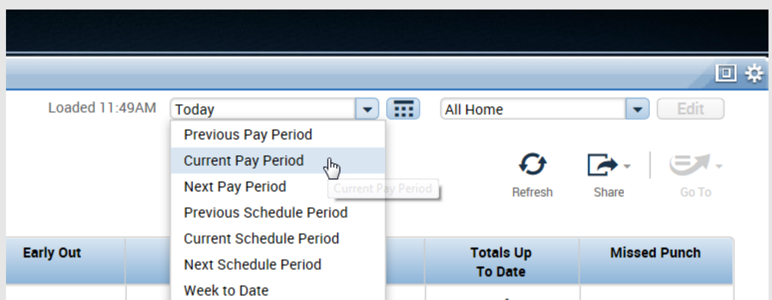
## Accessing Employees’ Timecards

### Purpose

Use Genies to quickly review and monitor employees' time and attendance data. From a Genie, you can open employees’ timecards so that you can make any adjustments prior to payroll processing.

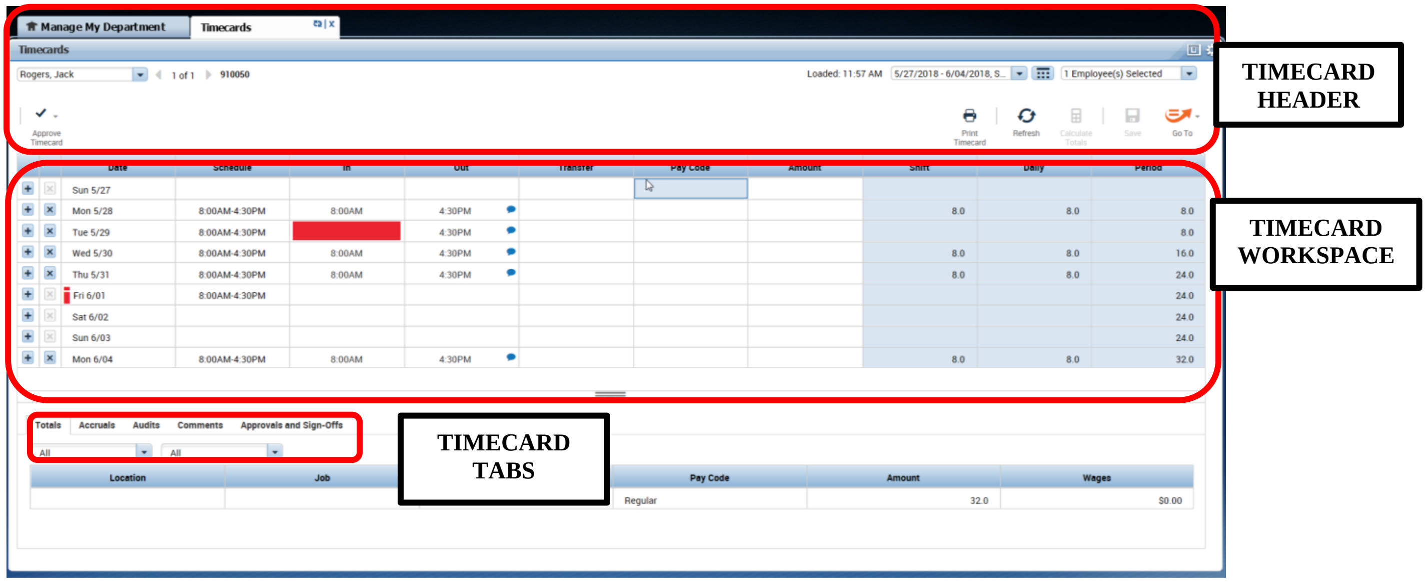
### Example

In reviewing the Reconcile Timecard Genie, you notice that several employees have time and attendance exceptions. You open each employee’s timecard to review and adjust the data.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Access a Genie, such as the Reconcile Timecard Genie.</td><td></td></tr>
<tr><td>2</td><td>Select Reconcile Timecard.</td><td>
</td></tr>
<tr><td>3</td><td>Select the specific set of employees from the drop-down list. Select the correct time period from the Time Period drop-down list.</td><td>
</td></tr>
<tr><td>4</td><td>Double click the name of employee(s) whose timecards you want to review.</td><td></td></tr>
</table>

## Hourly Timecard Overview

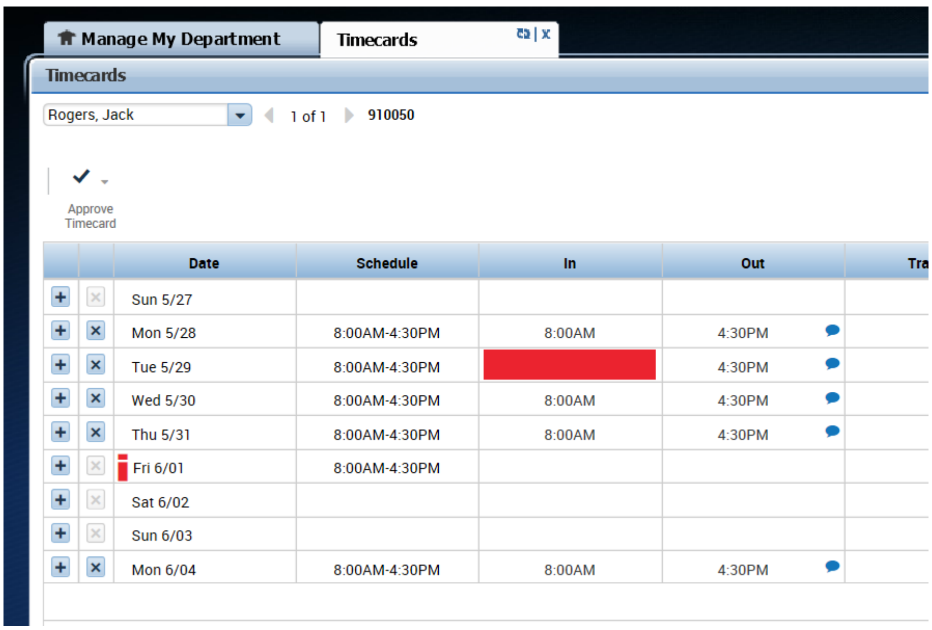
There are three main areas on a timecard; the timecard header, timecard grid, and timecard tabs.




| Timecard Area | Description |
|---|---|
| Timecard header | Located beneath the Banner, the timecard header displays the following information:<br>• Employee's name whose information appears in the timecard workspace and timecard tabs<br>• Employee's identification number<br>• Time Period |
| Timecard workspace | Located in the middle of the page beneath the page header, the timecard workspace displays the following information:<br>• Menu bar that contains selections for performing timekeeping tasks<br>• Grid containing dates for the selected time period<br>• Time entry totals, including shift, daily, and cumulative amounts<br>• **Shift Total** – Calculated total hours of all shifts worked on the selected day (excluding totals for non-shift items such as pay codes)<br>• **Daily Total** – Calculated total hours of the selected day, including pay codes<br>• **Cumulative** – Cumulative total up to and including the selected day<br>• **All** – Calculated total hours for the entire visible time period |

| Timecard Area | Description |
|---|---|
| Timecard tabs | Located at the bottom of the page, the timecard tabs display additional information about how Kronos tracks employee hours. Three default tabs appear:<br>• **Totals**– The first tab at the bottom of the timecard workspace. The area on the left displays the timecard totals. The area on the right displays the Schedule for the selected time period.<br>• **Accruals** – Displays accrual codes and available balances based on the date that you select in the timecard workspace.<br>• **Audits** – Lists all time punch or amount corrections made to an employee’s timecard and approvals made by managers.<br>• **Comments:** Additional tabs will appear based on actions you perform. For example, the **Approvals & Sign Offs** tab appears when you approve an employee’s timecard. |

Visual indicators appear on a timecard when an exception occurs. For example, an employee might forget to clock in or out, which causes a missed punch exception. An employee might clock in early or late, which causes a punch exception.



# Refreshing and Saving Data in Timecards

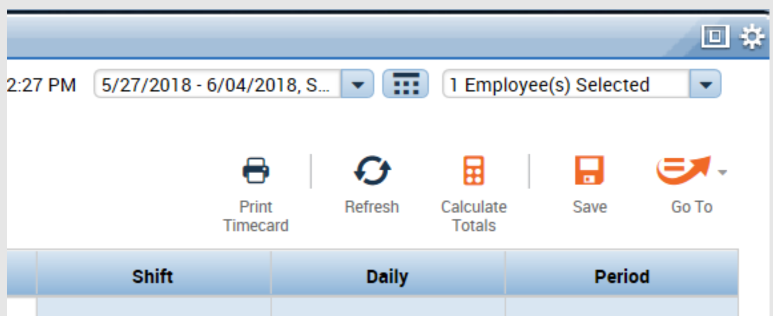
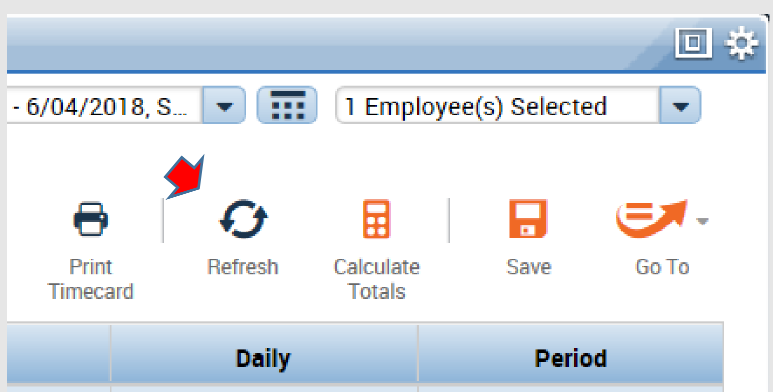
## Purpose

When you add and modify timecard data, the application displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can decide whether the edits are what you want.

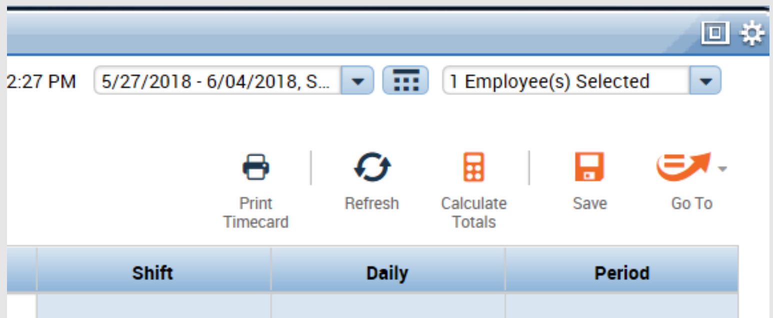
## Example

You have been editing the timecard of one of your employees when you realize that you entered the wrong information. You cancel the edits, enter the correct information, and save the timecard.

## Canceling Edits

| Steps | | |
|---|---|---|
| 1 | Perform one or more edits on a timecard. Notice the visual indicators that signify unsaved data. |   |
| 2 | Select the **Refresh** icon |   |
| 3 | • The current page has unsaved changes. Are you sure you want to proceed?<br>• To cancel your changes, click **Yes**<br>• To keep your changes, click **No** | |

## Saving Edits

| Steps | | |
|---|---|---|
| 1 | Perform one or more edits on a timecard. Notice the visual indicators that signify unsaved data. |  |
| 2 | Click **Save**. | |
| 3 | Review the employee’s timecard to ensure that the visual indicators no longer appear, validating that your information was saved. | |

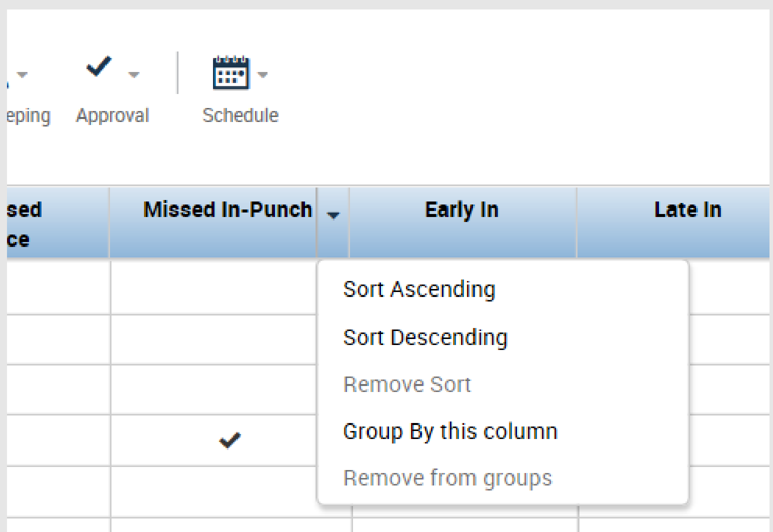
# Adding Missed Punches

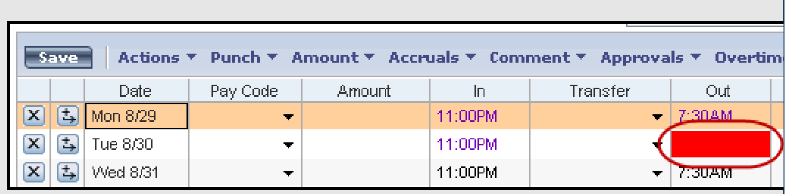
## Purpose

An employee might forget to punch in or out. When this happens, a solid-red box appears in the missed In or Out cell. To add that punch, you click the cell and type the missed time. The application accepts multiple formats for entering punches in a timecard.

