KRONOS®

Website: https://coh.kronos.net/wfc/navigator/logon

Supervisor Manual

Managing Timecards and Schedules

Reference Guide

http://www.houstontx.gov/ara/payroll.html

Document Revision	Product Version	Release Date
A	Managing Timecards and Schedules v6.1	January 2011
B	Managing Timecards and Schedules v6.1	August 2011
C	Managing Timecards and Schedules v7.0	May 2015

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Getting Started

Importance and Benefits of Kronos

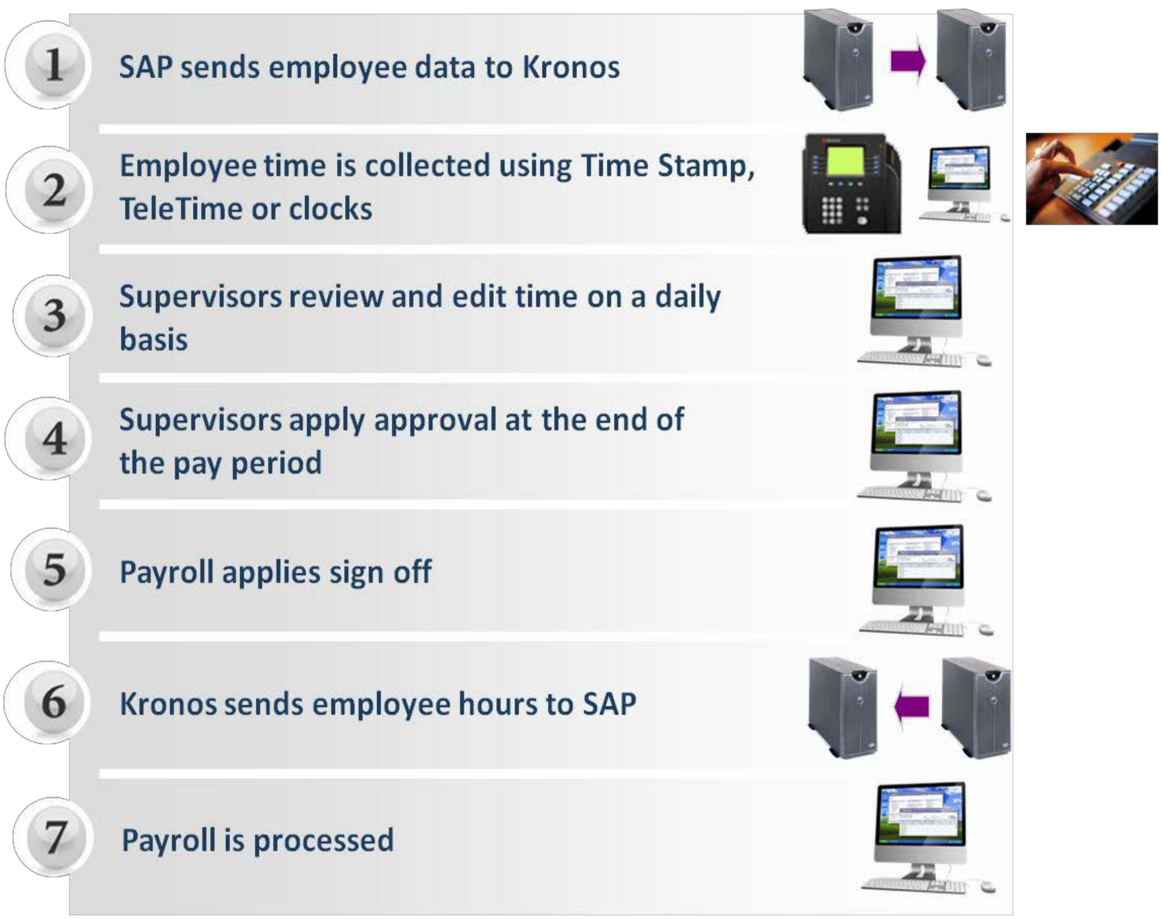
Purpose

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.

The following are the benefits that Kronos provides to the City of Houston:

- Automates and simplifies your timekeeping and scheduling tasks
- Saves both time and money
- Assists with scheduling standardization and policy enforcement
- Improves time and attendance tracking
- Enables better end-to-end timekeeping
- Automates the time-off request process

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



Roles and Responsibilities

Purpose

Each employee and timekeeper/supervisor 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:

- Clock in and out according to scheduled shifts
- Approve their timecard (optional)
- Submit requests for time off

Common Timekeeper/Supervisor Tasks

On a daily basis, timekeepers/supervisors perform the following tasks:

- Review employees' time using a Genie
- Manage timecard edits and schedules

On a pay period basis, timekeepers/supervisors perform the following tasks:

- Run reports
- Perform final review and approve timecards **(MANDATORY)**

Common Payroll Department Tasks

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

- Perform a final review of employee timecards
- Sign off timecards
- Extract time data from the application to send to the payroll system
- Perform historical edits

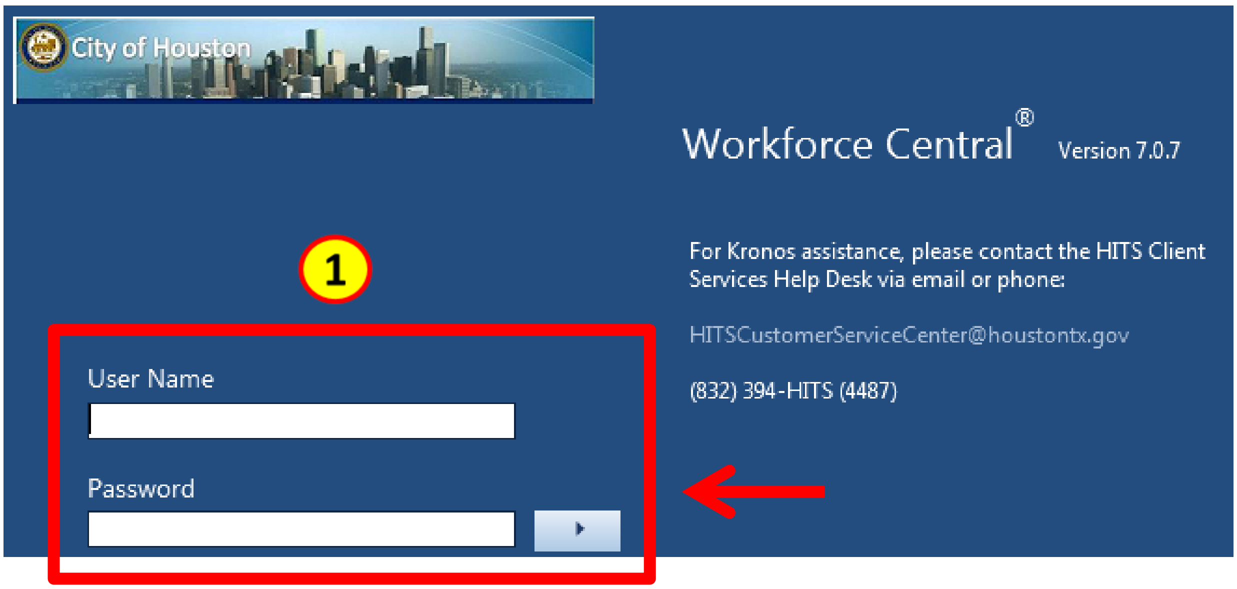
Logging On

Purpose

The Kronos **log on** page provides access to all the features for performing your time and attendance tasks.

Example

You, as the timekeeper/supervisor, log on to the Kronos application at least once a day to review and work with your employees' timecards and scheduling data.



Steps	
1	Type your **User Name** and **Password** in their designated fields.
2	Click **Log On** button or press **Enter** key on the keyboard.

Note

Users will log on using their City of Houston network user name and password will be "password". You will reset @ initial logon.

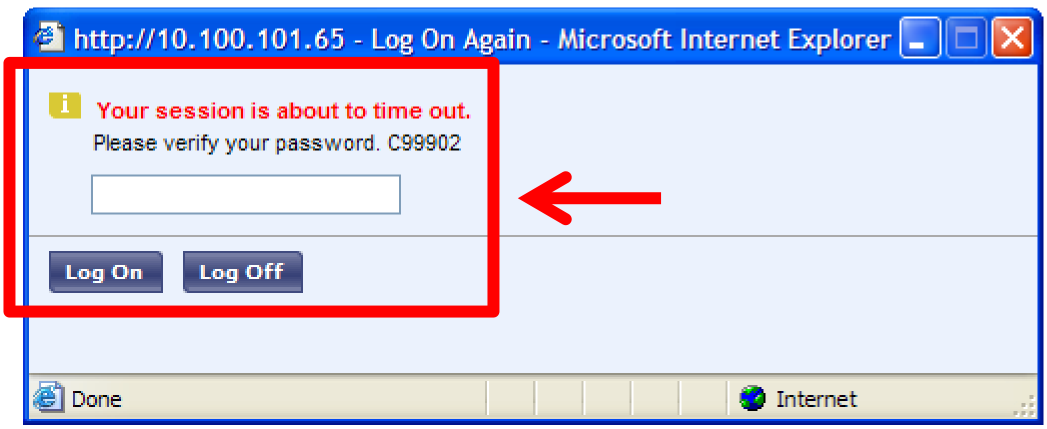
Logging Off Kronos

Purpose

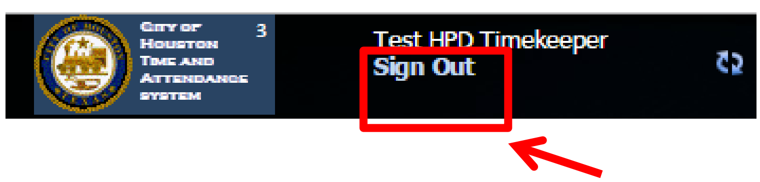
The application provides security to prevent other people from accessing your information and helps keep your employees' information confidential.

Regaining access after the inactivity timeout

Inactivity timeout protects sensitive information in the application. If the application does not detect activity within a specific amount of time, it automatically logs you off. To regain access to the application, you must re-enter your password in the inactivity timeout screen. When you regain access, the application restores the last page you were viewing.



Upon completion of your tasks, you must **Sign Out** the application to ensure that your employees' information is kept confidential.



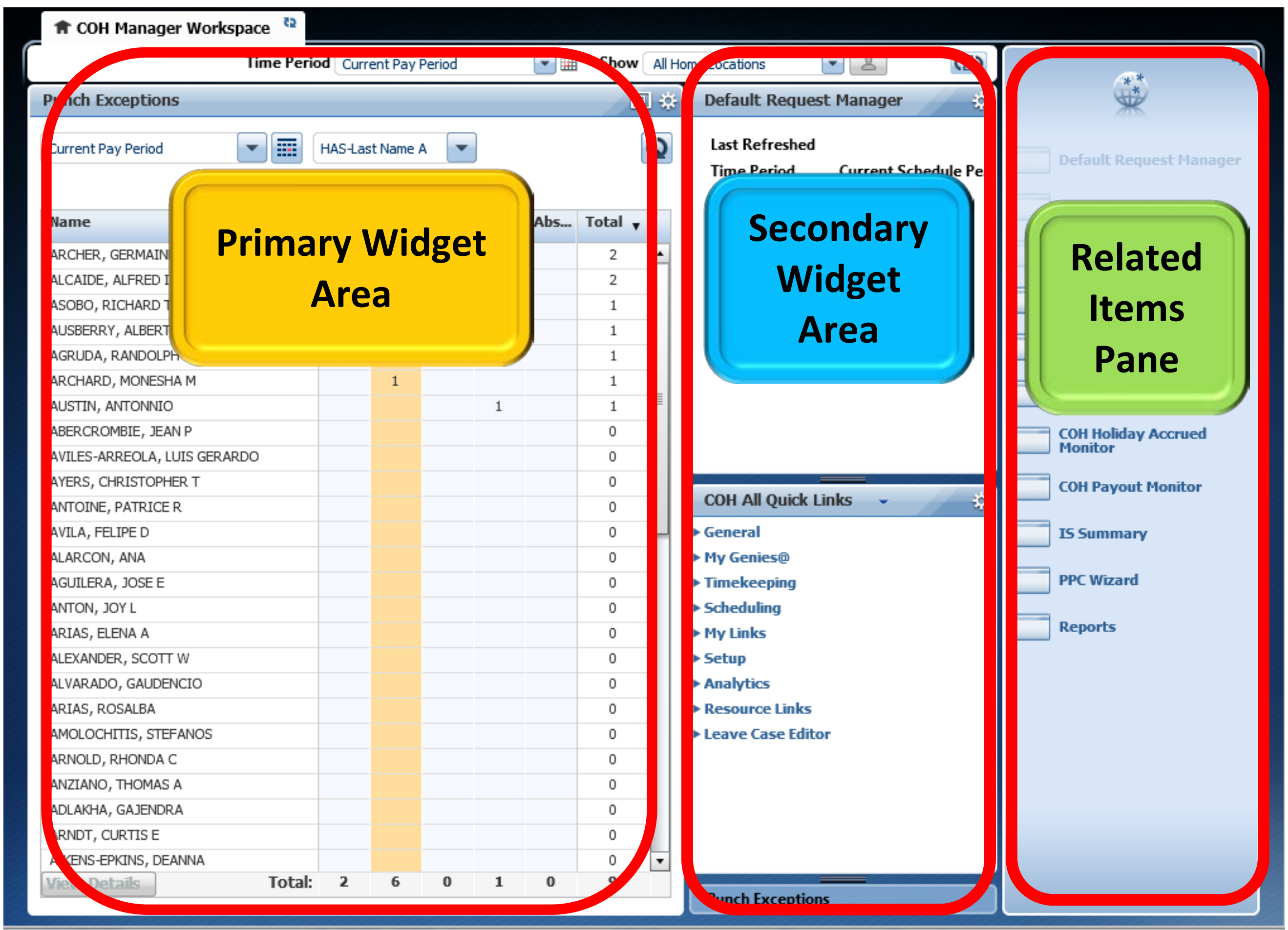
Note Users will log on using their City of Houston network user name and password. The inactivity timeout screen appears if there is no activity in Kronos for 30 minutes.	
Caution If you do not log in after an inactivity timeout, you will lose all unsaved edits.	

Navigating Kronos Pages

Purpose

The page displayed will appear on the ***Manager's Workspace only***. You'll see your employees Punch Exceptions in your Primary Widget Area; Default Request Manager and COH All Quick Links in your Secondary Widget Area; All other Widgets will be located in your Related Items Pane.

A **Genie** is a pre-defined view that summarizes and organizes information according to common tasks you perform on a regular basis. The name of the Genie reflects a common task, such as Reconcile Timecard.



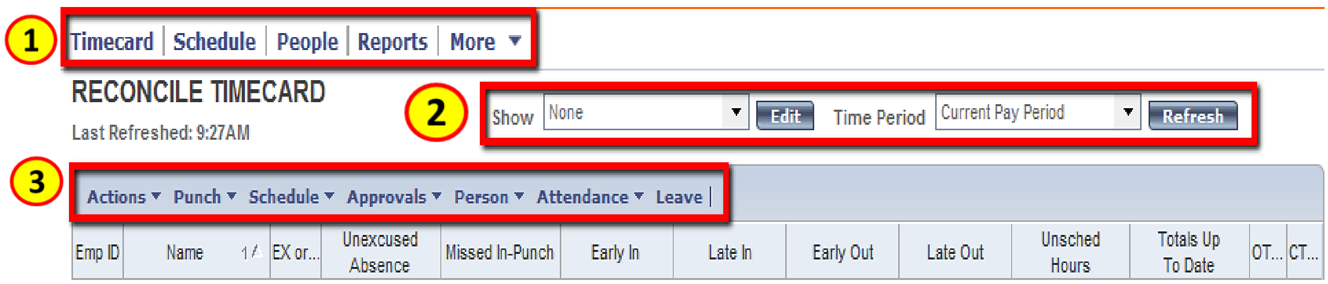
Using the tools within the workspace

Quick links are located at the top of the workspace and allow you to access information specific to one or more employees. For Example, you can select one employee and click the Timecard quick link to access his or her timecard. Or, you can select multiple employees and click the Schedule quick link to view schedules for just those employees.

The **Show** field allows you to display a group of employees. The default setting for the **Show** field when you log on is **All Home**, which displays all employees that report to you. You can use the **Show** field to further refine your selection to include employees in a specific group, such as only those employees that are working in a particular area, or on a particular shift.

The **Time Period** field allows you to determine the timeframe you want to view, such as the **Current Pay Period**, or a particular timeframe in the past. The **time period** you select determines what you will see on that page.

The Menu Bar contains tasks that you can perform on the page. Each Menu Bar is specific to the page you are currently viewing.