## Example

An employee notified you that she forgot to punch in on Monday of the previous pay period. The employee started her shift at 8:00 A.M. From the Reconcile Timecard Genie, access the employee's timecard and add an 8:00 A.M. In punch on the employee's timecard for Monday of the previous pay period.

| Steps | | |
|---|---|---|
| 1 | Access the **Reconcile Timecard** Genie. | |
| 2 | Select the specific set of employees from the drop-down list. Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Sort the **Missed Punch** column in descending order. |  |

| Steps | | |
|---|---|---|
| 4 | Double click the name of employee(s) who have a check mark in the Missed Punch column and access their timecard(s). |  |
| 5 | Click the **In** or **Out** punch cell containing the missed punch exception. | |

| | | |
|---|---|---|
| 6 | Enter the missing times using an acceptable format. | |
| 7 | Click **Save**. | |

**Tip**

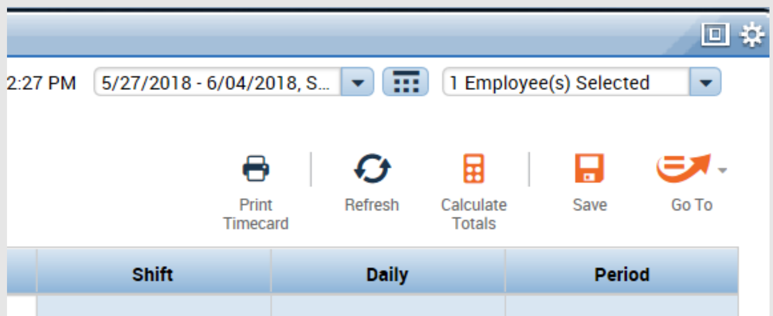
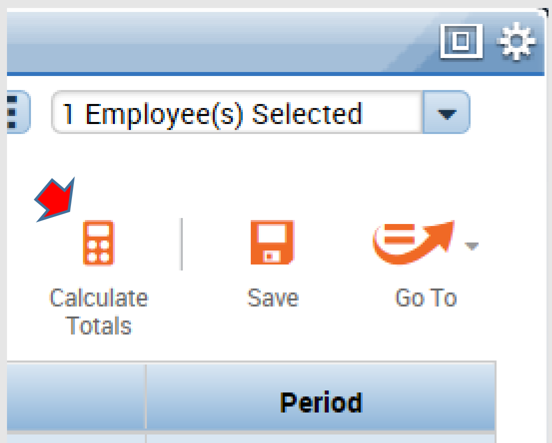
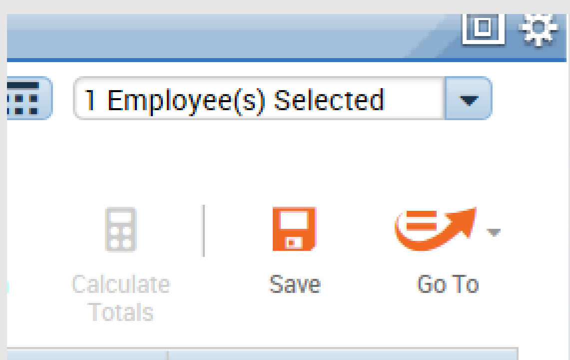
When the Save icon turns orange, the timecard contains unsaved data.

**Business practice**

You must clear all check marks in the Missed Punch column of the Reconcile Timecard Genie.

## Calculating Totals

You can update the Totals for a timecard without saving.  This is handy when you want to double-check how a timecard edit affects the totals before you save it.

| Step | | |
|---|---|---|
| 1 | Display and note the Totals.<br>Add an In and Out punch on a timecard.<br>Notice the visual indicators that signify uncalculated totals AND unsaved data. |  |
| 2 | Select **Calculate Totals**. |  |
| 3 | Note the Totals changes and the Calculate Totals button is gray. However, the Save button still indicates unsaved data. |  |

| Visual Indicator | Description |
|---|---|
| Save icon in orange | Unsaved edits |
| Red flag in the Totals & Schedule tab | Totals are not up-to-date |

# Deleting Punches

## Purpose

As a rule, you should not delete punches from timecards because they represent actual times that employees started and stopped working. However, there are some exceptions to this rule. For example, an employee might punch twice when starting or ending a shift. When this occurs, you will want to delete the extra punch. The Audits tab provides a record of all timecard edits, including any deleted punches.

## Example

An employee could not remember if she punched out at the end of her shift on Monday of the previous pay period. She punched out a second time to ensure that she recorded her end-of-shift time. While reviewing the employee's timecard, you notice that two out punches appear for the employee's end of shift on Monday. You want to delete the employee's second out punch at 4:42 P.M.

From the Reconcile Timecard Genie, access the employee's timecard for the previous pay period and delete the 4:33 P.M. punch for Monday.

| Steps | | |
|---|---|---|
| 1 | In the timecard, click the cell that contains the punch that you want to delete. | |
| 2 | Press the **Delete** key on the keyboard. | |
| 3 | Click **Save**. | |

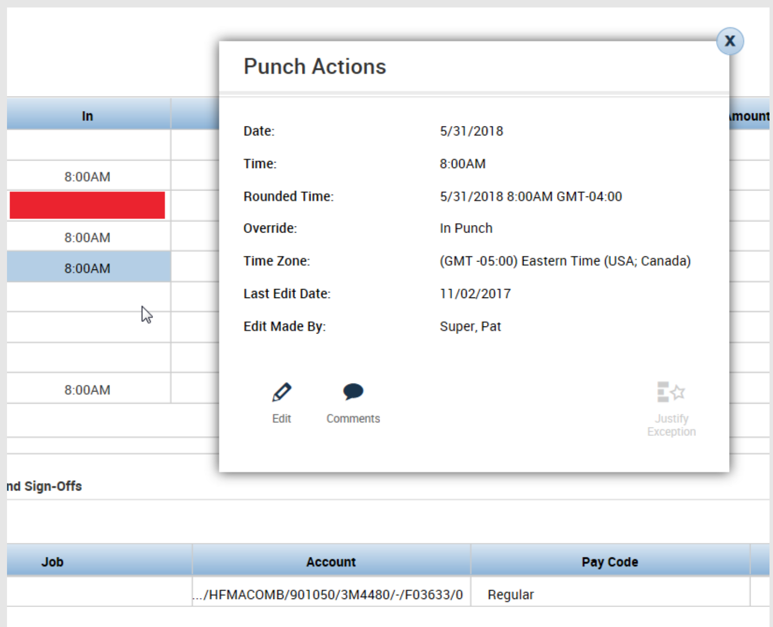
# Attaching Comments to Punches

## Purpose

Comments are predefined descriptive phrases that you attach to a punch or amount to provide additional, useful information about that transaction. You can attach as many comments as needed to explain the punch or amount. You can also add free-text notes to comments for additional clarification.

## Example

On Monday of the previous pay period, an employee arrived late to work because of car problems. You want to add a comment to the employee's 10:50 A.M. punch as a reminder of why the employee did not work her entire shift. From the Reconcile Timecard Genie, access the employee's timecard. Then add the Late-Car Problems comment to the employee's 10:50 A.M. punch for Monday of the previous pay period.

| Steps | | |
|---|---|---|
| 1 | In the timecard, right click the cell that contains the punch to which you want to add a comment. |  |
| 2 | Select **Comments** | |



| | | |
|---|---|---|
| 3 | Select one or more comments from the list.<br>*Note: If the punch already has at least 1 comment, click the **Add Comment** link to select a comment from the list.* |  |
| 4 | (Optional) Enter text in the **Note** section. | |
| 6 | Click **Ok**. | |
| 7 | Click **Save**. | |

### Business practice

You can use comments as search criteria when creating data filters used in Genies' Show drop-down list. For example, if you attach the Weather comment to early out punches, you can use the Show drop-down list to select and display employees whose timecards contain this comment.

To add a new comment to the list of comments, contact your Kronos Administrator.

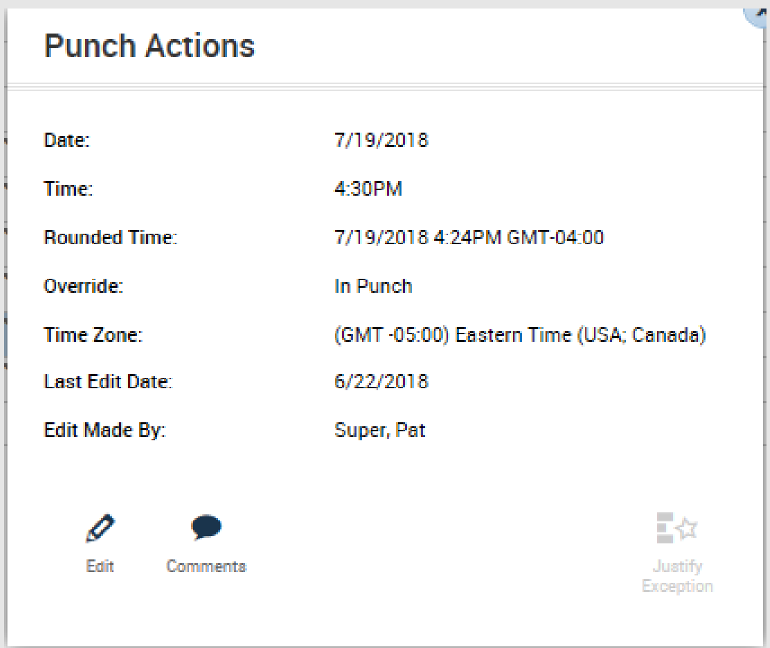
# Overriding Punches

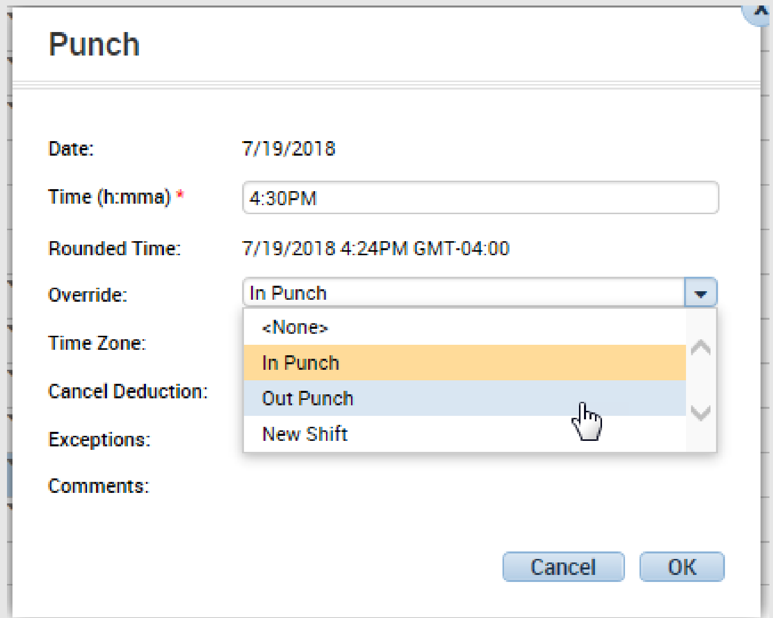
## Purpose

When employees punch in or out of their shifts, they occasionally select the wrong option on the clock or from the keyboard. Perhaps Clock In instead of Clock Out or vice versa. To calculate their time correctly Kronos needs to match up in punches and out punches. If they do not match, you override the incorrectly labeled punch to correct it.

## Example

An employee failed to Clock Out when she left. She mistakenly hit Clock In when she left. Now she has two In punches for that day and no Out punches. You override the In punch to make it an Out punch.

| Steps | | |
|---|---|---|
| 1 | In the timecard, Right-Click the punch you want to override. Select **Edit**. |   |

| Steps | | |
|---|---|---|
| 2 | Select the correct punch type from the **Override** drop-down list. |  |
| 3 | Click **OK**. | |
| 4 | Click **Save**. | |

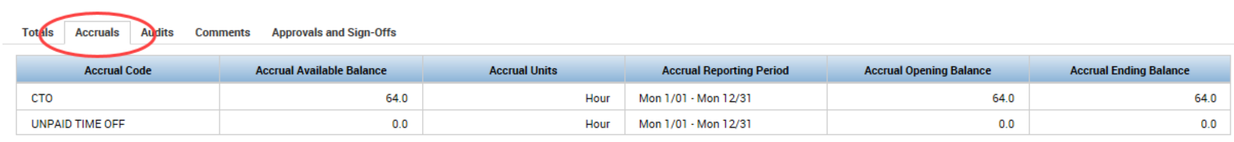
# Viewing Accrual Balances in Timecards

## Purpose

Before you enter non-worked time, confirm that the employee has accrued enough hours. The Accruals tab displays the employee's current accrued times.