Steps	
1	➢ In the workspace area, highlight the employees for whom you need to access data.
2	➢ To access timecards, click **Timecard** quick link. ➢ To access the Schedule Editor, click **Schedule** quick link. ➢ To access the People Editor, click the **People** quick link. ➢ To run reports, click the **Reports** quick link.

Tip

There are various ways to select multiple employees before using a quick link:

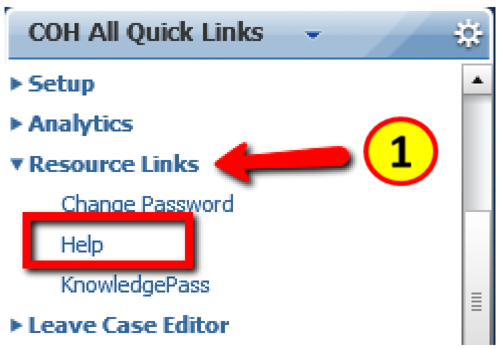
- To select multiple employees listed adjacent to each other
  - Click the first name, then hold down the **Shift** key and click the last name, or
  - Click one employee and drag the mouse up or down to select other employees
- To select multiple employees that are not listed adjacent to each other, click one name, then hold down the **Ctrl** key and click additional employee names

Using Online Help

Purpose

The application contains a context-sensitive online Help system to help you perform timekeeping tasks.

Steps	
1	Go to **COH All Quick Links > Resource Links > Help**
2	This link displays a Help topic specific to where you are in the application.



Component	Description
Contents tab	Collection of topics.
Index tab	Alphabetical directory of all Help topics.
Search tab	Tool for entering a specific word or phrase; topics appear with percent rankings that identify their relevance.
View/Hide Helper Tabs	Displays or hides related topics and terms.
Show Full Screen/Show Headers	Hides or displays the banner within the Help topic page.
Topics List	Available topics to select. If you are on the Search tab, the rank number identifies the relevancy of the topic to the entered search data.

Scheduling Employees

Schedule Editor Overview

Purpose

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

Using the **Schedule Editor**, you can:

- Add, edit, and delete shifts
- Add pay codes for worked or non-worked hours
- Schedule labor transfers

Areas	Description
Name column	Lists the employee names.
Totals column	Displays total number of scheduled hours by employee for the selected time period, with lunch deducted if applicable.
Date cells	For each day in the selected time period, displays shift start and end time. A date cell can also display pay codes to identify scheduled non-worked hours.
Scheduled Hours row	Displays total number of scheduled hours for all employees for the selected time period and for each date displayed.
Number of Employees row	Displays the total number of employees used to calculate total Scheduled Hours.

Steps	
1	Select **Scheduling > Schedule Editor**
2	Select **All Home** from the **Show** drop-down list to view all the employees you are authorized to view.
3	Select the specific time period from the Time Period drop-down list. (The default is **Current Schedule Period**.)

Assigning Exempt Employees to a Schedule Group

Purpose

A schedule group is selected in Kronos for “**Exempt employees”** to match their schedule group in SAP. The Schedule Group is selected based on the days worked in the pay period and the number of hours per day. A Schedule Group for an exempt employee must be effective from the first day of a pay period. Do not change the Schedule Group for an exempt employee effective in the midst of a pay period.

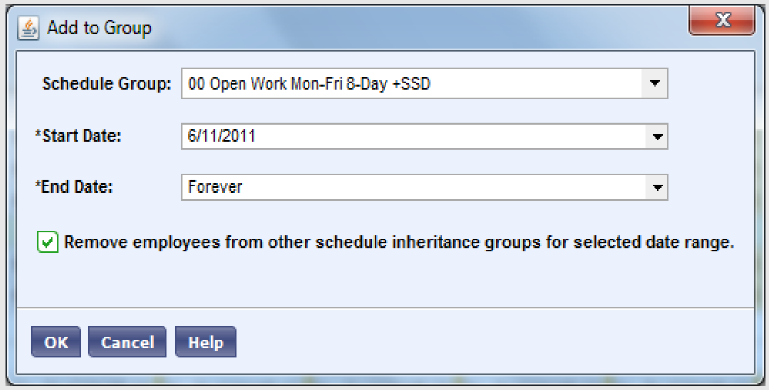
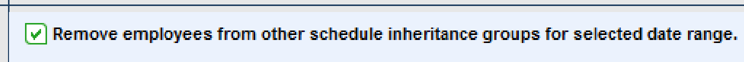
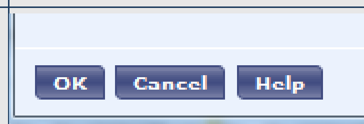
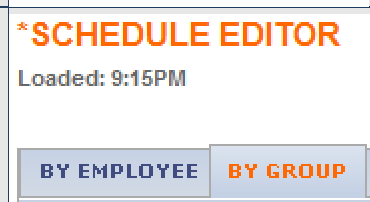
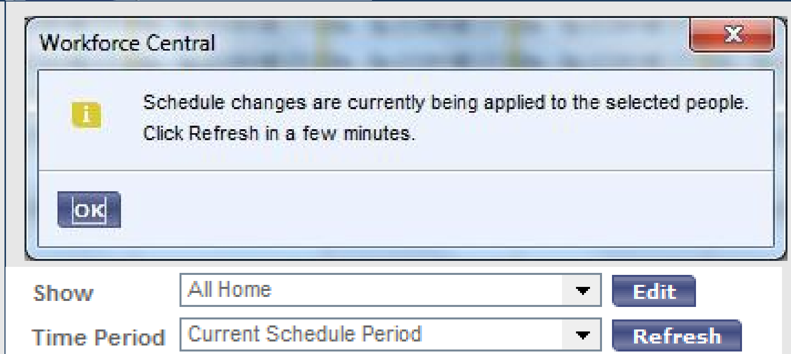
Note

The start and end times will be added via the Shift Editor separately from the Schedule Group.

Example

An exempt employee works 8 hours per day Monday thru Friday with Saturday and Sunday off. Add the employee to the “**00 Open Work Mon- Fri 8-Day +SSD**” Schedule Group.

Steps	
1	Select **Scheduling > Schedule Editor** and click the **By Group** tab.
	Select the employee that you want to assign to a schedule group. To select multiple employees, hold the **Ctrl** key and single-click each employee’s name.
2	In the **Kronos Tool Bar** Select **Group > Add to Group**.

Steps		
4	From the **Schedule Group** drop- down list, select the name of the schedule group to which you want to assign the exempt employee(s). ***Only select a "00 Open" Schedule Group***.	
5	In the **Start Date** drop-down list, select the first day of the pay period for the effective date.	
6	In the **End Date** drop-down list, select the last date that the schedule group assignment is effective. For the assignment to be in effect with no end date, select **Forever**.	
7	Leave the box checked for *"Remove employees from other schedule inheritance groups for selected date range."*	
8	Click **OK**	
9	Click **Save**	
10	Click **OK** and then click **Refresh** until contrast returns.	

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 page name turns orange and an asterisk appears next to it to let you know that your data is not yet saved. After you save the data, the visual indicators no longer appear.

Canceling edits

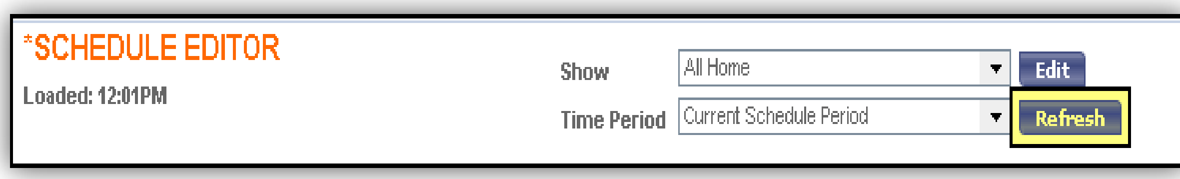
The application does not save your edits until you tell it to do so. Until that time, you can remove or cancel your edits using the **Refresh** button. When you click **Refresh**, the application re-displays the most recently saved information, overwriting your unsaved edits.

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.

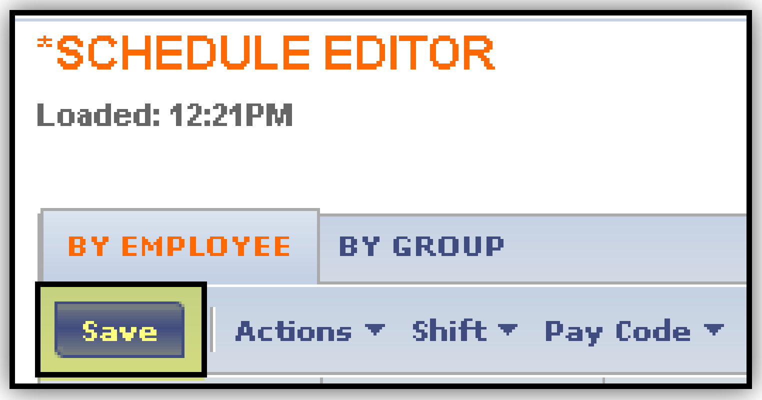
Canceling edits

Steps	
1	Perform your edits to a schedule. Note the visual indicators that indicate unsaved data.
2	Click **Refresh** and review the schedule information.
3	Do you want to cancel your changes? To cancel your changes, click - **Yes** To keep your changes, click - **No**



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, validating that your information was saved.



Removing Employees from a Schedule Group

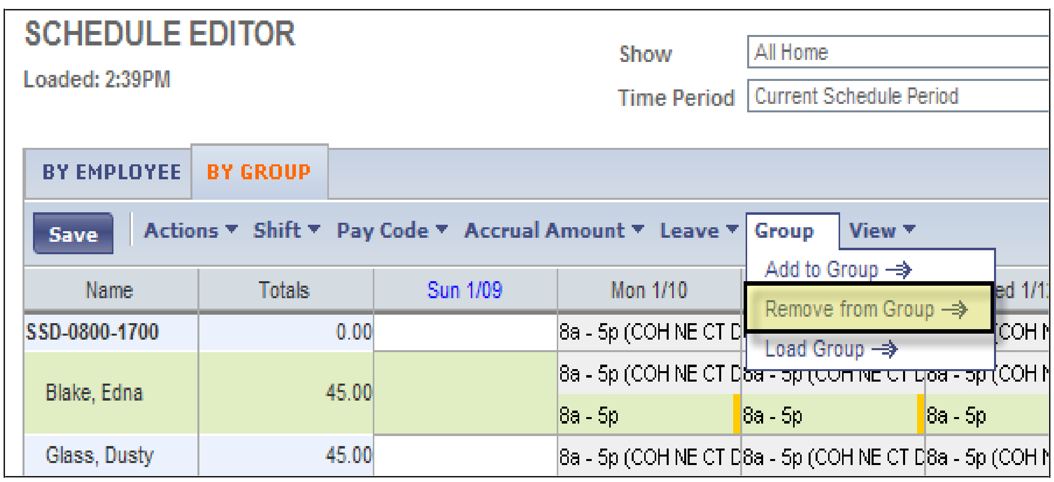
Purpose

Sometimes an employee is incorrectly assigned to a schedule group or needs to move from one schedule group to another. In either case, you would need to remove the employee from the schedule group.

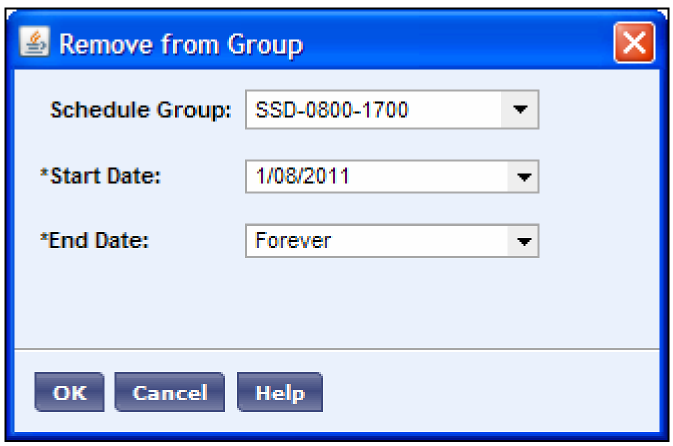
Example

You assigned an employee to the Day 8:00 A.M. to 5:00 P.M. Monday through Friday schedule group in error. Remove the employee from the erroneous group.

Steps	
1	Select **Scheduling > Schedule Editor** and click the **By Group** tab.
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 you want to remove from the schedule group. To select multiple employees, hold the **Ctrl** key and single-click each employee’s name.
4	Select **Group > Remove from Group**.



Steps	
5	From the **Schedule Group** drop- down list, **select the name of the schedule group** from which you want to **remove** the employee from.
6	From the **Start Date** drop-down list, specify the effective date to remove the employee from the schedule group.
7	From the **End Date** drop-down list, specify the date the removal is no longer in effect. To remove the employee from the schedule group indefinitely, select **Forever**.
8	Click **OK** and then click **Save**.
9	Click **Refresh** in the header.
10	Confirm that the employee(s) were removed from the schedule group.



Tip

Removing an employee from a schedule group does not affect that employee's schedule assignment.

Business practice

Contact the Payroll Help Desk via e-mail payroll@houstontx.gov or call (823-393-8900) Municipal/Classified Depts.) to request a new pattern template.

Creating a Schedule Pattern without a Pattern Template

or

Making a schedule change for an employee with a current or future date (See Step 8)

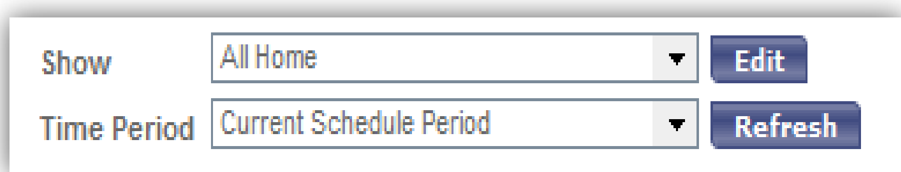
Purpose

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

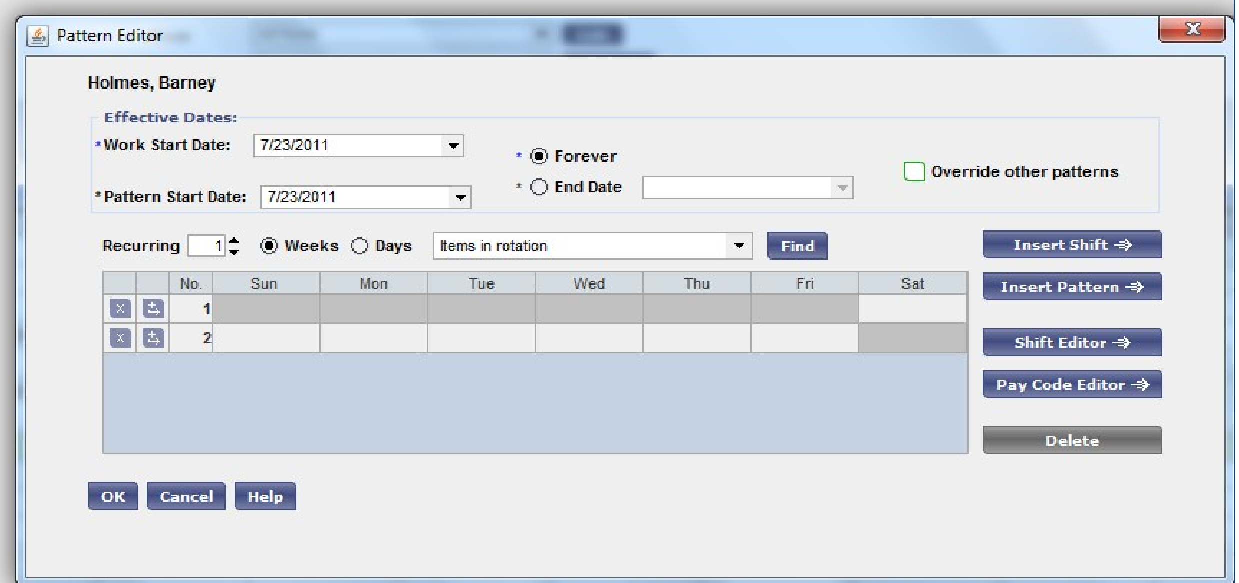
Example

An Employee is working a schedule that is not an established schedule pattern. Create an ad hoc pattern for the Employee.

Steps	
1	Select **Scheduling > Schedule Editor**.
2	Select the specific time period from the **Time Period** drop-down list. ***Defaults to "Current Schedule Period"***
3	Select the employee who you will schedule using a pattern. To select multiple employees, hold the **Ctrl** key and click each employee's name.
4	In the **Kronos Tool Bar** Select **Shift > Add Pattern**. <u>NOTE: Do not double click on the employee's name.</u>



<table>
<tr><th colspan="2">Steps</th></tr>
<tr><td>5</td><td>From the Work Start Date drop- down list, specify the date when the employee(s) starts working the schedule pattern.