## Example

Thomas Billings called in and would like to take a CTO day. Before entering the time off, check the employee's CTO balance on the Accruals tab.




| Column | Description |
|---|---|
| Accrual Code | The code that identifies and holds the type of accrual balance |
| Accrual Available Balance | The balance that is currently available |
| Accrual Units | The unit that is associated with an accrual code, measured in days, hours or money |
| Accrual Reporting Period | The accrual reporting period |
| Accrual Opening Balance | The accrual balance as of the first date in the Accrual Reporting Period column |
| Accrual Ending Balance | The accrual code balance as of the last date in the Reporting Period, including Pending Grants and Planned Takings |

### Business practice

The Opening Balance and Earned to Date accrual data can be misleading. However, the data are required in order to calculate the employee's available balance. When reviewing the accrual balances, use the data in the Accrual Available Balance column. This gives you the employee's current accrual balance as of the last date in the Time Period field.

# Adding Pay Code Amounts to Timecards

## Purpose

Pay codes keep track of the type of non-worked time that is entered in the timecard. Examples of pay codes include:  CTO/PTO, Jury Duty, or Funeral.

It is important that hours are tracked to the correct pay code so that the employee is paid correctly. There are times when you might have to edit an employee's timecard and use a pay code to track his or her non-worked time; for example, when the employee calls in sick.

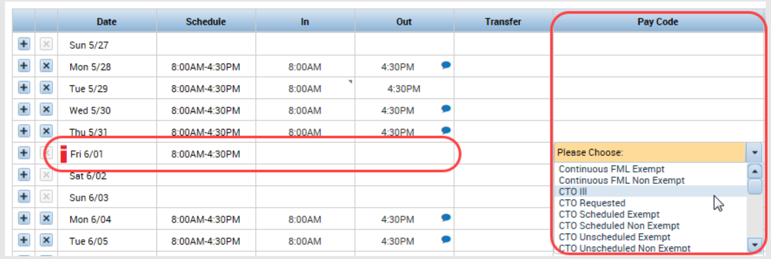
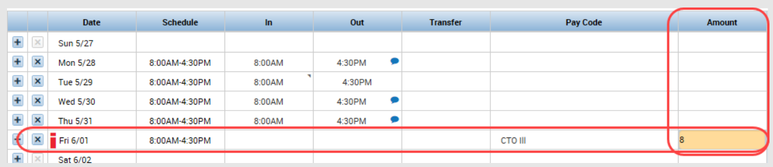
### Acceptable formats for Entering Pay Code Amounts

| Acceptable Format | Example | Interpretation by Kronos |
|---|---|---|
| Leading zeros (optional) | 07 | 7:00 hours |
| | 08:30 | 8:30 hours |
| Colon | 7:30 | 7:30 hours<br>**Note:** If you enter an amount without a colon, Workforce Timekeeper interprets your entry as is, which may be a much larger amount than you meant. For example, if you enter 730 (without the colon), Workforce Timekeeper interprets that as 730 hours. |
| Decimal | 8.5 | 8:30 hours |

## Example

An employee was sick and missed a day. Her timecard was not updated to reflect this and Kronos flags her with an absence. Edit the employee's timecard to reflect the CTO.

| Steps | | |
|---|---|---|
| 1 | Access the **Reconcile Timecard** Genie. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Sort the **Unexcused Absence** column in descending order. | |
| 4 | Select one or more employees whose timecards you want to edit and select **Timecards** from the list of **GoTo** links. | |

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>Identify the day with the absence. Does the day already have punches?<ul><li>If no, on the row of the date where you want to enter the pay code amount, select the pay code from the Pay Code drop-down list</li><li>If yes, on the row of the date where you want to enter pay code amount, click the Insert Row icon<br><br>On the new row, select the pay code from the Pay Code drop-down list.</li></ul></td><td>
</td></tr>
<tr><td>6</td><td>Click the Amount cell next to the pay code you selected. Enter the number of hours using an acceptable format.</td><td>
</td></tr>
<tr><td>7</td><td>Click Save.</td><td></td></tr>
</table>

### Note

You cannot add a pay code to a row that contains punches; you must add a separate row for the pay code transaction.

# Deleting Pay Code Amounts from Timecards

## Purpose

It is important that hours are tracked to the correct pay code so that the employee is paid correctly. There are times when you might have to edit an employee's timecard and delete a pay code entry that has been incorrectly entered to track his or her worked or non-worked time. If the pay code is an accrual amount, the deleted pay code hours will be returned to the employee's accrual balance.

## Example

The employee who reported being sick on Wednesday of the pay period was actually sick on a different day. You want to delete the pay code edit and amount for Wednesday.

| Steps | | |
|---|---|---|
| 1 | Access the employee's timecard. | |
| 2 | Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Identify the day with the pay code edit you want to remove. |  |
| 4 | Click the **Delete Row** icon next to the day and pay code amount. | |
| 4 | Click **Save**. | |

# Paying Employees for Meals

## Purpose

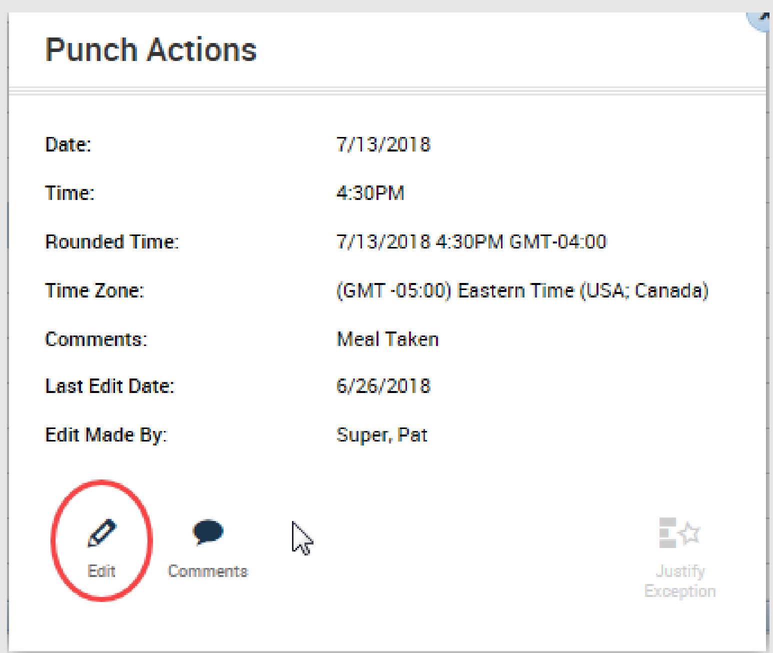
Work rules define meal deductions occur during shifts. A work rule stipulates that an employee must work a minimum of 6.5 hours before a meal deduction of 30 minutes is applied automatically to her time. This automatic deduction is reflected in the shift hours total. There may be times when an employee works through his or her meal. The employee indicates each time they punch out whether or not they took an uninterrupted 30 minute meal break.  Edits to the timecard can be made when they answer the ‘meal break’ question incorrectly.

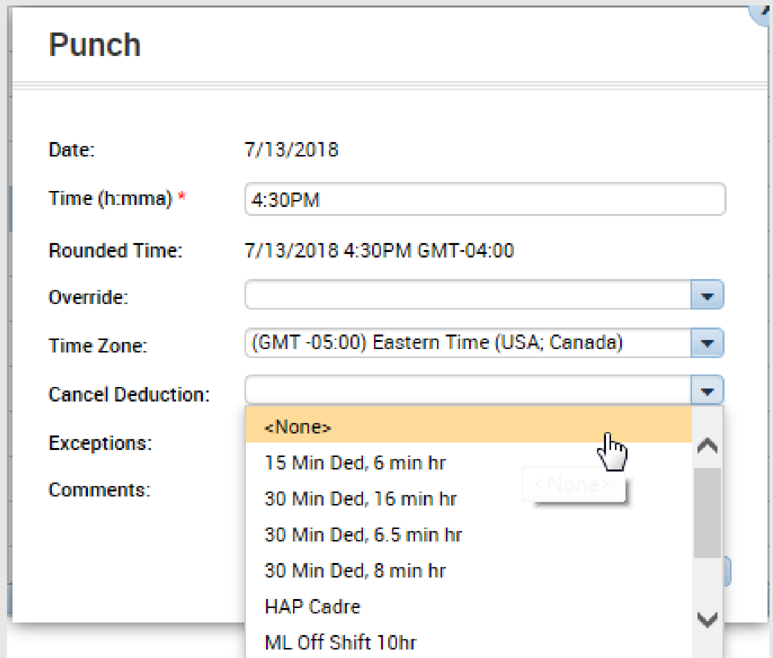
When restoring an automatic meal deduction, the manager selects ‘None’ in the cancel deduction field.

When cancelling an automatic meal deduction, the manager selects ‘All’ in the cancel deduction field.

## Example

An employee indicated when the clocked out that they did not take an uninterrupted 30 minute meal break.  This was a mistake.  They did take an uninterrupted 30 minute meal break.  They have recorded this mistake in the exception log.  You need to restore the meal deduction for this shift.

| Steps | | |
|---|---|---|
| 1 | From a Genie, select one or more employees whose timecards you want to edit, and then click the **Timecard** option of the **GoTo** button | |
| 2 | Right-click the **Out** punch cell on the date you want to restore the deduction. |   |
| 3 | Select **Edit**. | |

| Steps | | |
|---|---|---|
| 4 | Select **None** from the **Cancel Deduction** drop-down list. |  |
| 5 | Click **OK**. | |
| 6 | Click **Save**. | |

**Caution**

When cancelling a deduction, if you select a meal deduction other than the one assigned to the employee’s work rule, the deduction will not be canceled. If you do not know the employee’s assigned deduction rule, select **All** from the Cancel Deduction drop-down list.

**Tip**

You can restore a meal deduction cancellation by performing the same steps and selecting <None> from the Cancel Deduction drop-down list.

# Marking/Unmarking Exceptions as Reviewed

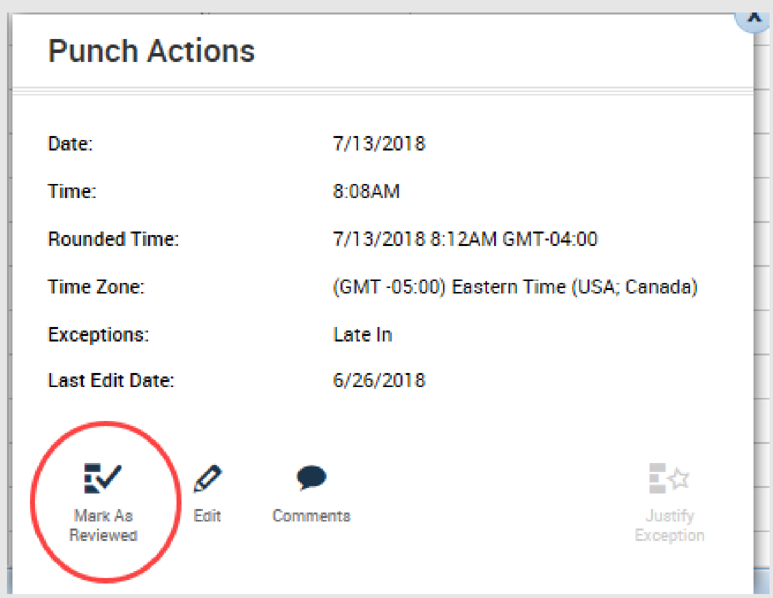
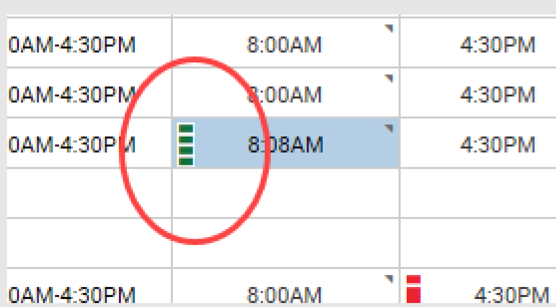
## Purpose

Once you review an exception and resolve it to your satisfaction, you can mark the exception as reviewed. The exception remains visible in the timecard and in Genies, but no longer appears in exception reports or queries. Once the exception is marked as reviewed, a green border appears around the cell containing the exception.

You can unmark an exception as reviewed at any time.