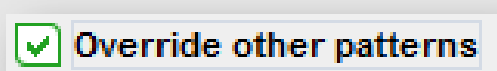
Normally this is the first day of the pay period week. Dates selected must be within the selected date range of the Schedule Editor.</td></tr>
<tr><td>6</td><td>

From the Pattern Start Date drop- down list, specify the date when the schedule pattern starts.

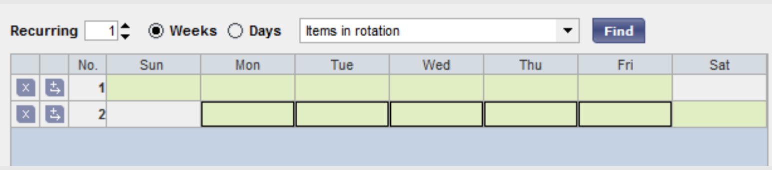
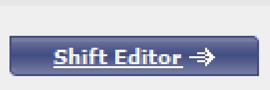
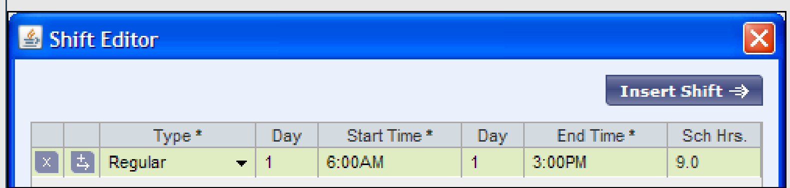
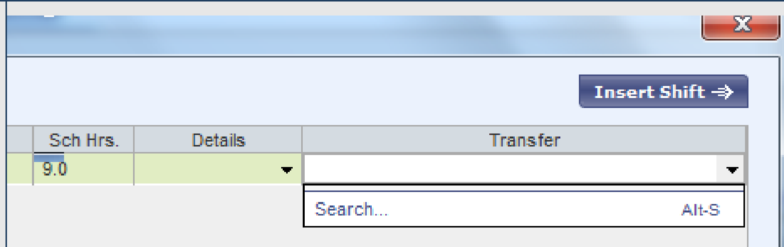
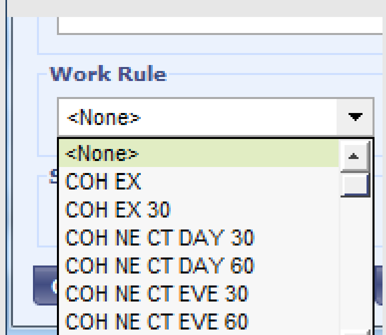
Normally this is the first day of the pay period week.

The Pattern Start Date may not be later than the “Work Start Date”.</td></tr>
<tr><td>7</td><td>From the End Date drop-down list, specify the last date the pattern is effective. To have the assignment in effect with no end date, select Forever.

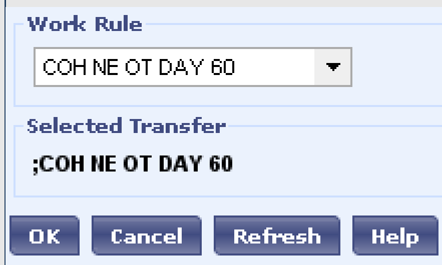
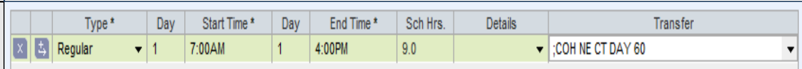
</td></tr>
<tr><td>8</td><td>To replace all other assigned schedule patterns with the new schedule pattern, select the Override other patterns check box.

<u>Check this box if you are making a schedule change for an employee with a current or future date.</u>

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

Steps

9	Set the **Recurring** field to the correct interval, for Example, days or weeks, and the number of days or weeks the pattern repeats.	
10	Click the cell of each day that applies to the schedule pattern. To select multiple days hold the **Ctrl** key and single-click the appropriate cells.	*Note: Select the open cells not the cells that are grayed out.*
11	Click **Shift Editor**.	
12	Enter the shift start and end times in the designated boxes. "**TAB**" over to "**Sch. Hrs.**" to verify the daily scheduled hours. (i.e. 9.0= 8 hrs. work w/ a 1hr. lunch)	
13	Select the drop down delta in the **Transfer** field to select **Search** and pick the "**Work Rule**" which is located at the bottom left corner of the panel. **Work Rule Attributes:** **Status:** EX-Exempt, NE-Non-Exempt **Add'l Hours:** CT- Comp Time, OT-Overtime **Shift**: DAY, EVE or NIT **Lunch Deduct**: 30 or 60 Minute	

Steps		

<table>
<tr><td>14</td><td>Click OK</td><td>
</td></tr>
<tr><td>15</td><td>Verify your shift times and work rule then Click OK</td><td>
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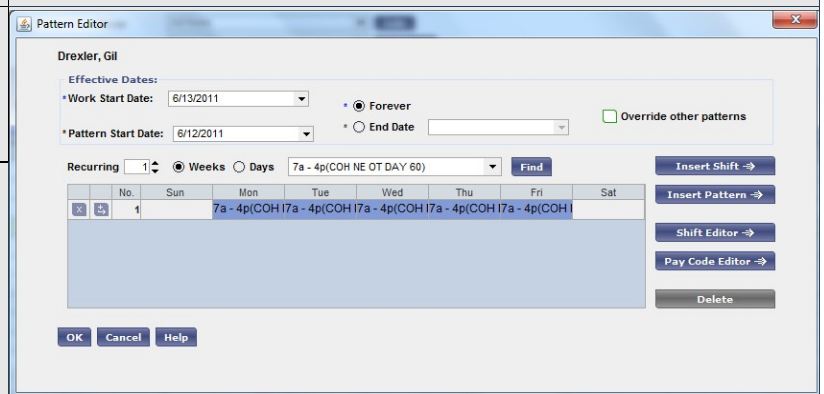
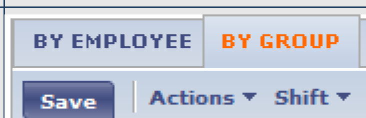
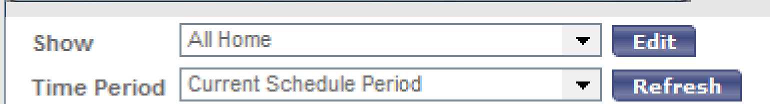
<tr><td></td><td></td><td rowspan="2">
</td></tr>
<tr><td>16</td><td>Verify your pattern and Click OK</td></tr>
<tr><td>17</td><td>Click Save.</td><td>
</td></tr>
<tr><td>18</td><td>Click OK and then click Refresh
until contrast returns.</td><td>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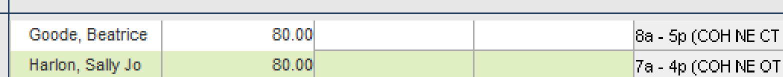
<tr><td></td><td></td><td>
</td></tr>
</table>

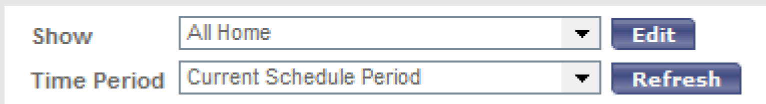
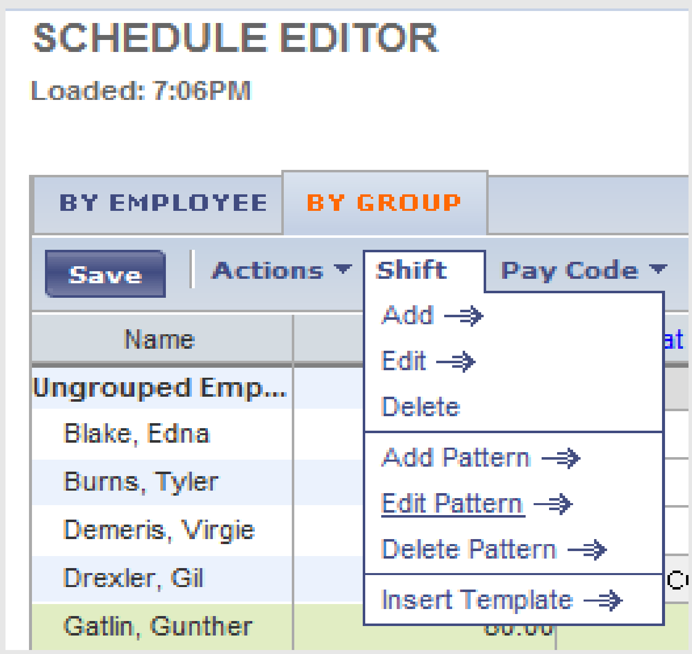
Editing a Schedule Pattern

Purpose

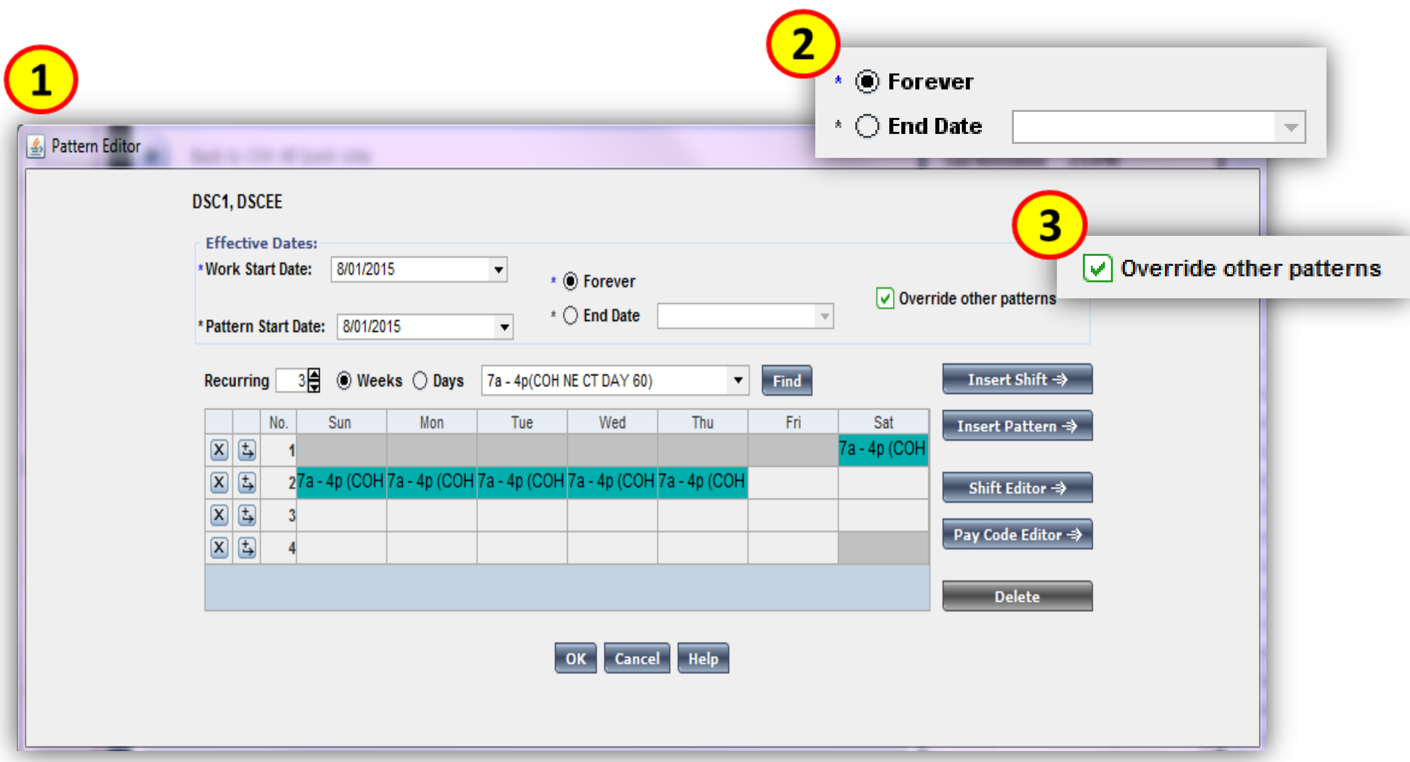
An employee requires their schedule to be corrected. This edit is **to correct a schedule not to change a schedule** going forward. The date selected must include any pay periods that **have not** yet been signed off.

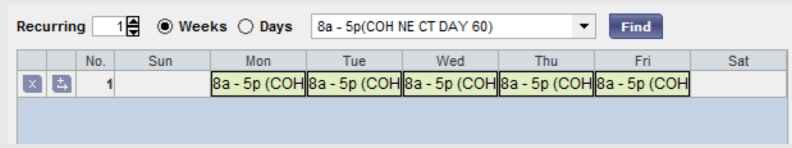
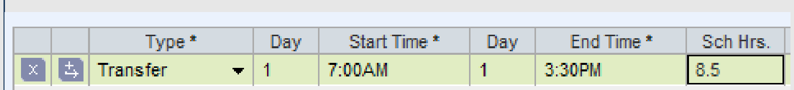
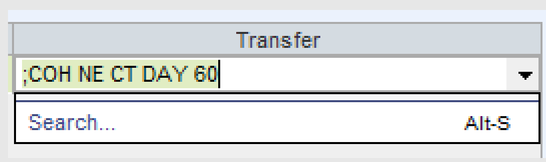
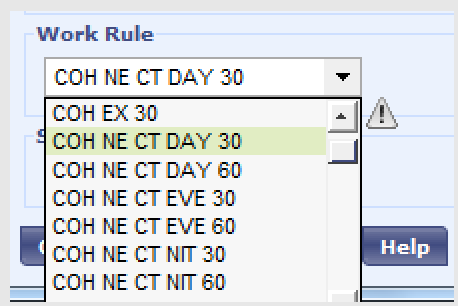
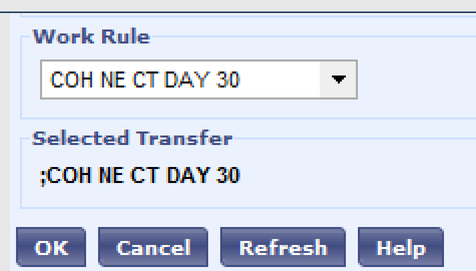
Example

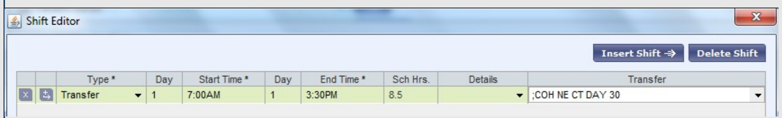
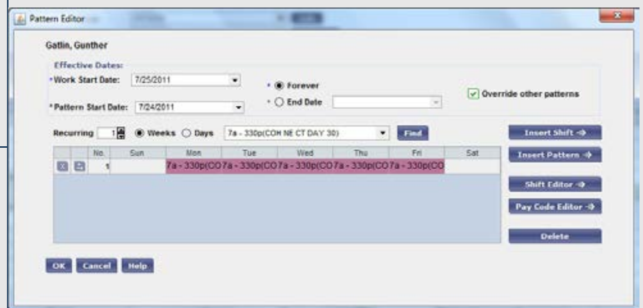
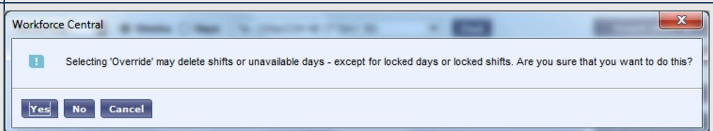
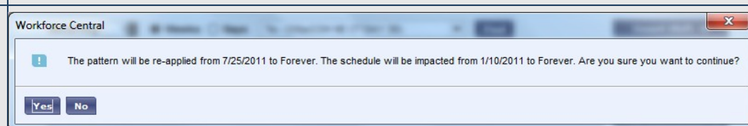
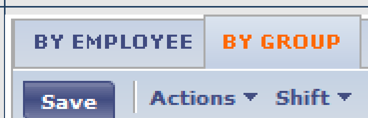
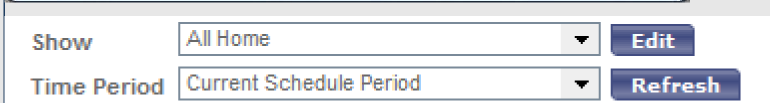
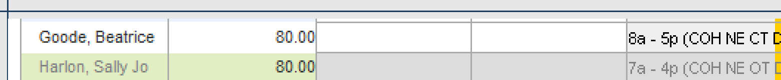
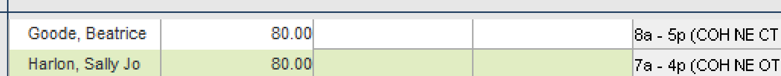
The employee was initially scheduled 8a-5p Mon-Fri with a 60 minute lunch. The correct schedule should have been 7a-3:30p with a 30 minute lunch.