## Example

An employee arrived late to work. You added a comment to the employee's In punch as a reminder of why the employee did not work her entire shift. Now you want to mark the exception as reviewed so that you do not re-check it again at a later date.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In the timecard, Right-click the cell containing the exception.</td><td></td></tr>
<tr><td>2</td><td>Do you want to mark an exception as reviewed, or unmark an exception as reviewed?<br>• To mark an exception as reviewed, select Mark as Reviewed<br>• To unmark an exception as reviewed, select Unmark as Reviewed</td><td>
</td></tr>
<tr><td>3</td><td>Review the results.</td><td>
</td></tr>
</table>

# Transferring Hours for Entire Shifts

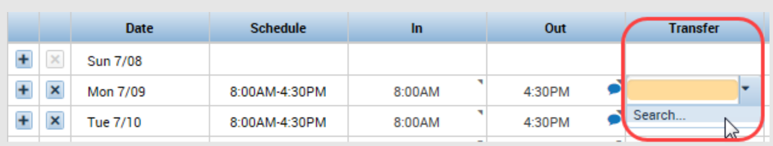
***** See Performing Additional Manager Tasks for On Call work rule transfers *****

## Purpose

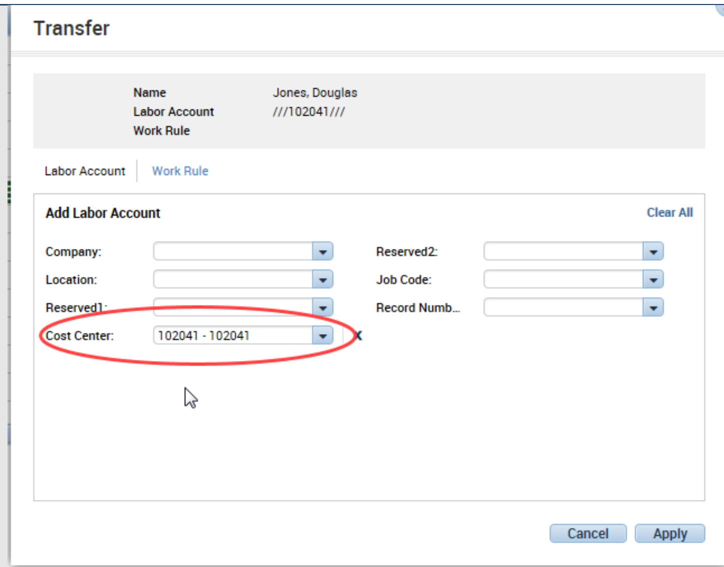
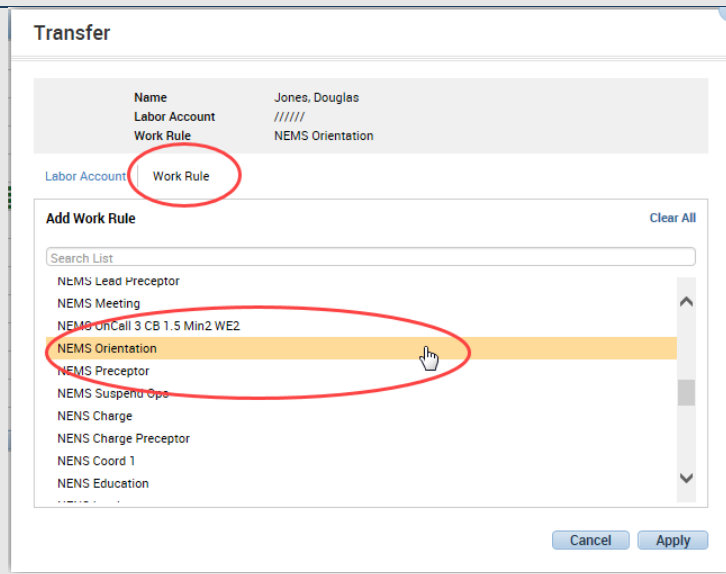
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule in their Timecard rather than their Schedule for an entire shift.

## Example

An employee worked their entire shift in a different Department/Cost Center, which is not her primary labor account assignment. Access the employee's timecard and transfer the entire shift to a different Department/Cost Center.

| Steps | | |
|---|---|---|
| 1 | Access the **Reconcile Timecard Genie**. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Select the employee and click the **Timecard** option of the **GoTo** button. | |
| 4 | Click the drop-down arrow in the **Transfer** cell to the right of the **Out** punch for the date you want to record the transfer. |   |
| 5 | Does the labor account or work rule appear in the Transfer list?<br>• If yes, select the labor account or work rule and continue to step 8<br>• If no, select **Search** and continue to the next step | |

| | | |
|---|---|---|
| 6a | What kind of transfer(s) do you want to perform using the **Transfer** dialog box?<br>• To transfer hours to another cost center, enter or select the appropriate value in the **Cost Center** box. |  |
| 6b | • To transfer hours to another work rule, select the correct work rule from the **Work Rule** link |  |
| 7 | Click **Apply**. | |
| 8 | Click Save. | |

# Transferring Hours for Parts of Shifts

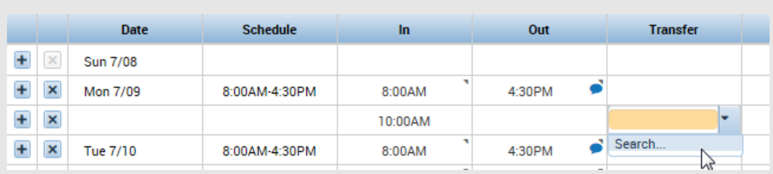
***** See Performing Additional Manager Tasks for On Call work rule transfers *****

## Purpose

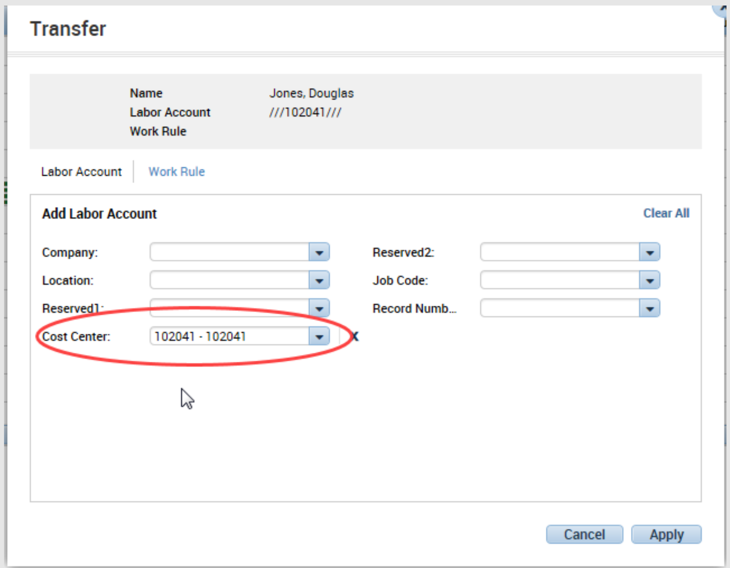
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule in their Timecard rather than their Schedule.

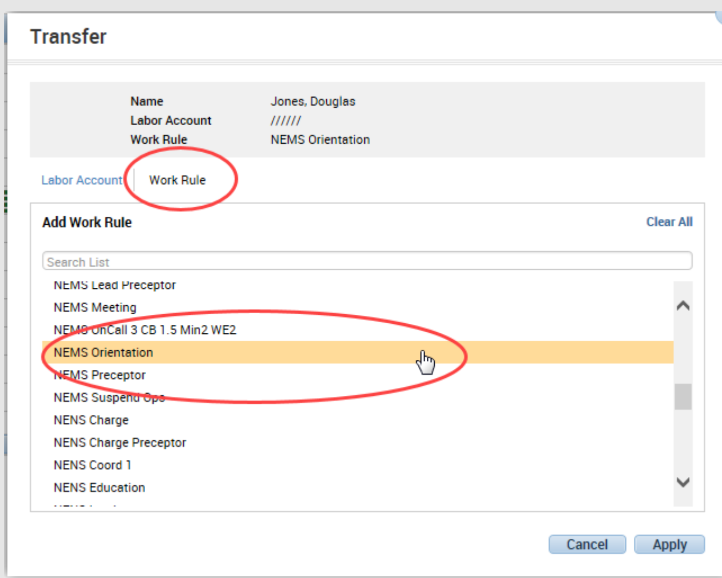
## Example

An employee worked in her home cost center, which is her primary labor account assignment, from 8:00 A.M. to 10:00 A.M. She then worked in a different Department/Cost Center from 10:00 A.M. to 4:30 P.M. Access the employee's timecard and transfer her worked hours for that shift from 10:00 A.M. to 4:30 P.M. to a different Department/Cost Center.

| Steps | | |
|---|---|---|
| 1 | Access the **Reconcile Timecard Genie**. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Select the employee and click the **Timecard** option on the **GoTo** button. | |
| 4 | Add a row using the [+] sign button for the appropriate day. Click the **In** punch cell in the new row for the date you want to record the transfer. | |
| 5 | Enter the time the transfer began. |  |
| 6 | Click the drop-down arrow in the **Transfer** cell. | |
| 7 | Does the labor account or work rule appear in the Transfer list?<br>• If yes, select the labor account or work rule and continue to step 10<br>• If no, select **Search** and continue to the next step | |

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>8</td><td>What kind of transfer(s) do you want to perform using the Select Transfer dialog box?
<ul><li>To transfer hours to another labor account, click a labor level option and select the labor level from the Available Entries list</li></ul>
<ul><li>To transfer hours to another work rule, select the work rule from the Work Rule drop-down list</li></ul></td><td>


</td></tr>
<tr><td>9</td><td>Click Apply.</td><td></td></tr>
<tr><td>10</td><td>Click Save.</td><td></td></tr>
</table>

# Finalizing Timecards

## Approving Individual Timecards

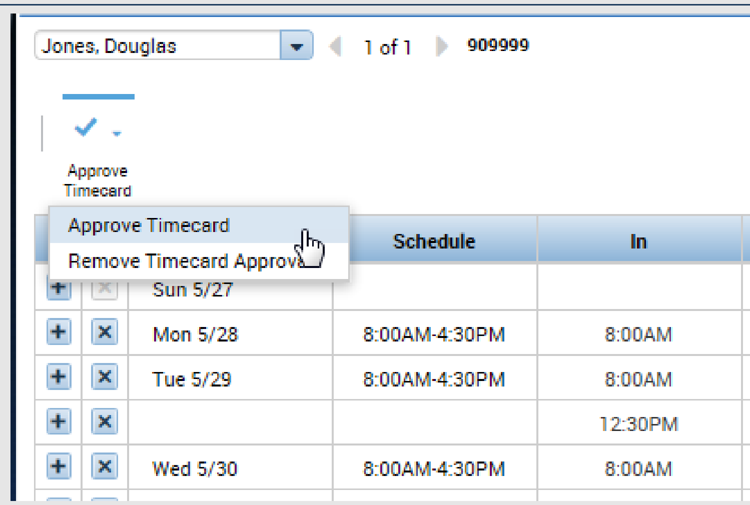
**DO NOT approve time in the future!**

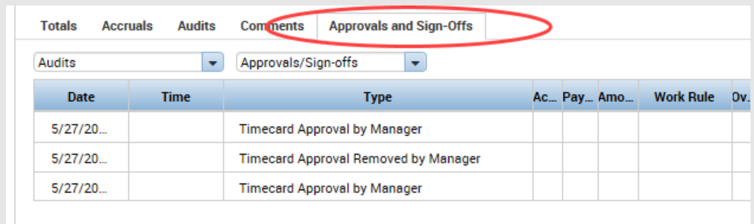
### Purpose

After you finish editing your employees' timecards, you need to approve them to indicate to payroll that they are ready for processing. You can approve timecards on a Genie or on a timecard itself. After you approve a timecard, the employee cannot make any edits to it unless you remove your approval.

### Example

You notice that an employee has approved her timecard for the previous pay period. You have reviewed the employee's time data and performed all necessary edits. You approve the employee's time for the previous pay period on her timecard.

| Steps | | |
|---|---|---|
| 1 | Access a Genie, such as the **Pay Period Close** Genie. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Select the employee and click the **Timecard** quick link. |  |
| 4 | Select **Approve Timecard > Approve Timecard**. | |

| | | |
|---|---|---|
| 5 | Do you want to check the approval status on the timecard or a Genie?<br>• To check the approval status on a timecard, click the **Sign-offs & Approvals** tab and review the **Approval by Manager** information<br>• To check the approval on a Genie, access the **Pay Period Close Genie**, click **Refresh**, and review the **Manager Approval** column |  |

**Tip**

**DO NOT approve time in the future!**

You can remove your approval by following the same steps and selecting Remove Approval from the Approvals menu.

# Approving Multiple Timecards

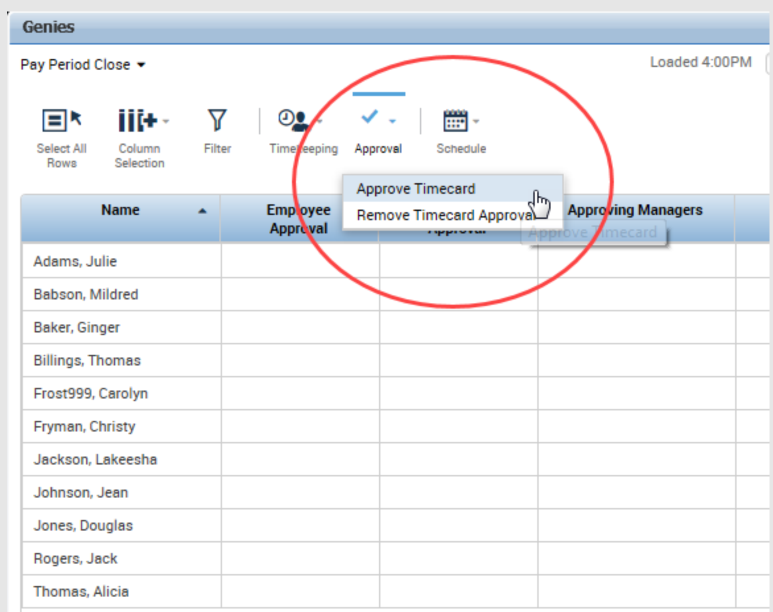
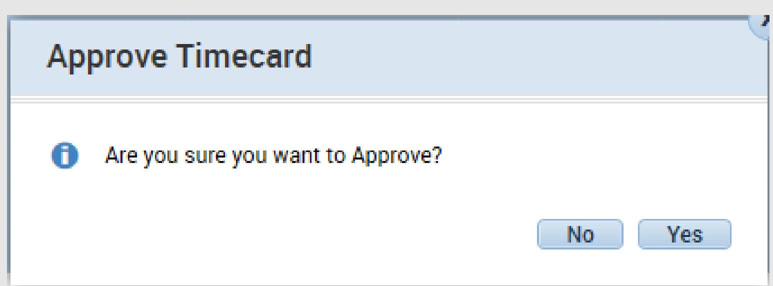
**DO NOT approve time in the future!**

## Purpose

Once you have reviewed and updated your employees' timecards, you can approve them all at once, rather than individually.

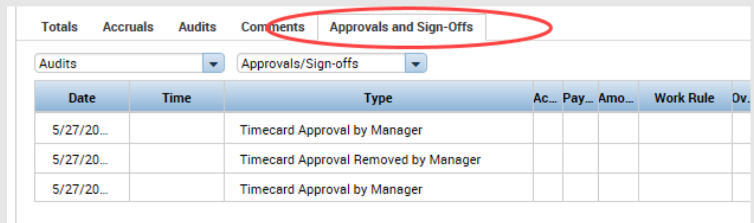
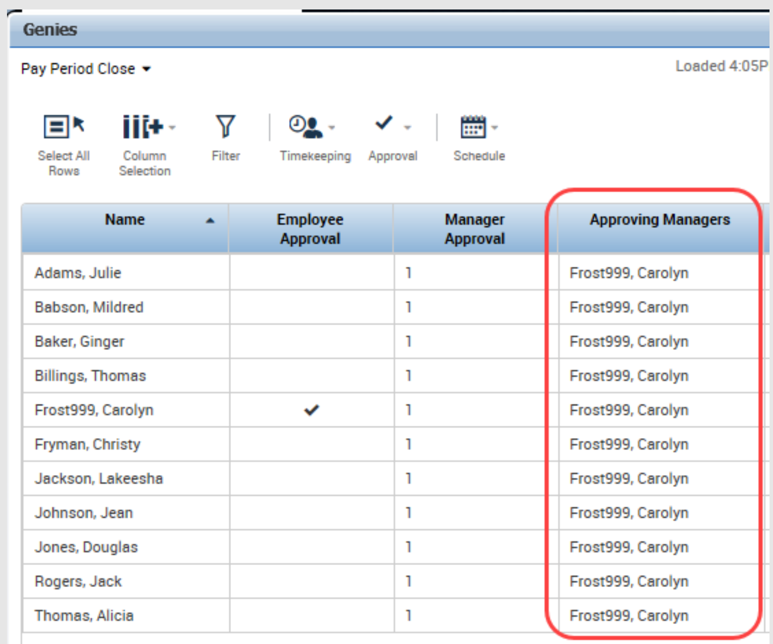
## Example

You have reviewed and completed final edits to your employees' timecards. You will approve them all at once.

| Steps | | |
|---|---|---|
| 1 | Access a Genie, such as the **Pay Period Close** Genie. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Do you want to approve timecards for all employees or specific employees?<br>• To approve timecards for all employees in a Genie, select **Actions > Select All**<br>• To approve timecards for specific employees, hold the **Ctrl** key and select each employee |  |
| 4 | Select **Approval > Approve Timecard**. | |
| 5 | Click **Yes** to confirm your approval. |  |

## Steps

| | | |
|---|---|---|
| 6 | Do you want to confirm the status of your approval on a timecard or a Genie?<br><br>• To confirm the approval status on a timecard, click the **Approvals and Sign-Offs** tab. |  |
| | • To confirm the approval on a Genie, access the **Pay Period Close Genie**, click **Refresh**, and review the **Manager Approval** column |  |

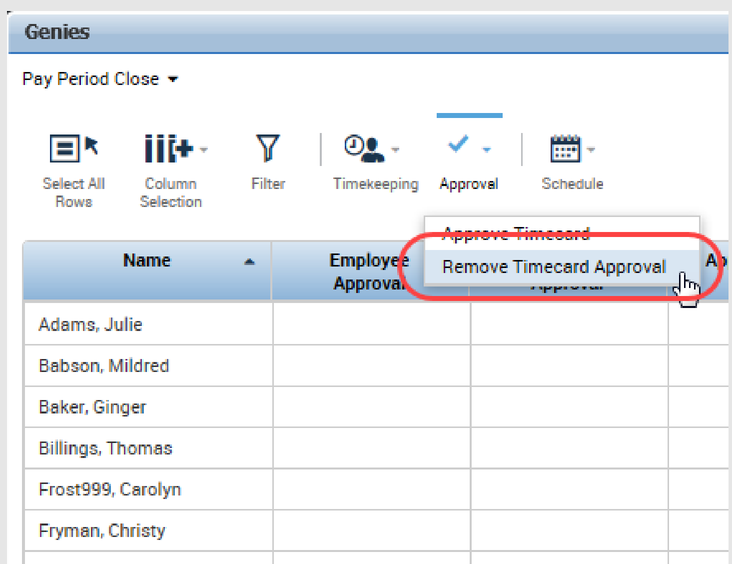
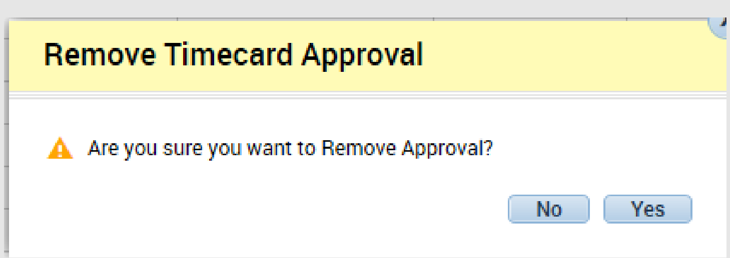
# Removing Your Timecard Approvals

## Purpose

After you approve one or more employees' timecards, they are no longer editable. If the need arises and you have the appropriate permissions, you can remove your approval. After you remove your approval, you can make the necessary timecard edits and then re-approve the timecards.

## Example

You have been informed that an employee forgot to enter four hours of CTO time for Wednesday of the previous pay period. You have already approved the employee's timecard. You need to remove your approval, add four hours of CTO time for that Wednesday, and then re-approve the timecard.

| Steps | | |
|---|---|---|
| 1 | Access a Genie, such as the Pay Period Close Genie. | |
| 2 | Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list. | |
| 3 | Select the employee. | <br> |
| 4 | Select **Approval > Remove Timecard Approval**. | |
| 5 | Click **Yes** to confirm that you want to remove your approval. | <br> |

## On Your Own Practice

1. Open the Timecard for Mildred Babson for the Previous Pay Period.
2. When Mildred worked on the last Saturday in the pay period she did not punch in or out. Her entry in the Exception Log indicates that she started at 7:59am on that day and left at 4:32pm on the same day.
   Enter the missing punches.
3. Add an “Extra Shift” comment to the out punch you just created for the last Saturday in the pay period.
4. The Exception Log also indicates that she transferred to a different department on the same Saturday at 1:00pm.
   Add the mid-shift transfer to a different cost center.
5. Mildred did not take meal break on this day.
   Cancel all meal deductions for the Out punch you just created for the last Saturday in the pay period.
6. Mildred was scheduled to work 8 hours on the first Sunday in the pay period, but called in sick.
   Check to see if Mildred has any CTO time, then add the appropriate pay code and amount to the first Sunday in the pay period.
7. Approve Mildred’s time for the pay period.
8. Remove your approval of Mildred’s time for the pay period.
9. Approve the timecards for everyone in your All Home for the Previous Pay Period using the Pay Period Close genie.

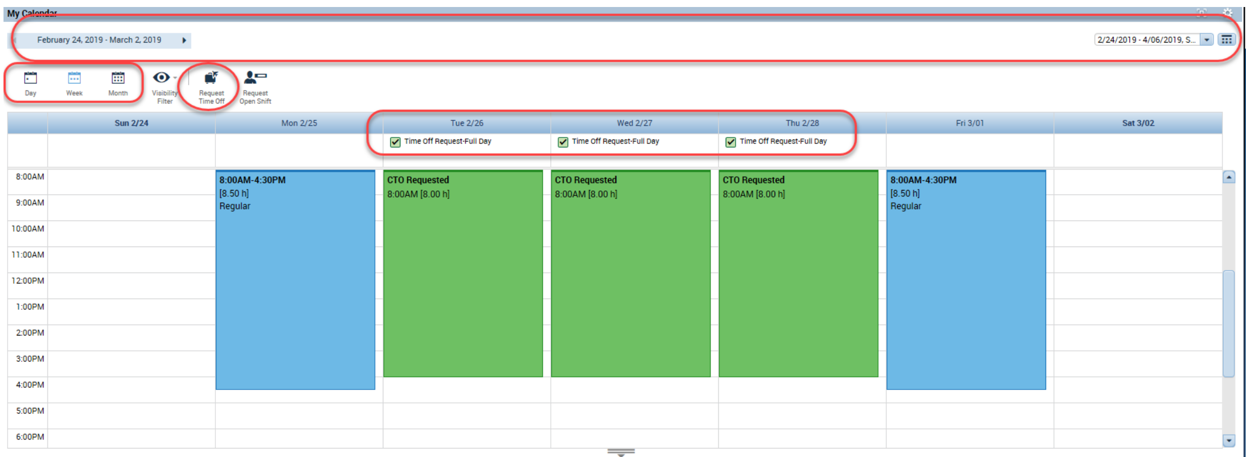
# Time Off Requests

## Requesting Time Off Using My Calendar

### Purpose

The My Calendar widget provides a convenient way for you to submit, retract, and monitor your own requests for time off. Kronos forwards the requests to your manager.

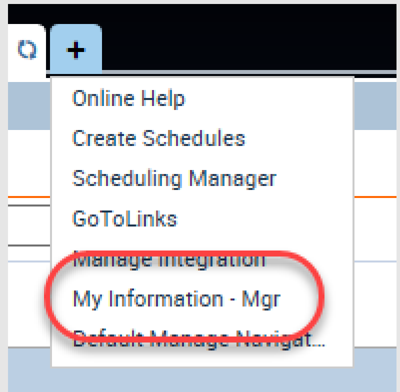
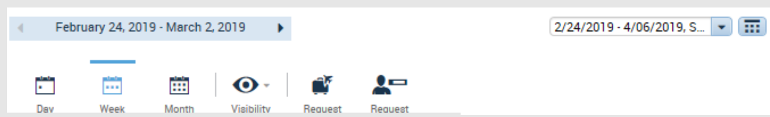
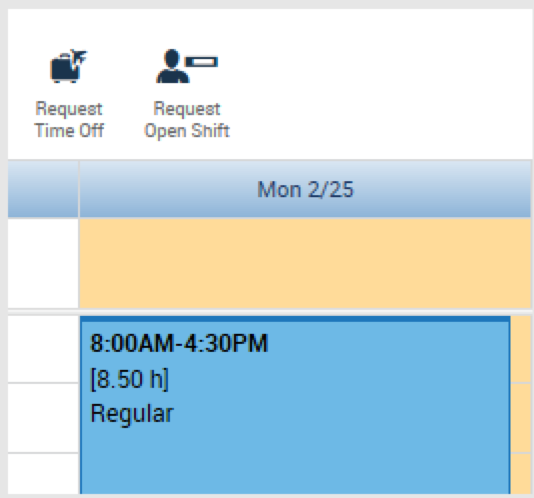
NOTE: Requests must be made for continuous days.