Steps		
1	Select **Scheduling > Schedule Editor**.	
2	Select the specific time period from the **Time Period** drop-down list. ***Defaults to "Current Schedule Period"***	
3	Select the employee who you will schedule using a pattern. Edit Pattern must be performed on each employee separately.	
4	In the **Kronos Tool Bar** Select **Shift > Edit Pattern**.	

Steps	
5	From the **Work Start Date** drop- down list, specify the effective date for the correction to occur. ***Normally this is the first day the employee will work in the selected date range.*** ***Dates selected must be within the selected date range of the Schedule Editor.***
6	From the **Pattern Start Date** drop- down list, specify the effective date when the schedule pattern starts. ***Normally this is the day before or the same day as the Work Start Date.*** ***The Pattern Start Date may not be later than the "Work Start Date".***
7	From the **End Date** drop-down list, specify the last date the pattern is effective. To have the assignment in effect with no end date, select **Forever**.
8	Leave the **Override other patterns** check box checked.



Steps		
9	Set the **Recurring** field to the correct interval, for Example, days or weeks, and the number of days or weeks the pattern repeats.	
10	Click the cell of each day that applies to the schedule pattern. To select multiple days hold the **Ctrl** key and single-click the appropriate cells.	*Note: Select the open cells not the cells that are grayed out.*
11	Click **Shift Editor**.	
12	Enter the shift start and end times in the designated boxes. "**TAB**" over to "**Sch. Hrs.**" to verify the daily scheduled hours. (i.e. 8.5 = 8 hrs. work w/ a 30 minute lunch)	
13	Select the drop down delta in the **Transfer** field to select **Search** and pick the "**Work Rule**" which is located at the bottom left corner of the panel. **Work Rule Attributes:** **Status:** EX-Exempt, NE-Non-Exempt **Add'l Hours:** CT- Comp Time, OT- Overtime **Shift**: DAY, EVE or NIT **Lunch Deduct**: 30 or 60 Minute	
14	Click **OK**	

Steps		
15	Verify your shift and Click **OK**	
		
16	Verify your pattern and Click **OK**	
17	Click **YES** to override other patterns going forward.	
18	Click **YES** to correct the schedule.	
19	Click **Save**.	
20	Click **OK** and then click **Refresh** until contrast returns.	
		
		

Editing a Shift

Purpose

When your workload needs vary, you may need to change employees' schedules in order to reduce the number of exceptions that might appear in employee timecards.

Example

You scheduled an employee to work eight hours on Saturday. You now only need the employee for four hours, so you edit the employee's shift for Saturday to reflect the new shift times.

Steps		
1	Select **Scheduling >Schedule Editor**.	
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 click the cell in that row and under the date that contains the shift that you want to edit. **(Be sure the "Transfer Work Rule" is included (COH …..)**	See screenshot table below
4	Edit shift start and/or end times and press **Tab**.	
5	Click **Save**.	

Name 1	Totals	Fri 1/14	Sat 1/15	Sun 1/16
Demeris, Virgie	40.00	8a - 5p		
Drexler, Gil	32.00			
Gatlin, Gunther	8.00		8a - 3p	
Scheduled Hours	472.00	80	8	0
Number of Emplo...	18	10	1	0

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. The configuration of the system determines the default time format. You can also copy and paste shifts using Ctrl-C and Ctrl-V.

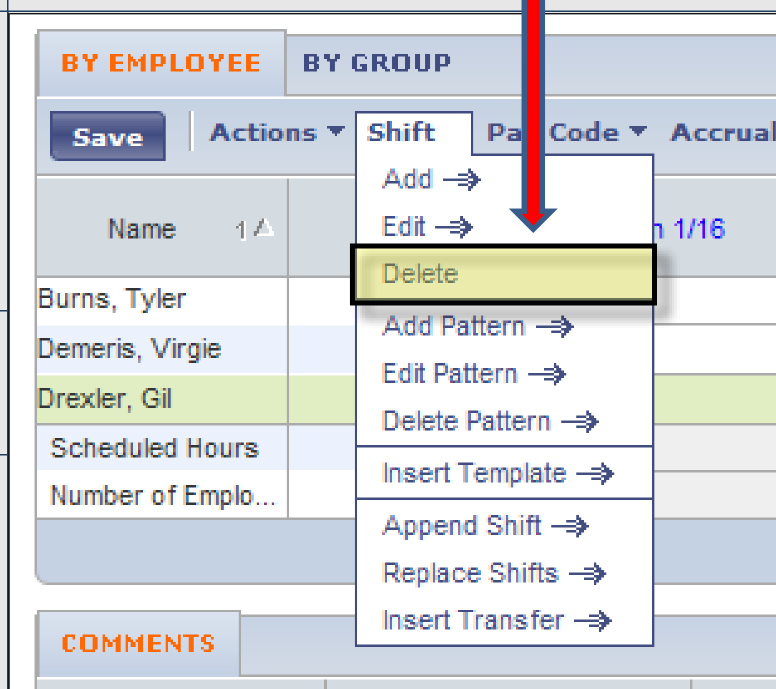
Deleting a Shift

Purpose

Because staffing needs can change, an employee that is scheduled to work a shift may no longer be needed. 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 is currently scheduled to work on Friday and is no longer needed. You remove the shift on Friday to avoid an unexcused absence.

Steps		
1	Select **Scheduling >Schedule Editor**.	
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 click the cell in that row and under the date that contains the shift you want delete.	
4	Select **Shift > Delete**.	
5	Click **Save**.	

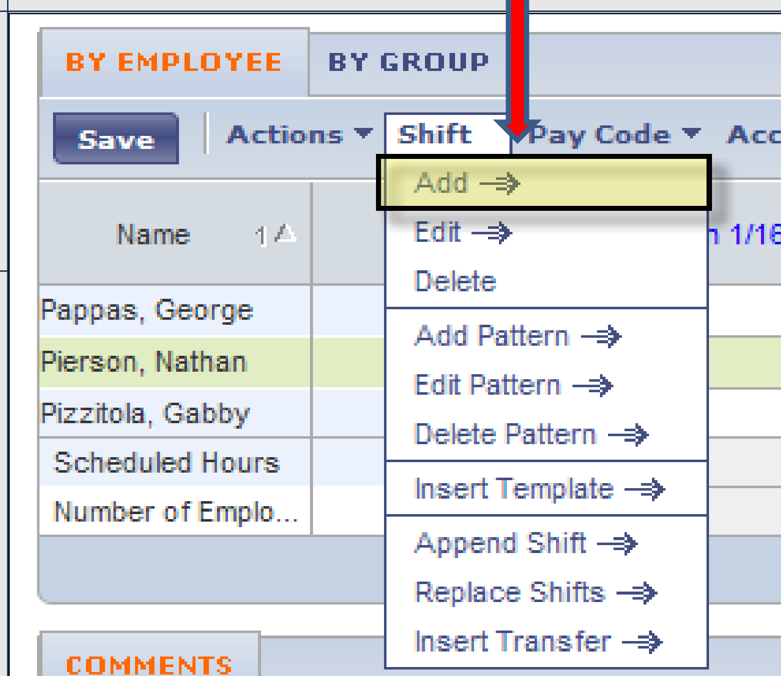
Scheduling a Transfer for a Full Shift

Purpose

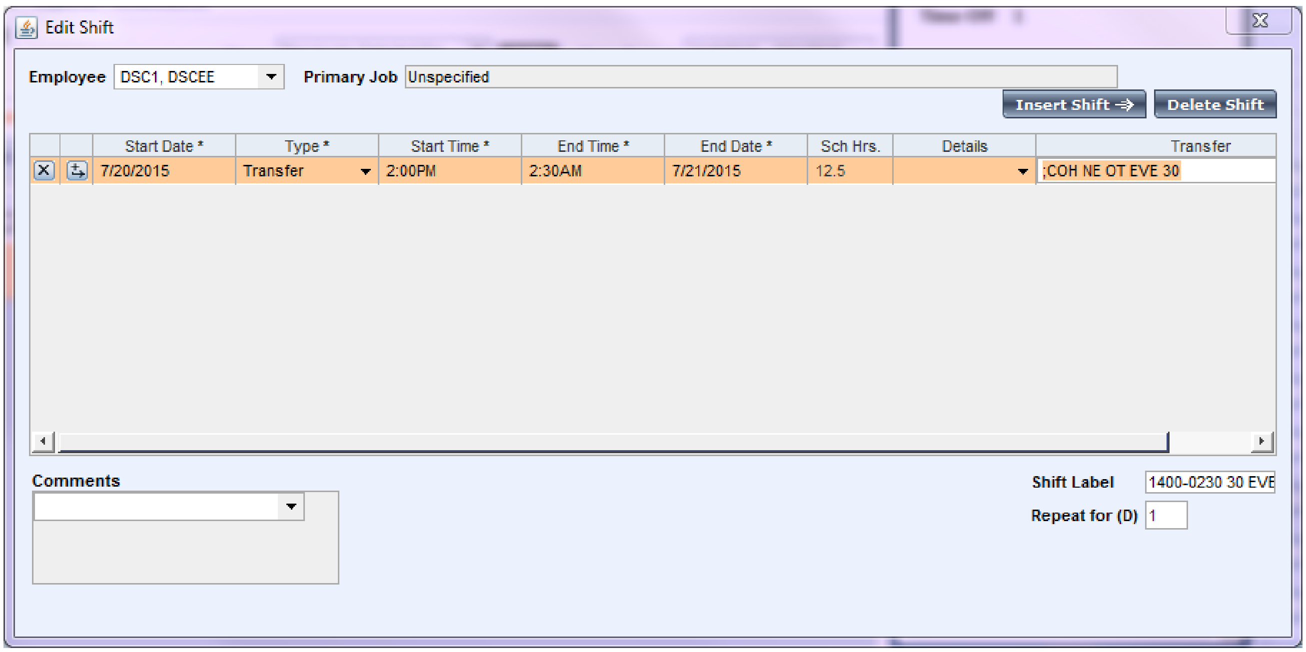
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule. You need to record the transfer in the application so that the right labor account is charged and the right work rule is applied. You or the employee can record the transfer at a clock or directly in the schedule or timecard.

Example

On Wednesday of the next schedule period, you need an employee to work his entire shift assigned to a specific grant. Schedule the employee to work in the grant 8:00 A.M. to 5:00 P.M. on Wednesday of the next schedule period.

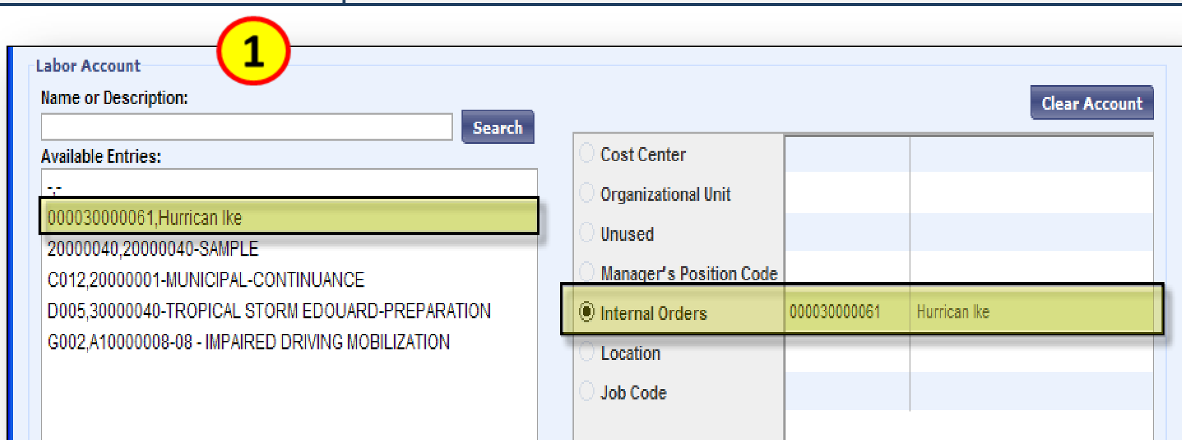
Steps		
1	Select **Scheduling >Schedule Editor**.	
2	Select the specific set of employees from the **Show** drop- down list. Select the specific time period from the **Time Period** drop- down list.	
3	Locate the employee's row and click the cell in that row and under the date where you want to add a shift that requires a transfer.	
4	Select **Shift > Add**.	

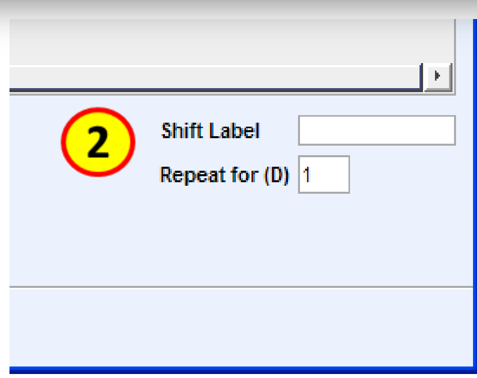
Steps	
5	In the Shift Editor, confirm that the correct date appears in the **Start Date** field.
6	From the **Type** drop-down list, select the Transfer shift type.
7	In the **Start Time** field, enter the time the shift starts and press **Tab**.
8	In the **End Time** field, enter the time the shift ends and press **Tab**.
9	Confirm that the date in the **End Date** field is correct. If the shift crosses a day divide, you need to change the shift's end date to the following day.
10	Click the **Transfer** drop-down list and select **Search**.

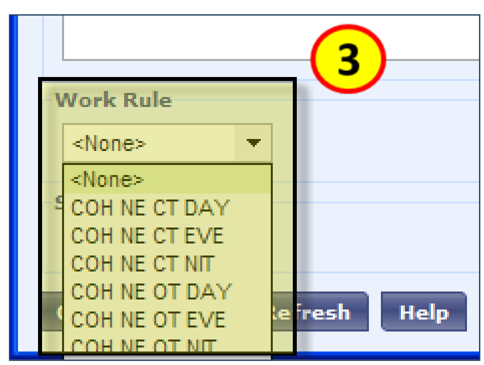


Steps	
11	What kind of transfer(s) do you want to perform using the **Select Transfer** dialog box? To transfer hours to another labor account, click a labor level option and select the labor level from the **Available Entries** list. To transfer hours to another work rule, select the work rule from the **Work Rule** drop- down list.
12	Click **OK**.
13	(Optional) In the **Repeat for (D)** field, enter the number of consecutive days you want the transfer to last.
14	Click **OK** and then click **Save**.

Visual indicator	Definition
(x)	Labor account transfer associated with a shift
(work rule)	Work rule transfer associated with that shift







Adding Shifts with (Partial Day) Transfers

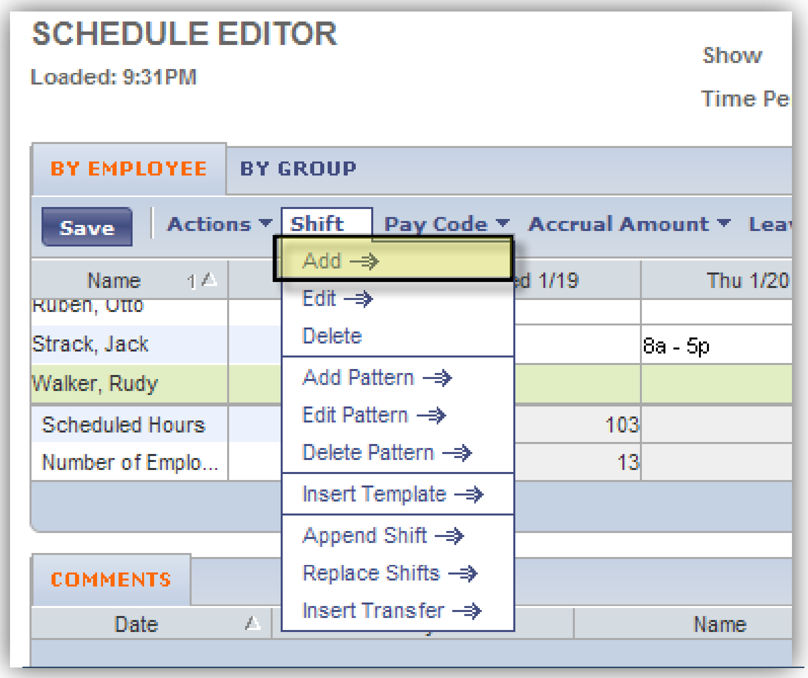
Purpose

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. You or the employee can note the transfer at a clock or directly in the schedule or timecard.