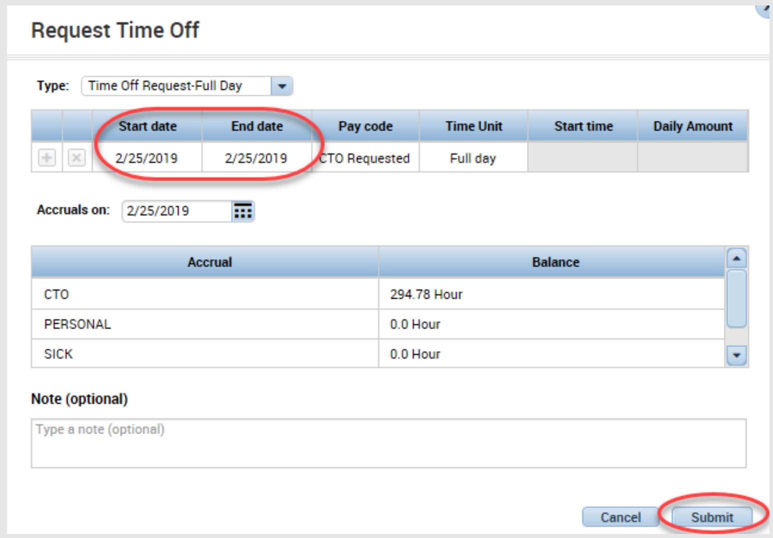
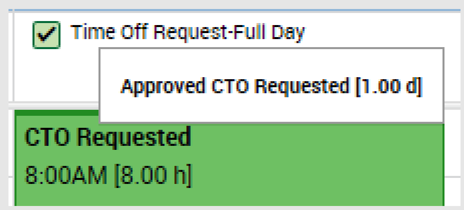
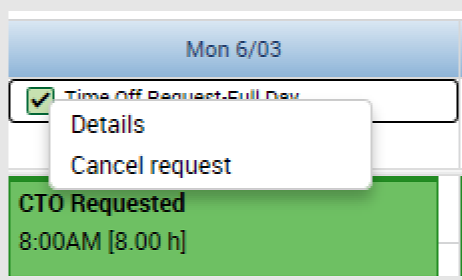



| Component | Description |
|---|---|
| Time Period | Select the time period to display and also to control the day, week, or month view of the calendar. When in week view, you can select which week of your time period to view. |
| Calendar | This section displays information about your schedule and allows you to select specific days for which to submit requests. |
| Request Time Off | Use this button to request time off. |
| My Current Requests | Existing requests that you have made in the past display at the top of each day in the calendar.. |

### Example

Your childcare provider will be unavailable next Thursday and Friday and you need to take the day off. Submit a time-off request for eight hours of vacation for next Thursday and Friday.

| Steps | | |
|---|---|---|
| 1 | What is your role?<br>**Workforce Team Member**: Maximize the **My Calendar** widget in the default workspace.<br><br>**Manager/Timekeeper**: Navigate to the **My Information Mgr** workspace using the **New Tab Menu**. Then maximize you're **My Calendar** widget. |  |
| 2 | Select the specific time period from the **Time Period** drop-down list. You can also adjust the calendar view by selecting the day, week, or month button.  . Use the back and forward buttons to navigate to a specific week. |  |
| 3 | Select the day you are requesting by clicking the day/date column heading.  Select the 1st day if requesting multiple days on a row.<br>Click the **Request Time Off** button. |  |

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>4</td><td>Confirm the Start and End Date. You can include Notes if you need to include more information<br>Click Submit.</td><td>
</td></tr>
<tr><td>5</td><td>View the request status by 'hover to discover'. Point at the request in My Calendar. The Status displays.<br><br>Note: Once your request has been approved or denied, the status will display here.</td><td>
</td></tr>
<tr><td>6</td><td>Note: You can 'right click' a request to view Details or Cancel it.</td><td>
</td></tr>
</table>

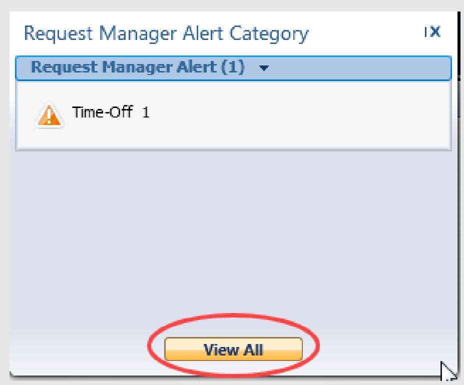
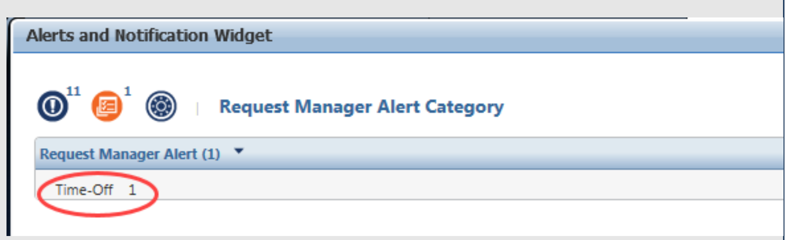
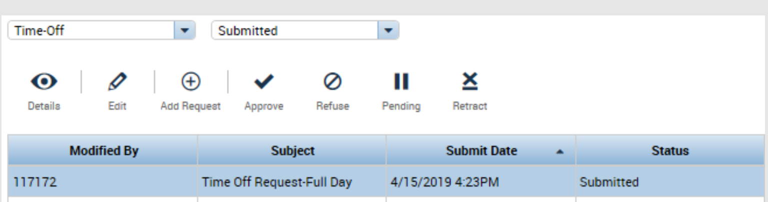
# Responding to Time-Off Requests

## Purpose

The Requests widget summarizes all employees' requests in one window and provides all supporting information to process requests from the same screen. If you approve a request, the change is automatically made to the schedule and the employee is notified automatically. If you reject a request, the employee is notified automatically.

## Example

An employee submitted a time-off request. You want to review and respond to the request.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Select the Requests Widget.</td><td>
</td></tr>
<tr><td>4</td><td>From the Request Widget, select View All.</td><td>
</td></tr>
<tr><td>5</td><td>From the Alerts and Notifications Widget, select a request.</td><td>
</td></tr>
<tr><td>6</td><td>From the Requests widget, select a request and click the appropriate button to take action. Details of the request appear at the bottom of the page. Accruals for the employee are also visible at the bottom of the page.</td><td>
</td></tr>
</table>

# Reviewing Time and Attendance Data

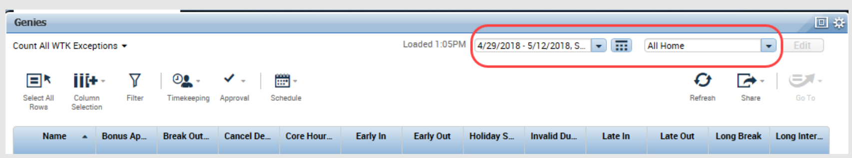
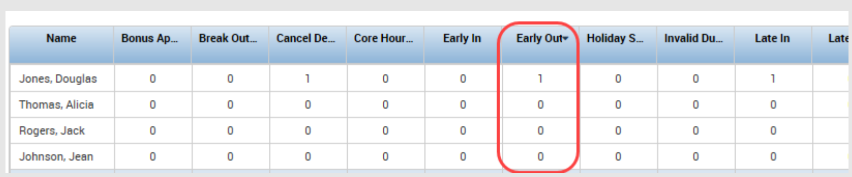
## Reviewing Employee Data Using a Genie

### Purpose

Genies present customized views of employee information in a summarized, easy-to-read format so that you can quickly analyze and respond to time, labor, scheduling, and attendance needs.

### Example

You want to look for all employees who have Early Out Exceptions in a pay period. Use the Count All WTK Exceptions Genie to perform this task.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Access the Count All WTK Exceptions Genie.</td><td></td></tr>
<tr><td>2</td><td>Select the specific set of employees from the Show drop-down list.</td><td rowspan="2">
</td></tr>
<tr><td>3</td><td>Select the specific time period from the Time Period drop-down list.</td></tr>
<tr><td>4</td><td>To sort information by one or two columns, click the column for the secondary sort first, and then click the column for the primary sort.</td><td>
</td></tr>
<tr><td>5</td><td>Review the information in the Count All WTK Exceptions Genie.</td><td></td></tr>
</table>

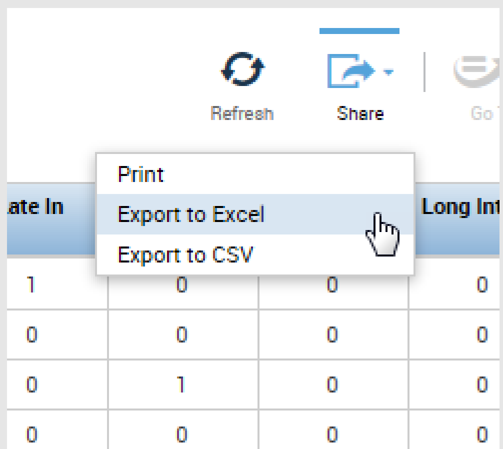
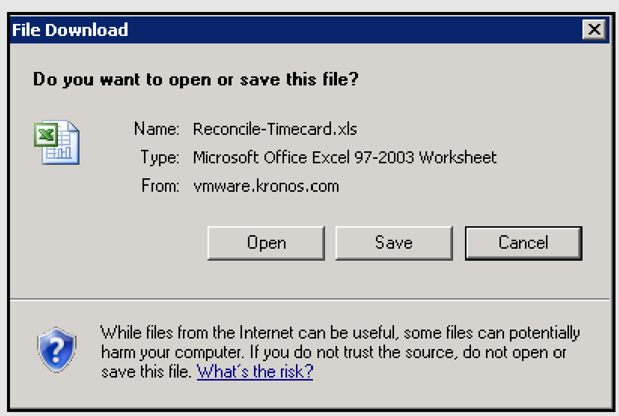
# Exporting Genie Data

## Purpose

Genies display critical information in an easy-to-read format. You can export this information to other applications, such as Microsoft Excel, where you can reformat the data for your personal needs. For example, you can save labor information in the Count All WTK Exceptions Genie as an Excel file and then open it with Microsoft Excel to summarize the data in each column.

## Example

On a regular basis, you export timecard data to Microsoft Excel to perform further data analysis.

| Step | | |
|---|---|---|
| 1 | Access a Genie, such as the Count All WTK Exceptions Genie. | |
| 2 | Select **Share > Export to Excel**. |  |
| 4 | If prompted, select **Open** to review the Genie data in Excel. |  |

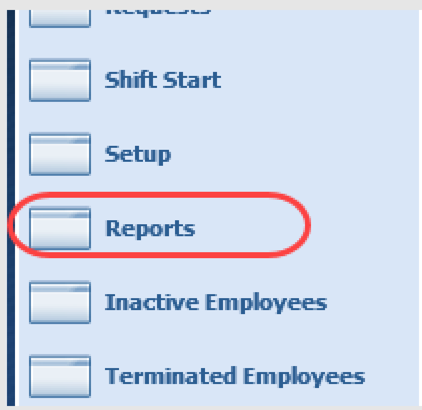
# Generating Reports

## Purpose

You can generate reports on a daily, weekly, or pay period basis, or any time you need information to accomplish your business tasks.

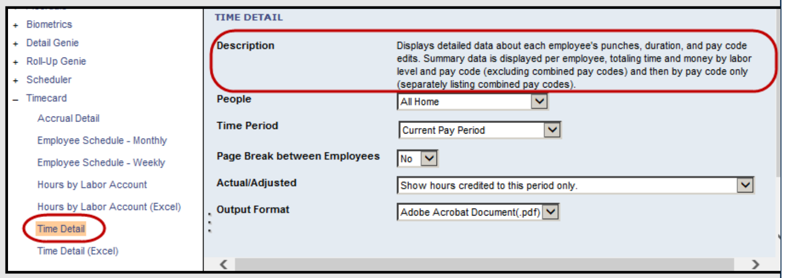
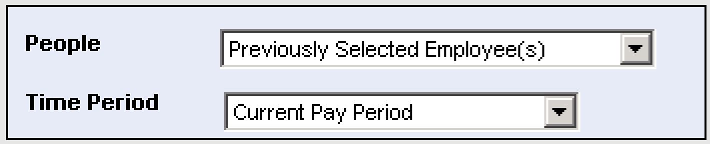
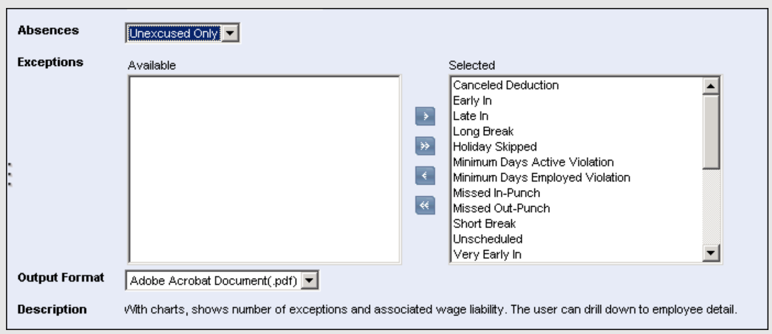
## Example

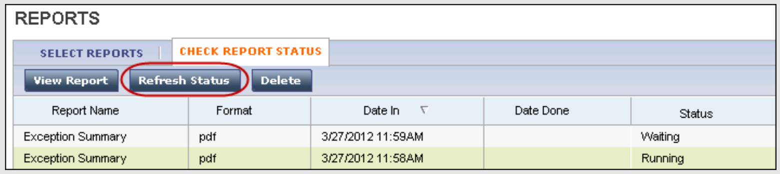
For auditing and validation purposes, you want to review all pay code data and totals that have been tracked for employees for the previous pay period. Generate a Time Detail report to review this information.

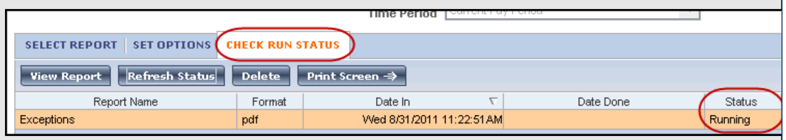
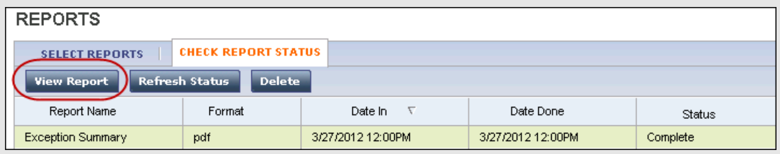
| Steps | | |
|---|---|---|
| 1 | Click the **Reports** link in the Related Items pane of the default workspace.. |   |
| 3 | On the **Select Report** tab, click the plus **(+)** to display a category's contents. |   |

## Steps

| | | |
|---|---|---|
| 4 | Click a report name.<br><br>**Note:** The report's description appears at the top of the page. |  |
| 5 | Select the specific employees from the **People** drop-down list. |  |
| 6 | Select the specific time period from the **Time Period** drop-down list. | |
| 7 | Select one or more available options to identify the report information you need.<br><br>**Note:** Options can vary by report. |  |
| 8 | Select an **Output Format**.<br><br>**Note**: Reports that have (Excel) at the end of their names allow you to run the report in **Microsoft Excel Document (.xls)** format. All other reports can only be run in **Adobe Acrobat Document (.pdf)** format. |  |
| 9 | What do you want to do with the report?<br>• To generate a report, click **Run Report**.<br>• To generate a report and automatically email it to recipients, click **E-mail**. Fill in the **Recipients** field in the E-mail dialog box and click **OK**. |  |

<table>
<tr><th colspan="3">Steps</th></tr>
<tr>
<td>10</td>
<td>If you select Run Report, you are brought to the Check Run Status tab.<br><br>Click Refresh Status. The Status column displays Complete or Failed once the application has finished the report.</td>
<td>


</td>
</tr>
<tr>
<td>11</td>
<td>To view a report, click a report name to highlight it and do any of the following:<ul><li>To use menu options, click View Report</li><li>To use mouse options, double-click the report name</li></ul></td>
<td>
</td>
</tr>
</table>

Here is an example of an Exceptions report:

**Exceptions**

| | |
|---|---|
| Data Up to Date: | 6/3/2012 7:19:16 PM |
| Executed on: | 6/03/2012 7:18PM GMT-04:00 |
| Printed for: | fclark |

| | |
|---|---|
| Time Period: | Current Pay Period |
| Query: | All Home |
| Exceptions: | (24): \|Canceled Deduction\|Early In\|Late In\|Long Break\|Holiday Skipped\|Minimum Days Active Violation\|Minimum Days Employed Violation\|Missed In-Punch\|... |
| Absences: | Unexcused Only |

| Exception Day/Date<br>*Comment* | Exception | Scheduled | Actual or Pay Code | Amount | Amount Over Exception |
|---|---|---|---|---|---|
| Adams, Julie | ID: 1 | | | | |
| Mon 5/28/2012 | Early In | 5/28/2012 9:00:00 AM | 5/28/2012 8:45:00 AM | 0:15 | 0:07 |
| | Early Out | 5/28/2012 2:00:00 PM | 5/28/2012 1:50:00 PM | 0:10 | 0:02 |
| Tue 5/29/2012 | Unexcused Absence | | | | |
| Wed 5/30/2012 | Unexcused Absence | | | | |
| Thu 5/31/2012 | Unexcused Absence | | | | |

| Exception | Total | Total Amount Over Exception |
|---|---|---|
| Early In: | 1 | 0:07 |
| Early Out: | 1 | 0:02 |
| Unexcused Absence: | 3 | N/A |

| Exception Day/Date | Exception |
|---|---|
| Aguirre, Raymond | ID: 4 |
| Mon 5/28/2012 | Unexcused Absence |
| Tue 5/29/2012 | Unexcused Absence |
| Wed 5/30/2012 | Unexcused Absence |
| Thu 5/31/2012 | Unexcused Absence |
| Fri 6/1/2012 | Unexcused Absence |

| Exception | Total | Total Amount Over Exception |
|---|---|---|
| Unexcused Absence: | 5 | N/A |

# Additional Manager/Timekeeper Tasks

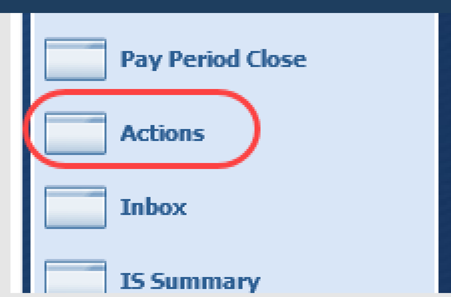
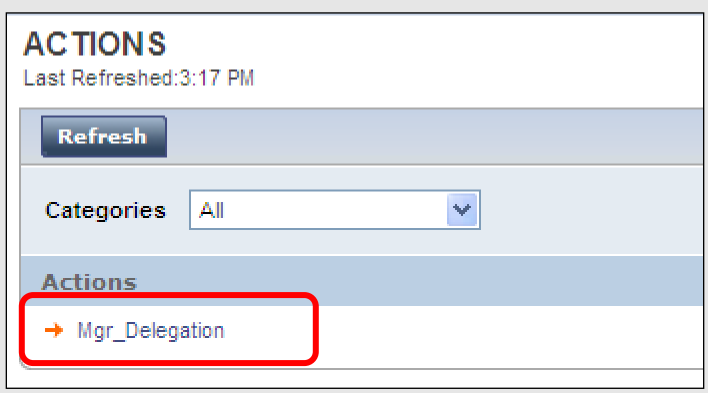
## Requesting Backup Coverage

### Purpose

You can temporarily delegate your manager authority to perform your timekeeping and scheduling tasks to other managers. The other managers can perform your tasks using their own user names and passwords. For example, they can modify schedule shifts for absent employees, or review and approve timecards. This allows the business process to keep moving, even when you are not there. All edits they perform are recorded and assigned to their names for audit purposes.

### Example

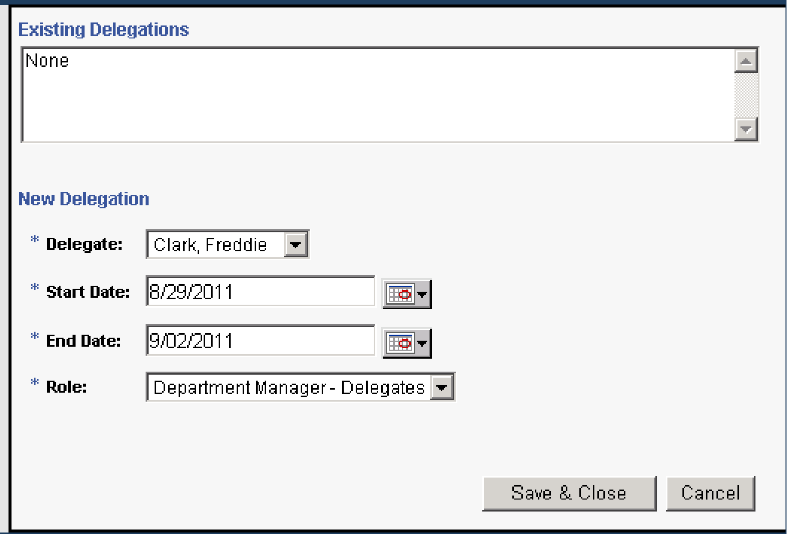
You are busy with the annual review process. You send a delegation request to another manager so that you can temporarily assign your timekeeping tasks to her. This will ensure that your employees' timecards are processed for payroll on a timely basis.

| Steps | | |
|---|---|---|
| 1 | Select the **Actions** widget from the Related Items pane of your default workspace. |   |
| 2 | From the list of actions, select **Mgr_Delegation**. |   |
| 3 | If other delegation assignments exist, click **Create New Delegation**. | |

## Steps

| | |
|---|---|
| 5 | From the **Delegate** drop-down list, select the manager to whom you want to delegate your tasks.<br>Select the **Start Date** and **End Date** to indicate when you want to delegate your tasks. |
| 6 | From the **Role** drop-down list, select the profile that identifies which tasks you want to delegate.<br>Contact your Kronos Administrator if the role profile you require does not appear in the list. |
| 7 | Click **Save & Close**. The application sends the delegation request to other manager's Inbox. |



# Accepting or Declining Backup Coverage Requests

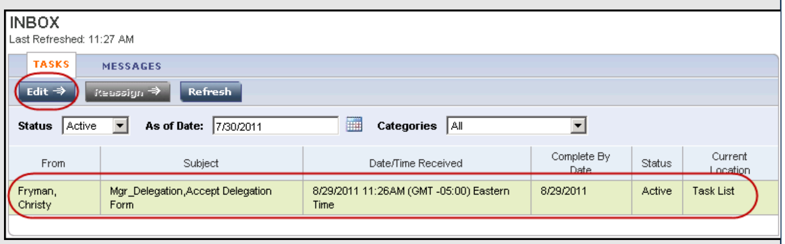
## Purpose

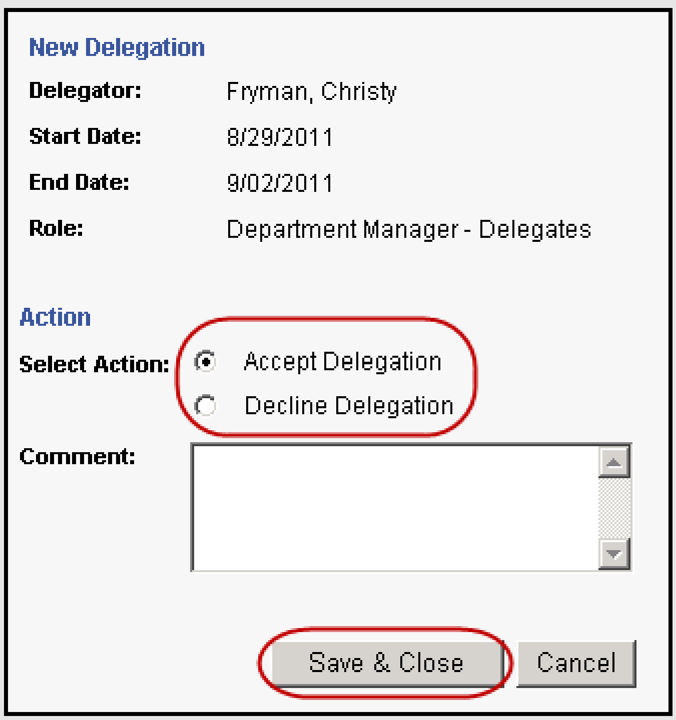
When another manager sends you a request to cover his or her timekeeping and scheduling tasks, the application automatically places a task in your Request Manager Inbox and the. The delegation request specifies the start and end dates and the role you will assume. You can accept or decline the request.

## Example

Another manager is going to be away attending a conference next week. He sent you a delegation request that you will review and accept.

| Steps | |
|---|---|
| 1 | Access the **Inbox** from the Related Items pane of your default workspace. |
| 2 | From the **Tasks** tab, select the delegation request and click **Edit**. |
| 3 | In the **Action** section, accept or decline the delegation request. |
| 4 | (Optional) Enter a message to the requesting manager in the **Comment** field. |
| 5 | Click Save & Close. |



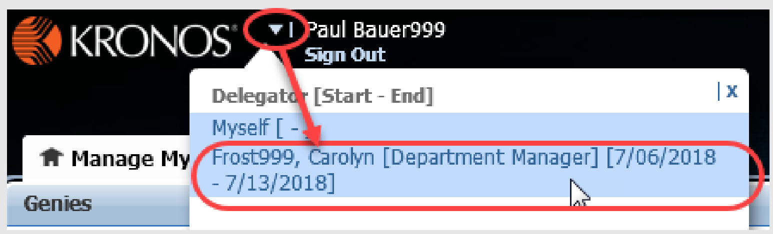
# Switching to Delegated Roles

## Purpose

After you accept a delegation request, the application automatically provides access to the tasks defined in the role profile on the specified start date. A Switch Role link appears next to your name so that you do not have to log on as the manager who delegated the tasks to you. The link identifies which role you currently are working. Note: One must log off and log back in to be able to switch roles immediately after accepting a request.

## Example

Another manager delegated her tasks to you this week and you are ready to perform her timekeeping tasks. You do not need to log off as yourself and log on as the other manager because you can switch roles while logged on with your own user name and password.

| Steps | | |
|---|---|---|
| 1 | Click the **Switch Role** link.<br>**Note:** If you do not see the Switch Role link, log off and then log on again using your own user name and password. |  |
| 2 | Click to select the manager whose tasks you will perform as his or her delegate. | |
| 3 | Use the same link and click **Myself** to return. | |

**Note**

You can use the application's functions that support the management tasks delegated to you to perform the delegating manager's timekeeping and/or scheduling tasks.

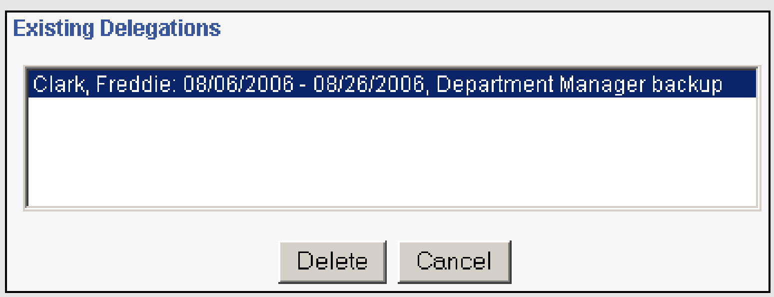
# Canceling Delegations

## Purpose

Once the end date of delegation occurs, the application automatically removes the rights of the other manager to your tasks. You can end the delegation earlier.