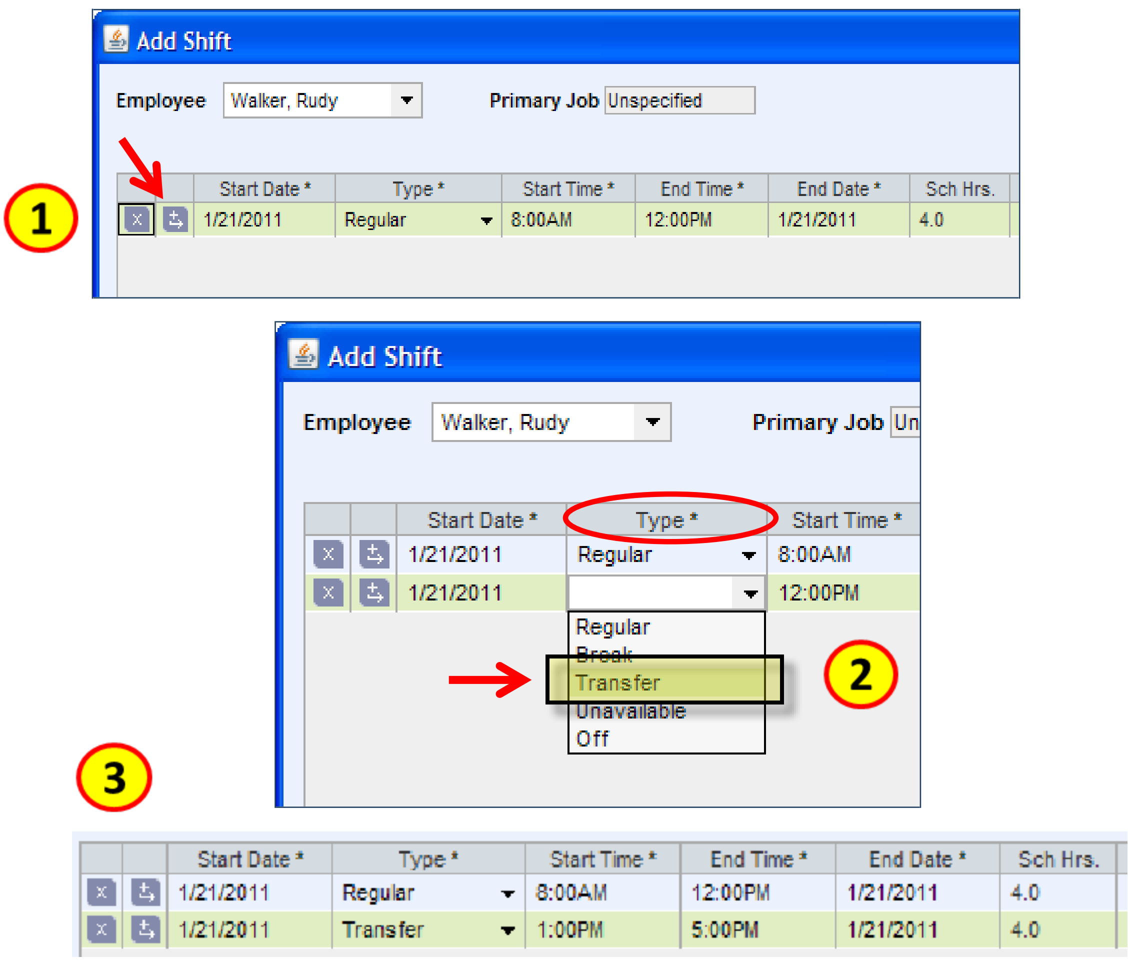
Example

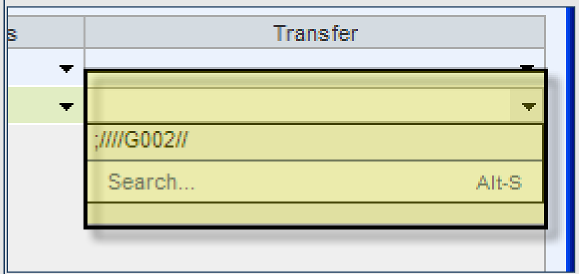
Schedule an employee to work part of her shift, 1:00 P.M. to 5:00 P.M. in a specific grant on Friday of the next schedule period.

Steps	
1	Select **Scheduling >Schedule Editor**.
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 click the cell in that row and under the date where you want to add a shift that requires a transfer.
4	Select **Shift > Add**.

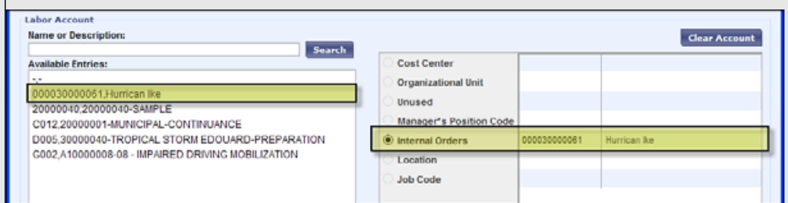


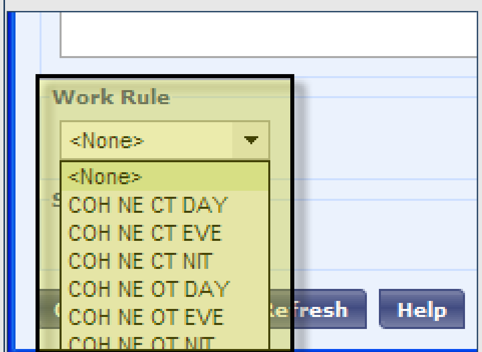
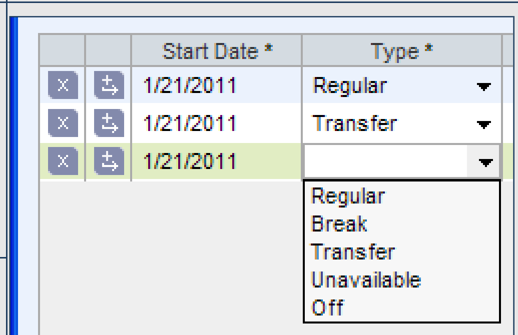
Steps	
5	In the Shift Editor, confirm that the correct date appears in the **Start Date** box.
6	For the hours the employee is scheduled to work before the transfer, fill in the **Start Time** and the **End Time** fields.
7	Click the **Insert Row** icon.
8	From the **Type** drop-down list, select the **Transfer** shift type.
9	In the **Start Time** field, confirm the time the shift transfer begins and press **Tab**.
10	In the **End Time** field, enter the time the shift transfer ends and press **Tab**.
11	Confirm that the date in the **End Date** box is correct. If the shift crosses the day divide, you need to change the shift's end date to the following day.

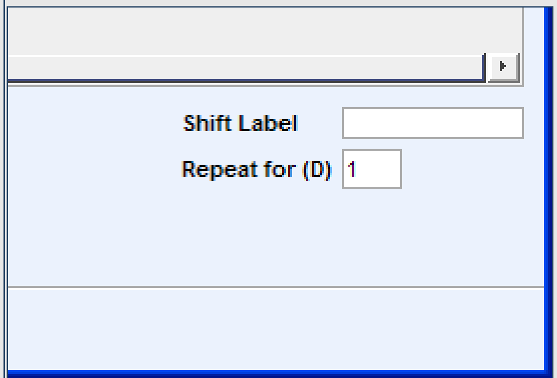


<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>12</td><td>Click the Transfer drop-down list and select the transfer from the list or click Search.</td><td>
</td></tr>
<tr><td>13</td><td>What kind of transfer(s) do you want to perform using the Select Transfer dialog box?

To transfer hours to another labor account, click a labor level option and select the labor level from the Available Entries list.

To transfer hours to another work rule, select the work rule from the Work Rule drop-down list.</td><td>


</td></tr>
<tr><td>14</td><td>Click OK.</td><td></td></tr>
<tr><td>15</td><td>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.</td><td>
</td></tr>
<tr><td>16</td><td>In the End Time field, enter the time the shift ends and press Tab.</td><td></td></tr>
</table>

Steps		
17	(Optional) In the **Repeat for (D)** field, enter the number of consecutive days you want the transfer to last.	
18	Click **OK** and then click **Save**.	

Scheduling Non-Worked Hours for a Full Day

Purpose

Non-worked hours include sick time and vacation. You should schedule your employees' non-worked time when you know about it in advance.

Accrual balances

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

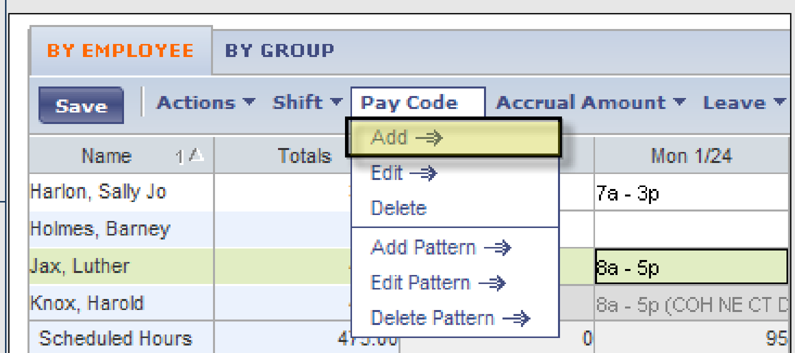
Accruals

Adams, Julie Dates: 5/11/2008 - 5/17/2008

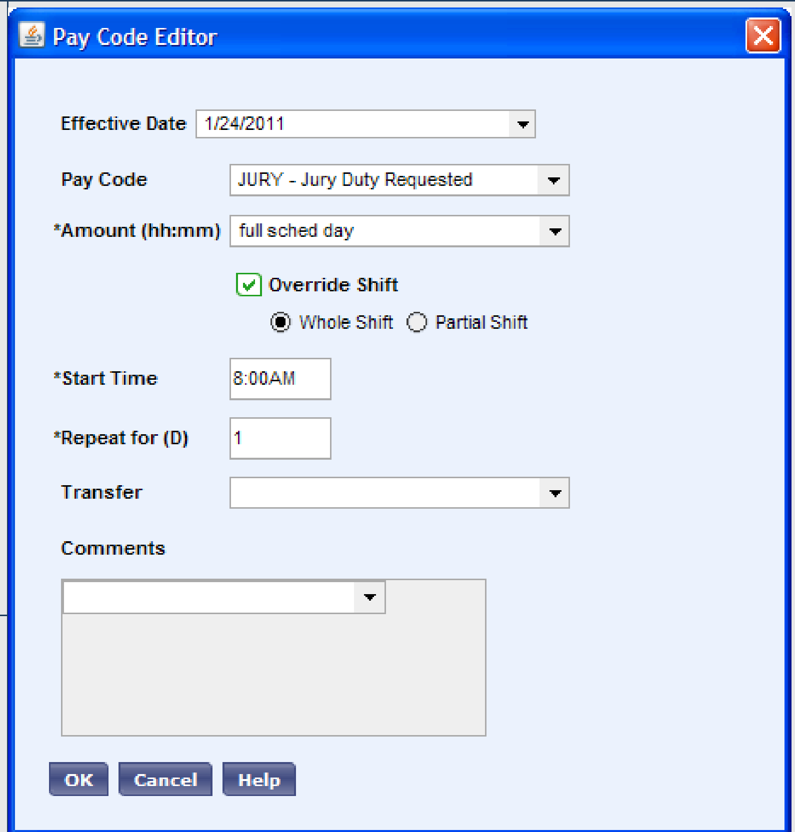
Accrual Code	Balance on Selected Date	Units	Balance Projected Through	Projected Debits	Projected Credits	Projected Balance	Balance without Projected Credits
Sick	80:00	Hour	1/01/2009	4:00	80:00	80:00	76:00
Vacation	160:00	Hour	1/01/2009	4:00	120:00	160:00	156:00

Example

An employee is going to be out on Jury Duty on Monday of the next schedule period. You schedule eight hours of Jury Duty to avoid an unexcused absence.

Steps		
1	**Select Scheduling > Schedule Editor**.	
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 click the cell in that row and under the date where you want to schedule non-worked hours.	
4	Select **Pay Code > Add**.	
5	In the **Effective Date** field, confirm that the correct date is selected.	
6	From the **Pay Code** drop-down list, select the pay code.	

Steps	
7	In the **Amount** field, do one of the following: To schedule a specific number of hours, enter the amount of hours in the box. To schedule the entire number of hours the employee is scheduled to work that day, select **full sched day** from the drop-down list. To schedule half of the number of hours 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: To override the employee's entire shift, select **Whole Shift**. To override part of the employee's scheduled shift, select **Partial Shift**.
9	In the **Start Time** field, confirm the effective time for the non-worked hours.
10	In the **Repeat for (D)** field, enter the number of consecutive days this edit applies.
11	Click **OK** and then click **Save**.



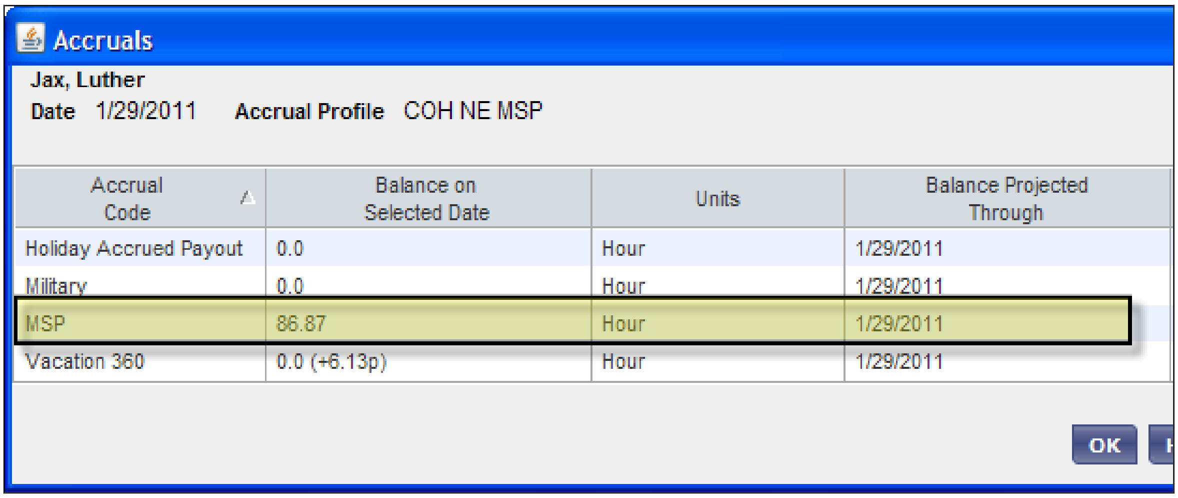
Scheduling Non-Worked Hours for a Partial Day

Purpose

Non-worked hours include sick time and vacation. You should schedule your employees' non-worked time when you know about it in advance.

Accrual balances

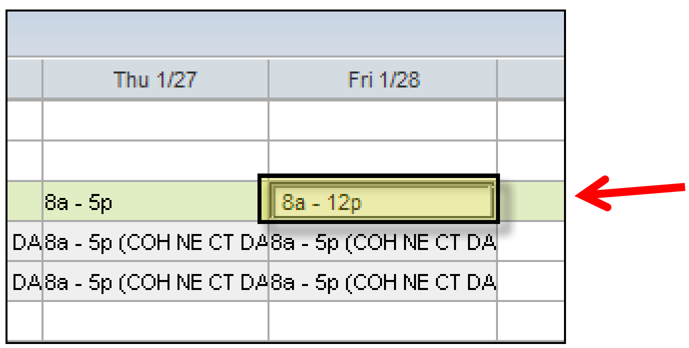
Before you schedule non-worked time, confirm that the employee has accrued enough hours. The Accruals option on the Schedule Editor View menu displays the Accruals Reporting Period data with the employee's current and projected accrued time. The balances are accurate as of the last date in the date range.

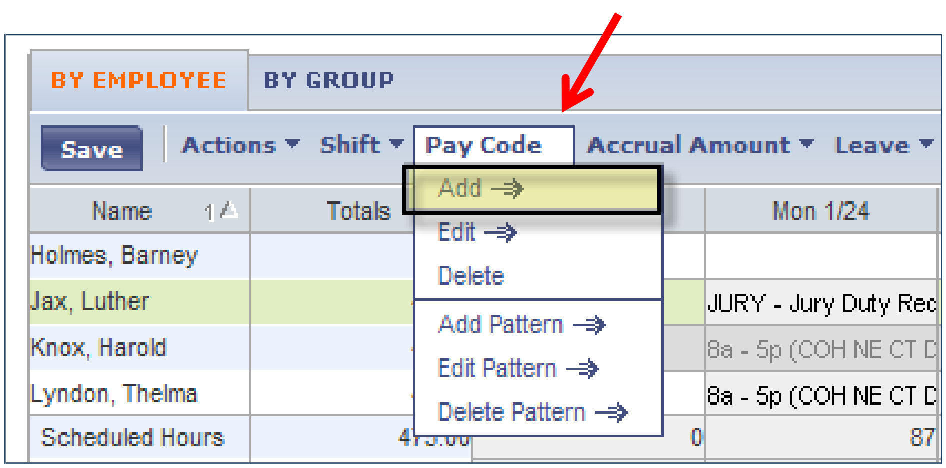


Example

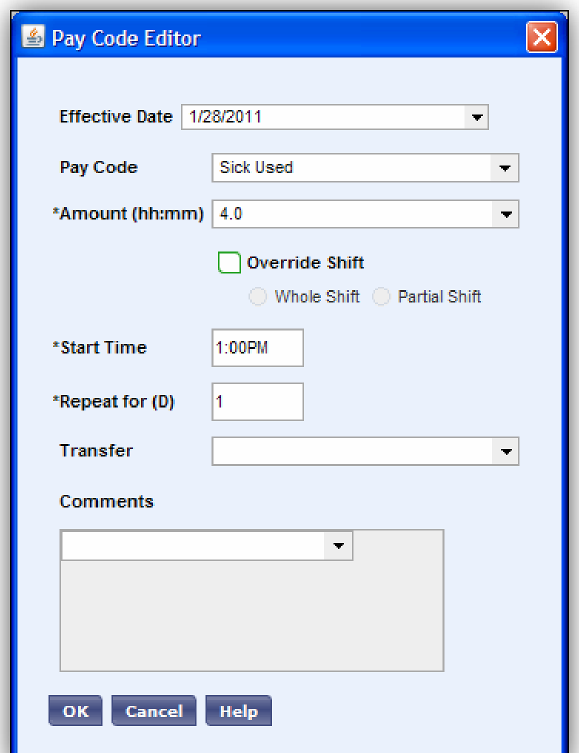
An employee is having a dental procedure Friday afternoon and needs to take half a day sick time. Schedule the employee for four hours of sick time for Friday to avoid an incorrect exception.

Steps	
1	**Select Scheduling >Schedule Editor**.
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 click the cell in that row and under the date where you want to schedule non-worked hours.
4	Change the shift's end time to 12pm.
5	With the relevant shift still selected, select **Pay Code > Add**.





Steps	
6	In the **Effective Date** field, confirm that the correct date is selected.
7	From the **Pay Code** drop-down list, select the pay code.
8	In the **Amount** field, do ***ONE*** of the following: 1. To schedule a specific number of hours, enter the amount of hours in the box. 2. To schedule the entire number of hours the employee is scheduled to work that day, select **full sched day** from the drop-down list. **(DO NOT USE THIS OPTION.)** 3. To schedule half of the number of hours the employee is scheduled to work that day, select **half sched day** from the drop-down list. **(DO NOT USE THIS OPTION.)**
9	(Optional) If the non-worked hours replace an existing shift, select the **Override Shift** check box and do ***ONE*** of the following: 1. To override the entire shift, select **Whole Shift**. 2. To override part of the employee's scheduled shift, select **Partial Shift**.
10	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.
11	In the **Repeat for (D)** field, enter the number of consecutive days. For Example, if the employee has requested five consecutive days of vacation, enter **5**.
12	Click **OK** and then click **Save**.

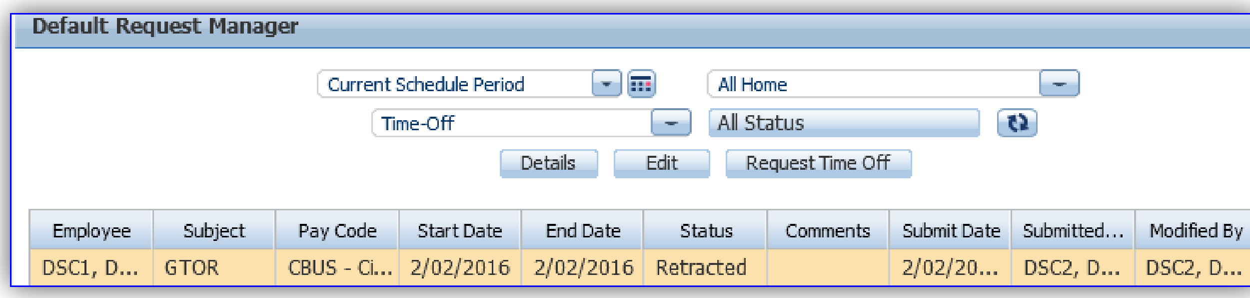


Approving Time-Off Requests – Default Request Manager

Purpose

Employees can submit time-off requests using the ***Request Time Off*** button located in the Employee Workspace. Supervisors can “Approve, This feature provides a consistent, easily accessible way for employees to request or cancel time off, as well as a quick way for timekeepers/supervisors to evaluate and respond to them.

Steps	
1	a) Click and drag the Request Manager widget to the center. 
2	a) Click the Request Manager Alert and select a request type to open the Request Manager widget. b) The number on the alert indicates the number of requests that are pending. c) The Requests list shows the number of requests for each type of request. Use the up and down arrows to move through the list. d) Click a request type in the Requests list. e) The columns and buttons vary by request type. If configured, add-on tabs such as the Detail Panel are below the list.
3	a) You can modify the requests in the grid. Above the columns: a. Select a time period, location, request type, and status *To view detailed information:* ➢ Double-click a request ➢ Select a request, and then click Details or view the information in the Details tab. ➢ Hover the cursor over an item to open a tool tip



Approving Time-Off Requests - Inbox

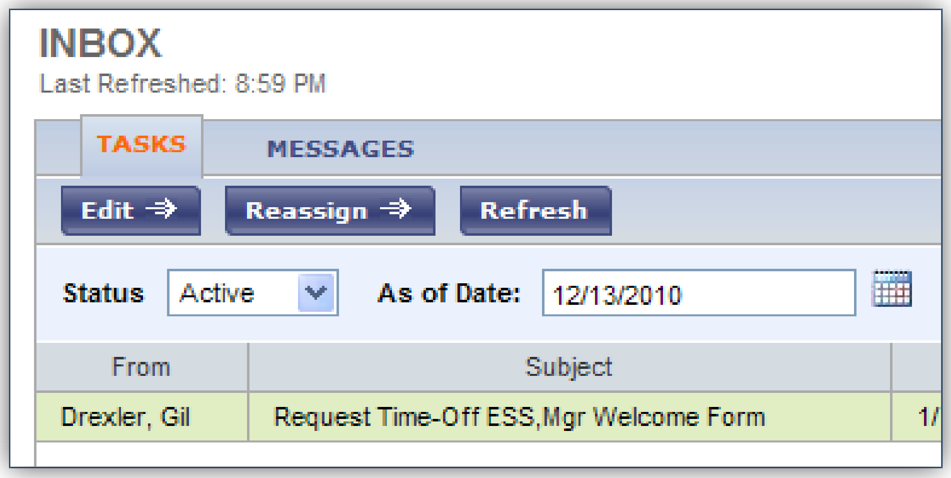
Purpose

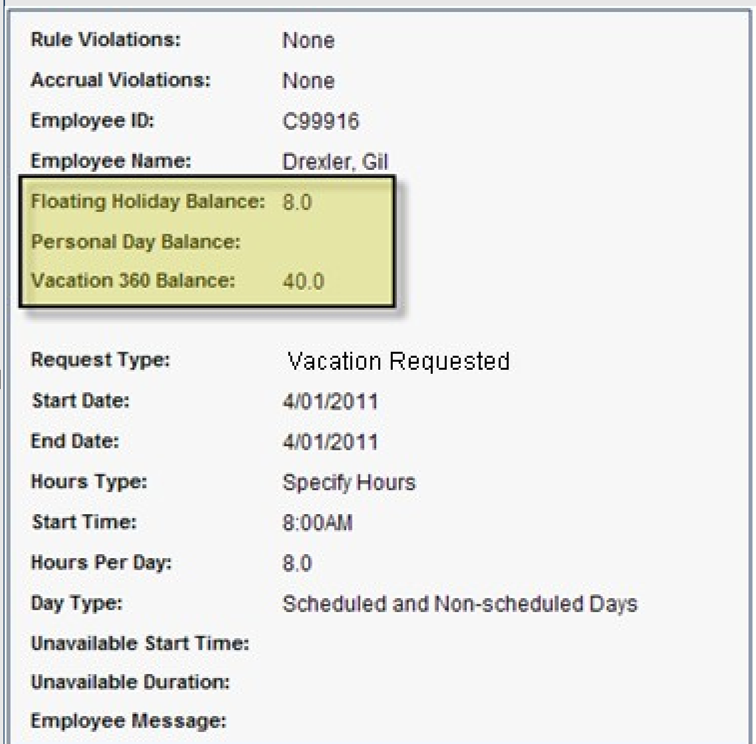
Employees can submit time-off requests using Actions in the application. The application's internal messaging system sends these requests to your Kronos Inbox, where you can evaluate them and approve or reject them. This feature provides a consistent, easily accessible way for employees to request or cancel time off, as well as a quick way for timekeepers/supervisors to evaluate and respond to them.

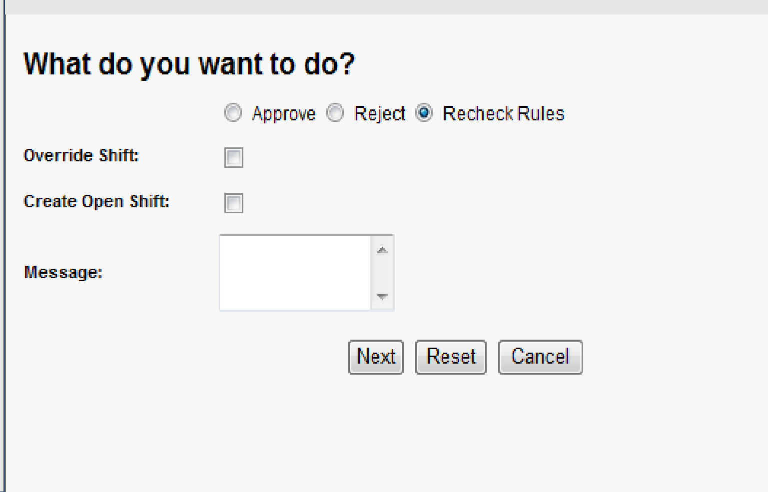
Example

An employee submits a request for eight hours of vacation on a day when she is scheduled to work. You review the Time-Off Request form and determine that she has the time to take, so you approve the request.

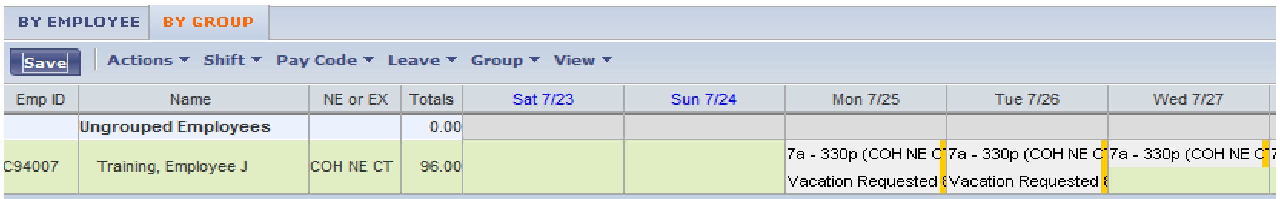
Steps	
1	Select **General >** access the **Inbox**.
2	Click the **Tasks** tab.
3	Select a task and then select **Edit**.
4	In the **Welcome** dialog box, click **Next**.



<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>Confirm that the employee has accrued enough time to take and click Approve.</td><td>
</td></tr>
<tr><td>6</td><td>To replace the currently scheduled shift, select the Override Shift check box.

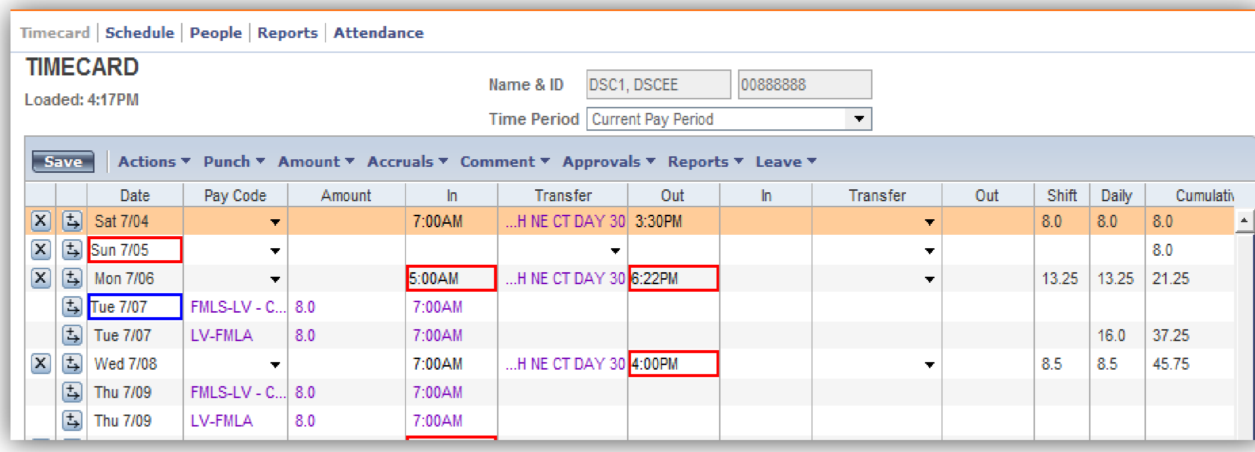
To include a pay code edit for time-off hours in addition to the employee's scheduled shift, clear the Override Shift check box.</td><td rowspan="3">
</td></tr>
<tr><td>7</td><td>(Optional) In the Message box, enter a message about the time-off request.</td></tr>
<tr><td>8</td><td>Click Next.</td></tr>
<tr><td>9</td><td>Click Save & Close.</td><td></td></tr>
</table>

Steps	
10	To confirm that the time off is scheduled, access the **Schedule Editor**. From the **Show** drop-down list, select a set of employees that contains the employee whose time- off request you approved. From the **Time Period** drop-down list, select the time period when the time off will occur.
11	Confirm that the employee's schedule contains a pay code edit in the date cells that correspond to the approved time-off request.



Cascading Pay Codes

Comp Time and/or Holiday Accrual will be exhausted first if an employee request Vacation or Personal time off as demonstrated below. Any sick time requested will default to any MSP prior to using CSL.



Reviewing and Editing Time and Attendance Data

Reviewing Employee Data Using a Genie

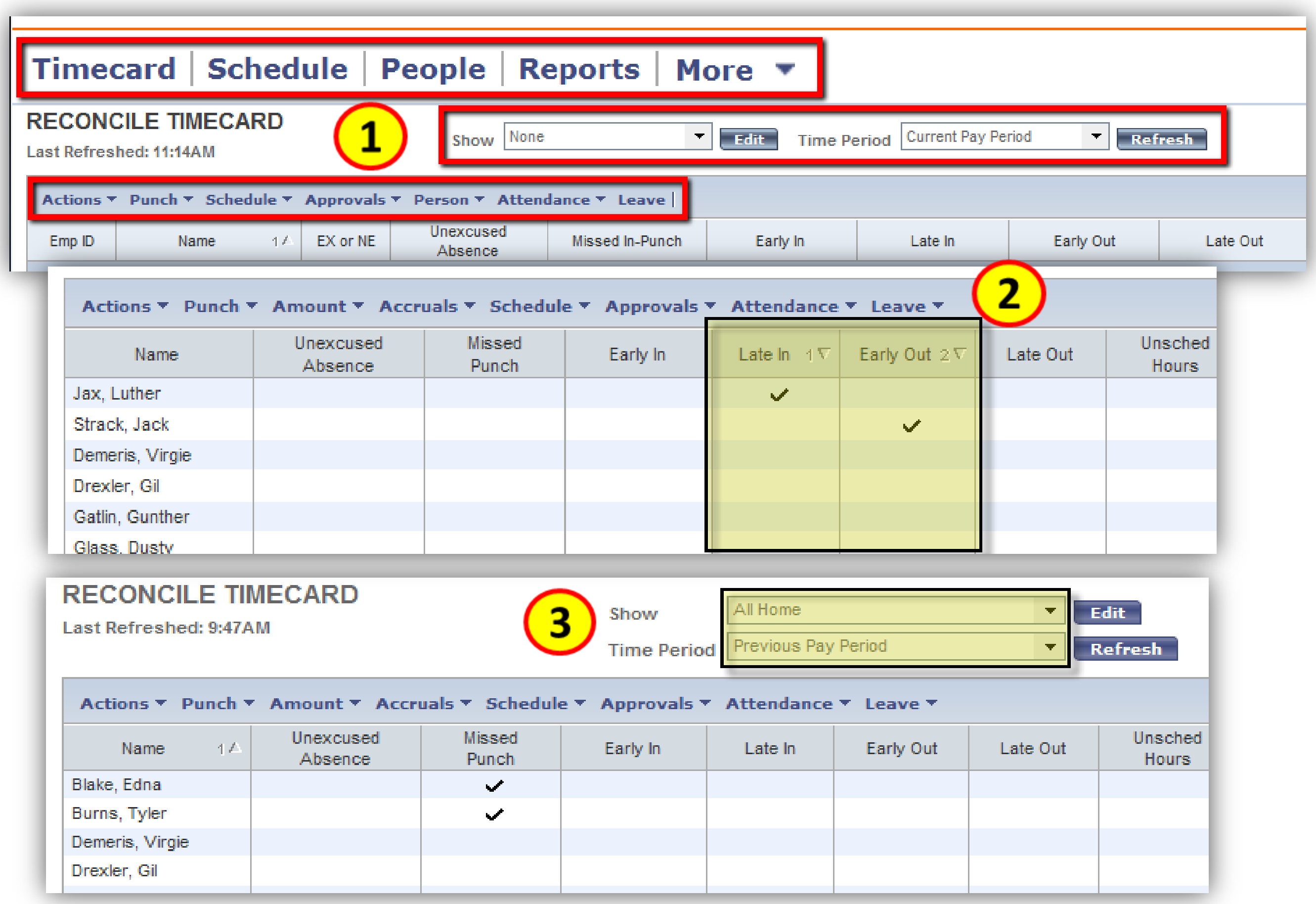
Purpose

Kronos 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 unexcused absences in the previous pay period. Use the Reconcile Timecard Genie to perform this task.