## Example

You had delegated your management tasks to another manager to end next week so that you could focus on the annual review process. You completed this process earlier, so you will cancel the delegation.

| Steps | | |
|---|---|---|
| 1 | Select **Actions** from your Related Items pane in your default workspace | |
| 2 | From the list of actions, select **Mgr_Delegation**. | |
| 3 | Click **Remove Existing Delegation**. Then, click **Next**. |   |
| 4 | Select the existing manager delegation that you want to cancel and click **Delete**. |   |

# Creating Ad Hoc and Personal HyperFind Queries

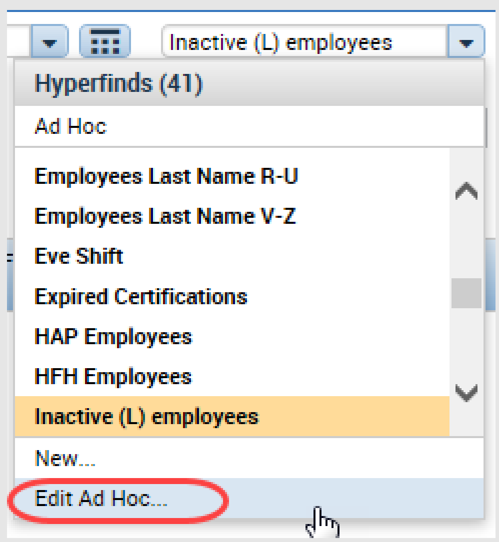
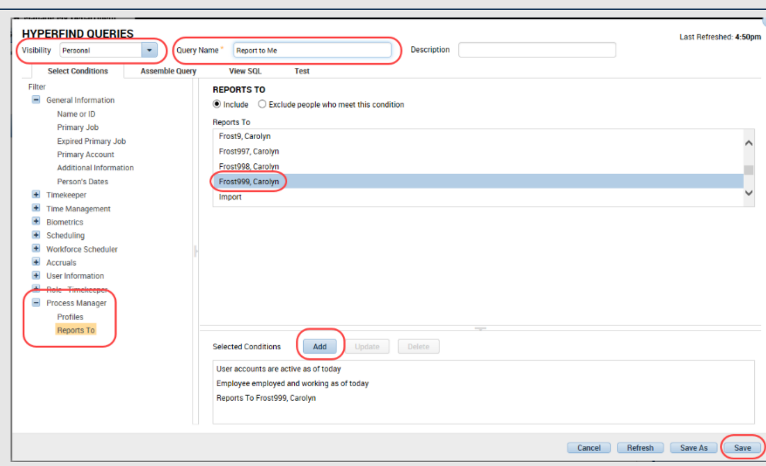
## Purpose

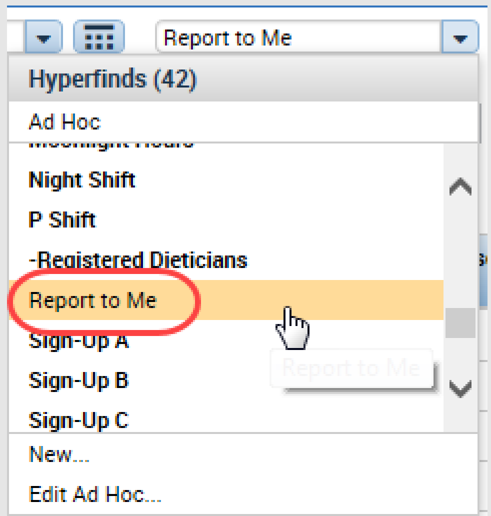
Kronos uses HyperFind queries to search People records and return employees that meet a specific set of criteria. You can use HyperFind queries in Genies and reports. If an existing HyperFind query does not return the employees you need, you can create your own ad hoc query. Ad Hoc queries are temporary and are available only during your current session. Once you log off, Ad Hoc queries are no longer available.

Another option is to create a Personal query. Personal queries are available only to you and remain available until you remove them.

## Example

You want to review time and attendance data for the employees in one of your departments who report to you directly. Create an Ad Hoc HyperFind query and save it for future use.

| Steps | | |
|---|---|---|
| 1 | Select **Edit Ad Hoc** from the Hyperfinds drop-down list on any Genie. |  |
| 3 | Change the **Visibility** to **Personal.**<br>Enter a Query Name.<br>Select **Reports To** from the **Process Manager** filter.<br>Choose your name from the **Reports To** list.<br>Click **Add** to select the condition.<br>Repeat steps 2 through 5 to add additional conditions, if necessary. |  |

| Steps | | |
|---|---|---|
| 4 | Click **Save As**. | |
| 5 | If you created a Personal query, you will be able to view it in the **Hyperfinds** list. |  |

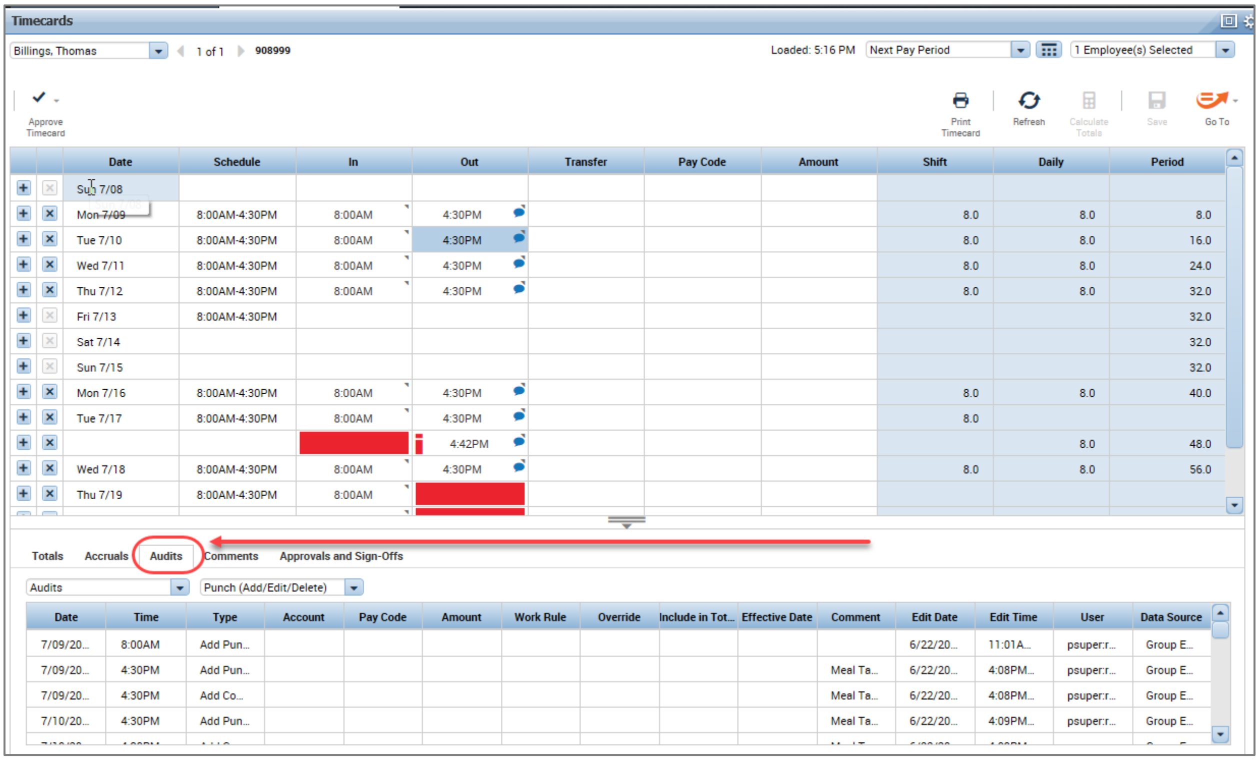
# Viewing the Audit Trail

## Purpose

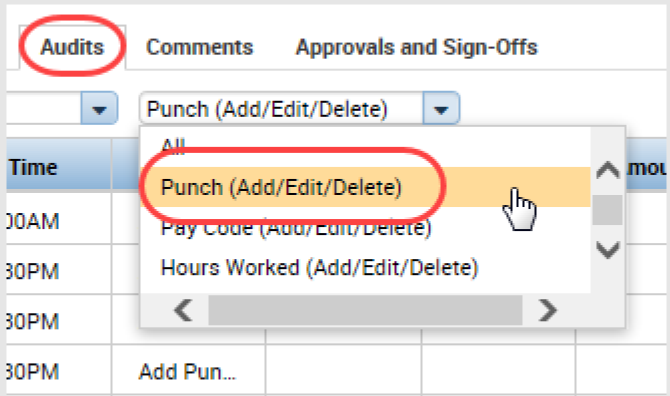
The Audits tab is located at the bottom of the Timecard workspace. You can view all edits or a specific type of edit, such as punch edits.

## Example

You want to review all manual edits that have been made to an employee's timecard.




| Column | Description |
|---|---|
| Date/Time | The effective date and time of the edit |
| Type | The kind of edit that was performed |
| Account | The account to which the edit is attributed, if different from the primary account |
| Pay Code/Amount | The pay code and amount of hours to which the edit is assigned, if applicable |
| Work Rule | The work rule used with the edit, if different from the employee's primary work rule |
| Override | The type of entry that this edit is replacing or canceling, if applicable |
| Comment | The comment attached to the edit |
| Edit Date/Time | The date and time the edit was made |
| User | The user name of the person who made the edit |
| Data Source | The component of the application from which the edit was made |

| Steps | | |
|---|---|---|
| 1 | From any timecard, click the **Audits** tab. |  |
| 2 | Select a type of edit or select **All** to display all types of edits from **Type of Edit** drop-down list. | |

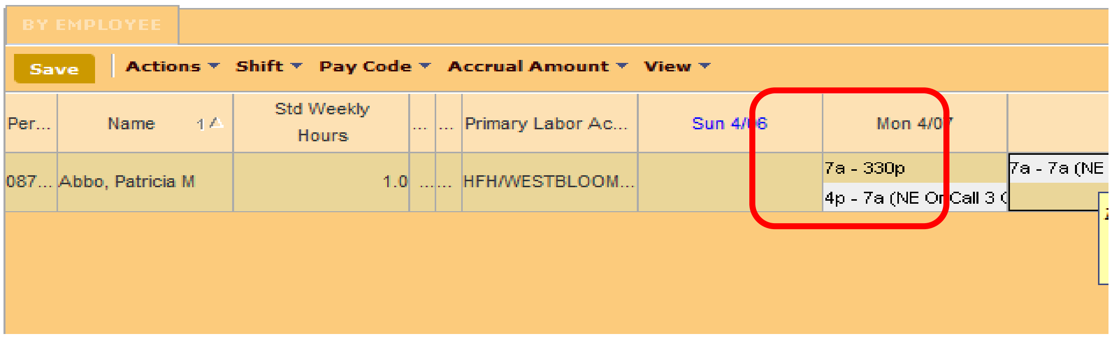
# Transferring to an On Call Work Rule

There are special considerations when transferring an employee to an On Call work rule and they are also scheduled for regular work ON THE SAME DAY.

## Employee Scheduled for Regular BEFORE On Call

When an employee is scheduled for Regular time BEFORE their On Call time on the same day, you must create **TWO** separate shifts on the same day. This results in **TWO** separate rows in your scheduler.

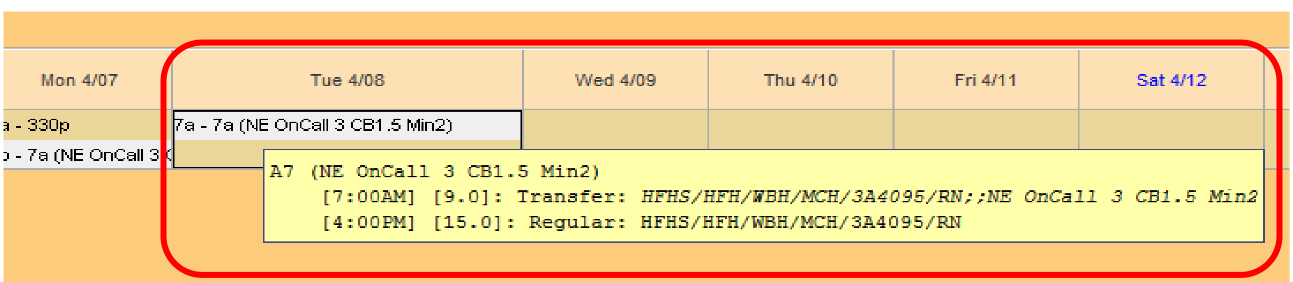
Notice how **Monday, 4/07** in the screen shot below has the Regular time on one row and the On Call time in a SEPARATE row. Also notice that the Regular time is BEFORE the On Call the time.




## Employee Scheduled for Regular AFTER On Call

When an employee is scheduled for Regular time AFTER their On Call time on the same day, you must create **ONE** shift for that day that includes both the On Call time and the Regular time. This results in **ONE** row in your scheduler.

Notice how **Tuesday, 4/08** in the screen shot below has both On Call time and the Regular time included in a single shift. Also notice that the Regular time is AFTER the On Call time.



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