Steps	
1	Select **Timekeeping > Reconcile Timecard** Genie.
2	Select the specific set of employees from the **Show** drop-down list.
3	Select the specific time period from the **Time Period** drop-down list.
4	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.
5	Review the information in the Reconcile Timecard Genie.



Exporting Genie Data

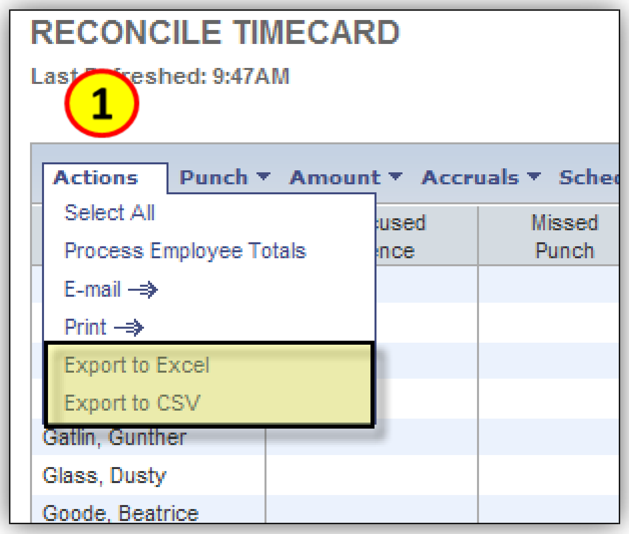
Purpose

Kronos 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 business needs. For Example, you can save labor information in the Reconcile Timecard Genie with an Excel file extension and then open it with Microsoft Excel to summarize the data in each column. You can also export the data to a CSV (Comma Separated Value) file to make it available to other applications such as Lotus 1-2-3.

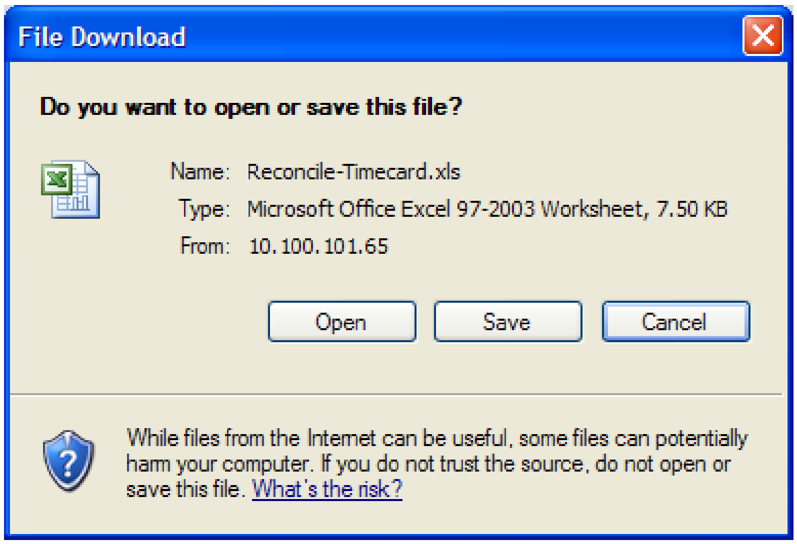
Example

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

Step	
1	Access a Genie, such as the Reconcile Timecard Genie.
2	Select **Actions > Export**.
3	Choose the export option: **Excel or CSV**.



Step	
4	In the File Download dialog box, click **Open** to review the Genie data.
5	(Optional) Click **Save**. In the **Save As** dialog box, select a location for the file and click **Save**. You can review the data by opening the file from its new location.



Generating Reports

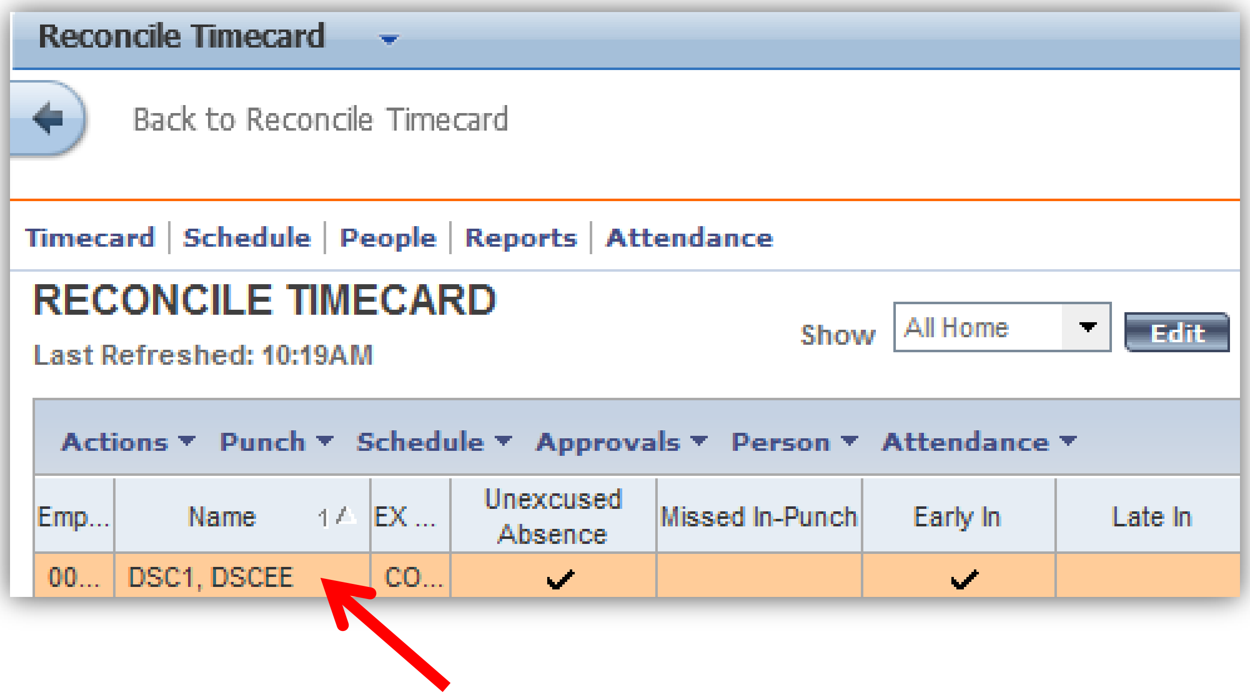
Purpose

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

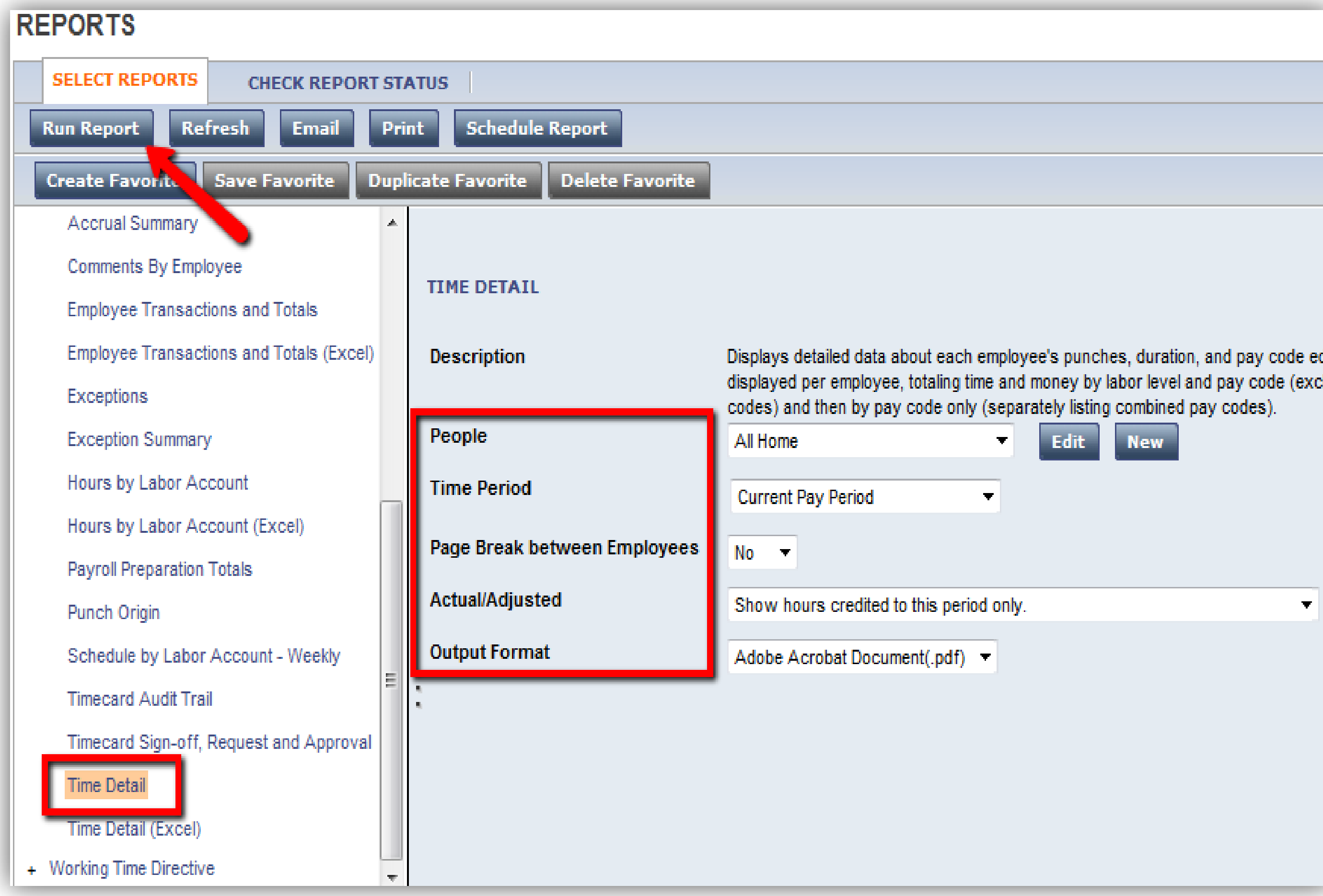
Example

For auditing and validation Purposes, you want to review all timecard data for employees for the previous pay period. Generate a **Time Detail report** to review tis information.

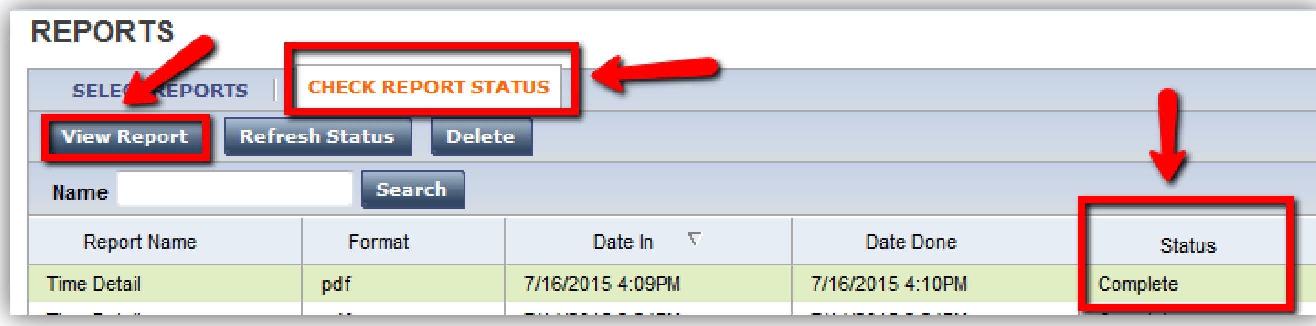
Steps	
1	To specify one or more employees, access a Genie. Select the employees to include in the report. Then go to step 2. To select all employees, select **General > Reports**. Then go to step 3.
2	Click the **Reports** quick link.



Steps	
3	On the **Select Report** tab, click the plus **(+)** to display a category's contents. Click a report name and review its description to ensure that the report returns the data you need.
4	If you selected employees in a Genie, verify that **Previously Selected Employee(s)** appears in the **Show** field. Or, select a different set of employees from the **Show** drop-down list.
5	Select the specific time period from the **Time Period** drop-down list.



Steps	
6	1. To generate a report, click **Run Report**. 2. To generate a report and automatically e-mail it to recipients, click **E-mail**. Fill in the **Recipients** field in the E- mail dialog box and click **OK**. Then click the **Check Run Status** tab.
7	Review information in the **Status** column. Click **Refresh Status** several times until **Complete** or **Failed** appears in the **Status** column.
8	1. To view a report, click a report name to highlight it and do any of the following: 2. To use menu options, click **View Report**. 3. To use mouse options, double-click the report name. 4. To print the report to a local printer, select **File > Print** and then select a printer from the list. 5. To send a report in an e-mail message, select **File > Send > Page by E-mail** and complete the e-mail message contained in your default e-mail client.



The following is an Example of a Time Detail report:

Time Detail

Time Period:	Current Pay Period	Data Up to Date:	1/31/2011 6:15:03 PM
Query:	Previously Selected Employee(s)	Executed on:	1/31/2011 6:14:48 PM
Actual/Adjusted:	Show hours credited to this period only.	Printed for:	C99901
		Insert Page Break After Each Employee:	No

Employee:	Blake, Edna	**ID:**	C99912	**Time Zone:**	Central
Status:	Active	**Status Date:**	1/7/2011	**Pay Rule:**	COH NE CT
Primary Account		**Start**	**End**		
6500070002/10000311/099/30034528/-/X810/20000568		1/7/2011	Forever		

Date/Time *Xfr/Move: Account*	Apply To	In Punch *Comment*	In Exc	Out Punch	Out Exc *Xfr: Work Rule*	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
1/10/2011		8:00:00 AM								0.00	0.00
					MO						
1/11/2011		8:00:00 AM		5:00:00 PM						8.00	8.00
1/12/2011		8:00:00 AM		5:00:00 PM						8.00	16.00
1/13/2011		8:00:00 AM		5:00:00 PM						8.00	24.00
1/14/2011		8:00:00 AM		5:00:00 PM						8.00	32.00
1/17/2011		8:00:00 AM		5:00:00 PM						8.00	40.00
1/18/2011		8:00:00 AM		5:00:00 PM						8.00	48.00
1/19/2011		8:00:00 AM		5:00:00 PM						8.00	56.00
1/20/2011		8:00:00 AM		5:00:00 PM						8.00	64.00
1/21/2011		8:00:00 AM		5:00:00 PM						8.00	72.00

Labor Account Summary	Pay Code	Hours	Money	Days
6500070002/10000311/099/30034528/-/X810/20000568				
	BASE - Base Pay	64.00		
	FMLA Qualifying Hours - c	88.00		
	HACC - HOL Accrued	8.00		
	HOLP - Holiday Credit Paid	8.00		
	HWKP - HOL Wkd Hours Paid	8.00		
	MSP Qualifying Hours - c	88.00		

Accessing Employees' Timecards

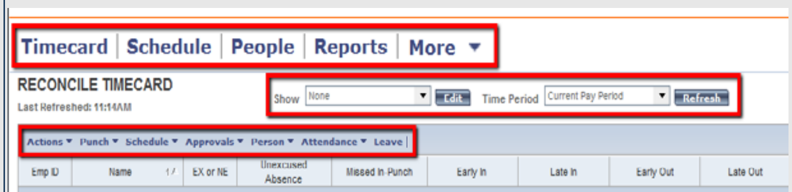
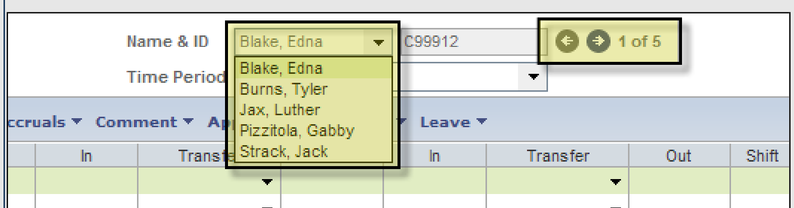
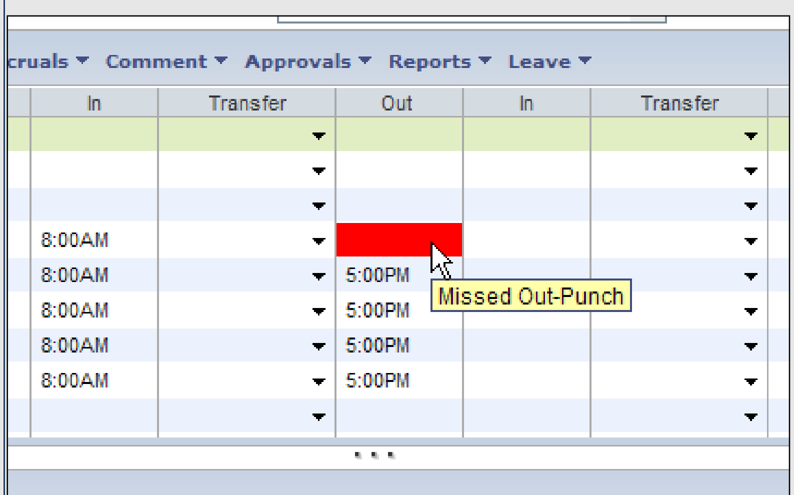
Purpose

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 will open the timecards of each of these employees to review and adjust the data.

Steps		
1	Access a Genie, **Timekeeping > Reconcile Timecard** Genie.	
2	Select the specific set of employees from the **Show** drop- down list. Select the correct time period from the **Time Period** drop- down list.	

Steps		
3	Click the name of employee(s) whose timecards you want to review.	
4	Click the **Timecard** quick link.	
5	If you selected more than one employee, do one of the following: Click the **Next** scroll button to move to the next employee. You can use the **Previous** scroll button to move to a previous employee. Select an employee from the **Name & ID** drop-down list.	
6	Place your mouse over the exception to display its description in a pop-up message.	

Tip

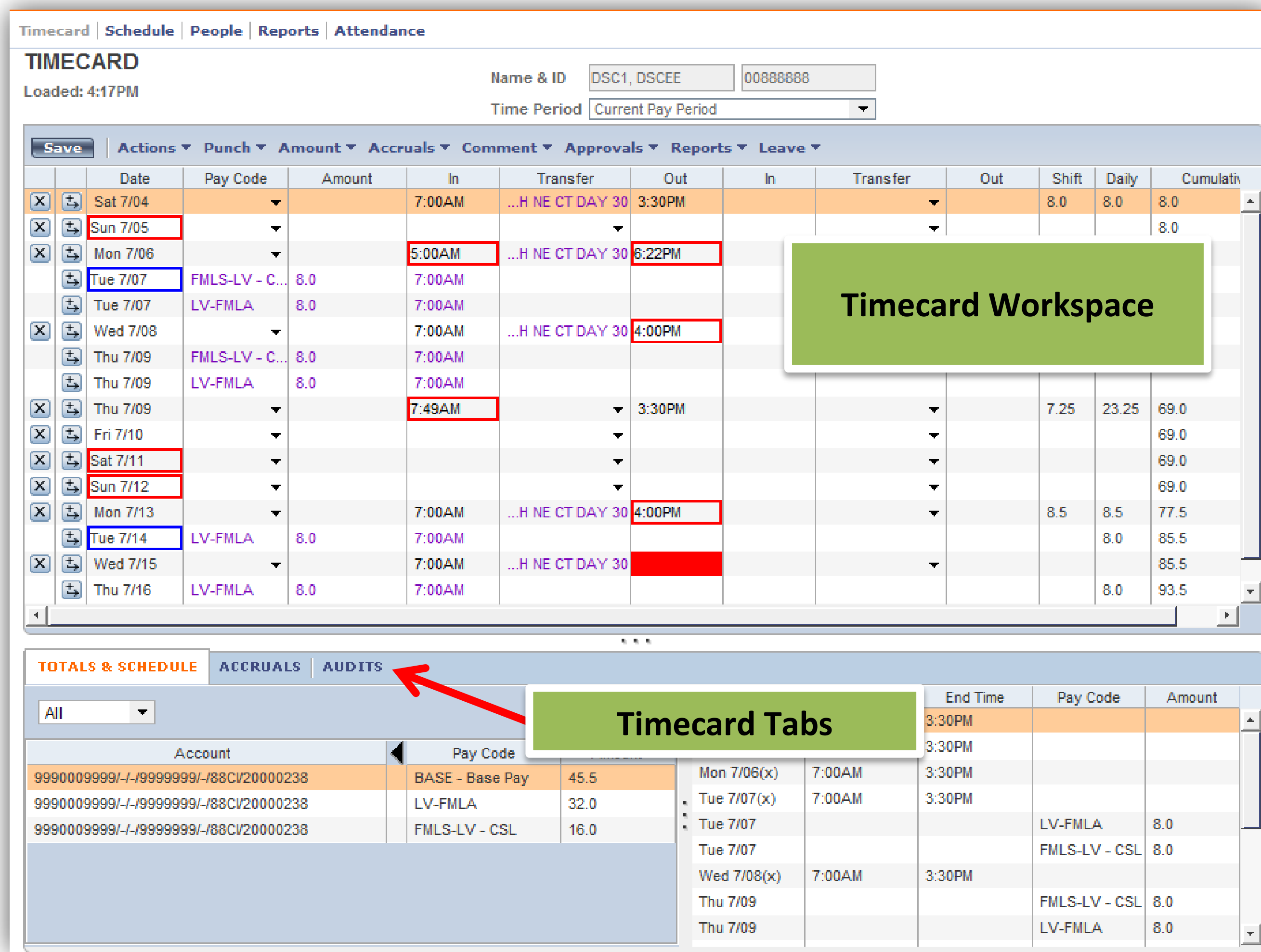
There are various ways to select multiple employees before using a quick link:

- To select multiple employees listed adjacent to each other
  - Click the first name, then hold down the **Shift** key and click the last name, or
  - Click one employee and drag the mouse up or down to select other employees
- To select multiple employees that are not listed adjacent to each other, click one name, then hold down the **Ctrl** key and click additional employee names

Hourly Timecard Overview

There are 2 main areas on a Timecard:

1. Timecard Workspace
2. Timecard Tabs

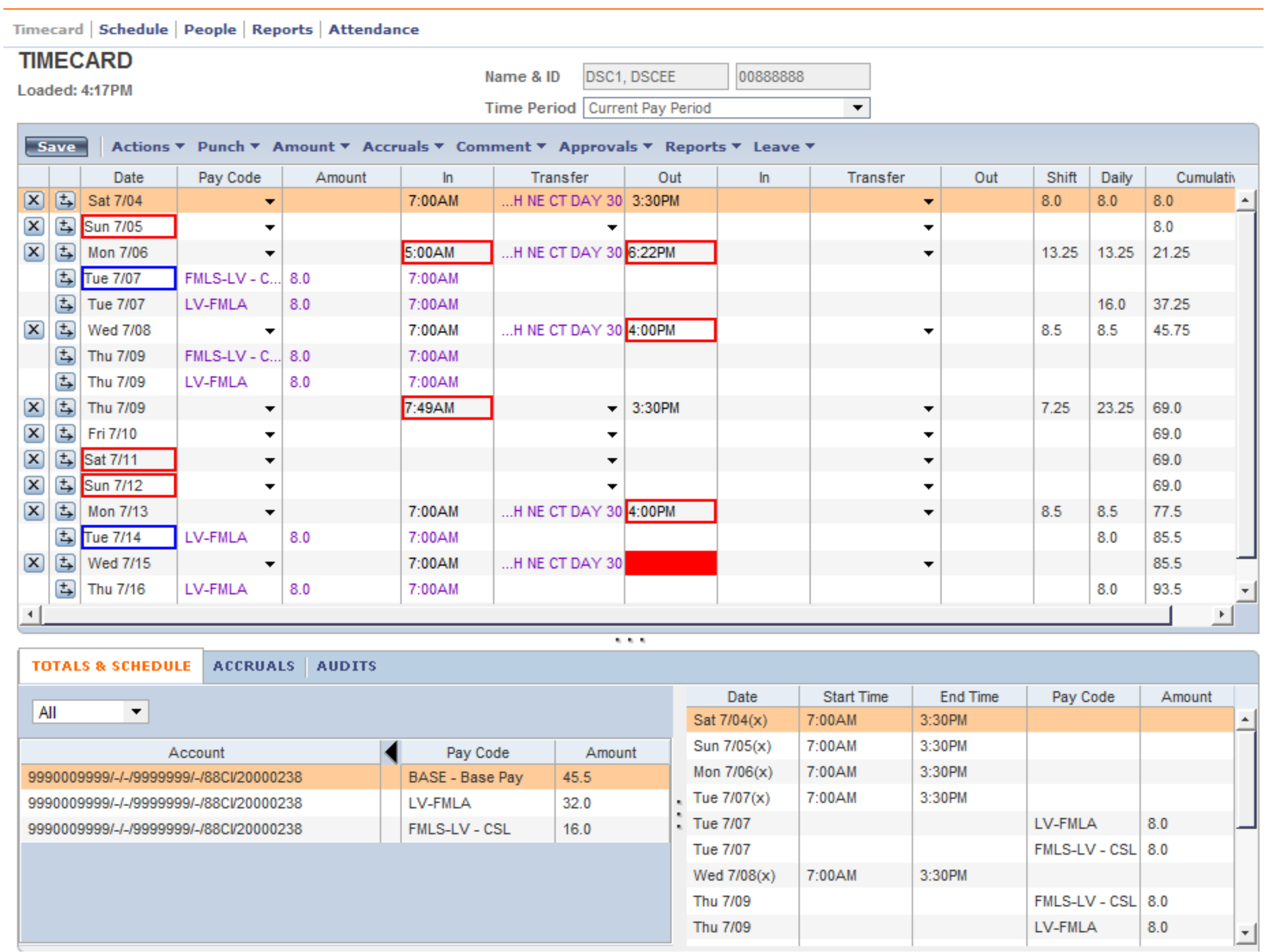


Timecard Area	Description
Timecard workspace	Located in the middle of the page beneath the page header, the timecard workspace displays the following information: ➢ Menu bar that contains selections for performing timekeeping tasks ➢ Grid containing dates for the selected time period ➢ Time entry totals, including shift, daily, and cumulative amounts ➢ **Shift Total –** Calculated total hours of all shifts worked on the selected day (excluding totals for non-shift items such as pay codes). ➢ **Daily Total** – Calculated total hours of the selected day, including pay codes. ➢ **Cumulative** – Cumulative total up to and including the selected day. ➢ **All** – Calculated total hours for the entire visible time period.
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: ➢ **Totals & Schedules –** 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. ➢ **Accruals –** Displays accrual codes and available balances based on the date selected in the timecard workspace. ➢ **Audits –** Lists all time punch or amount corrections made to an employee's timecard and approvals made by timekeepers/supervisors. ➢ **Note:** 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

Visual indictors 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.

Visual indicator	Description
Blue bordered date	An excused absence for the day, such as Vacation, Bereavement, or Jury Duty
Red bordered date	An unexcused absence for the day
Red bordered punch	An exception, such as a late or early punch, or a short or long break
Green bordered punch	Exception has been marked as reviewed
Solid red cell	A missed punch
Purple text	A transaction that was added by the Kronos application
Yellow note icon in the top corner of a cell	One or more comments are attached to the punch or amount.



Adding Missed Punches

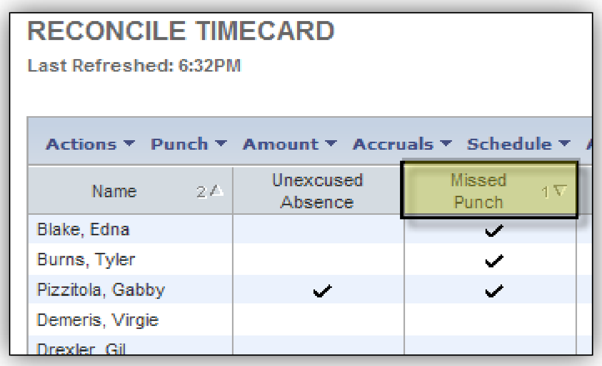
Purpose

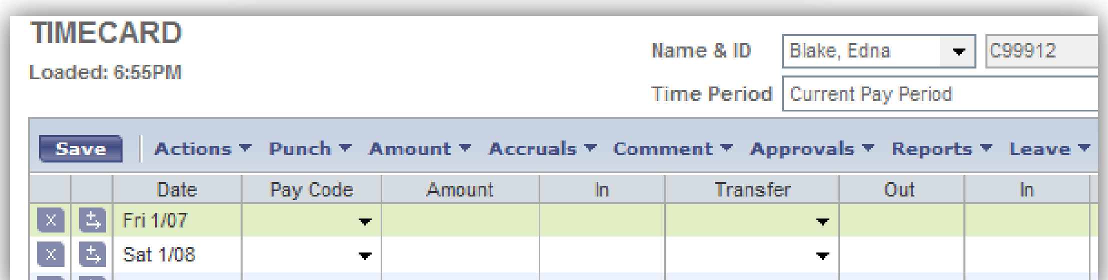
An employee might forget to punch in or out. When this happens, a solid red box appears in the missed In or Out cell. To add that punch, you click the cell and type the missed time. The application accepts multiple formats for entering punches in a timecard.

Example

An employee notified you that she forgot to punch out on Monday. The employee started her shift at 8:00 A.M. and ended her shift at 5:07 P.M. From the Reconcile Timecard Genie, access the employee's timecard and add the 5:07 P.M. out punch on the employee's timecard for Monday.

Steps	
1	Select **Timekeeping > 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 **Missed Punch** column in descending order.
4	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**.





Indicator	Description
	Solid red in a cell indicates a missed in- or out-punch. Mouse over the red for more information.
5:11PM	A red border around a cell indicates an exception, such as a late punch. Mouse over the cell for more information.
Tue 1/29	A blue border around a date field indicates an excused absence.
Sun 3/18	A red border around a date field indicates an unexcused absence.
3/14	A salmon border around a date field indicates that an employee has justified an absence. A salmon border around a cell indicates that an employee has justified an exception.
10:13 AM	A green border around a cell indicates missing time that a manager has justified or marked as reviewed.
Thu 3/18	A green border around a date indicates an absence that a manager has justified or marked as reviewed.
2:59PM	A small orange and yellow note icon indicates a comment about the cell's contents. Click the cell, then the Comments tab to view the comment.
8:30	A transaction shown in purple on a white background indicates that the system added a transaction, and that you can edit it.
1:00	A transaction shown in purple on a gray background indicates that the system added a transaction, such as a holiday, and that you cannot edit it.
Account (x)103/201/305/404/... (x)103/201/305/404/...	An (x) before a labor account in the Totals section indicates that the account is not the primary labor account.
Date Sun 4/15 Mon 4/16(x) Tue 4/17	An (x) after a date in the Schedule section indicates that there is a scheduled transfer in that shift.
Total 1:00 1:00	Gray cells are unavailable for edits. **Note:** The calculated totals section of the timecard is always gray.
Date / In / Out Sun 2/03(o) 7:00AM 7:00AM Mon 2/04(o) 7:00AM 7:00AM Tue 2/05(o) 7:00AM 7:00AM	An (o) after a date in the Schedule section indicates a scheduled off-day with an associated work rule.
Uneditable gray row with pay code and amount data	A historical edit appears in a signed-off timecard with the pay code and amount in an uneditable gray row. If you mouse over the gray row, a message reads: historical amount.
Orange text	Orange page title text and an asterisk indicate that data has been modified.
Purple text	When the Pay Code column contains purple text, it indicates that the time worked for a designated date pattern was less than the contracted time. The Amount column contains the amount of the shortfall, which also appears in purple.

Refreshing and Saving Data in Timecards

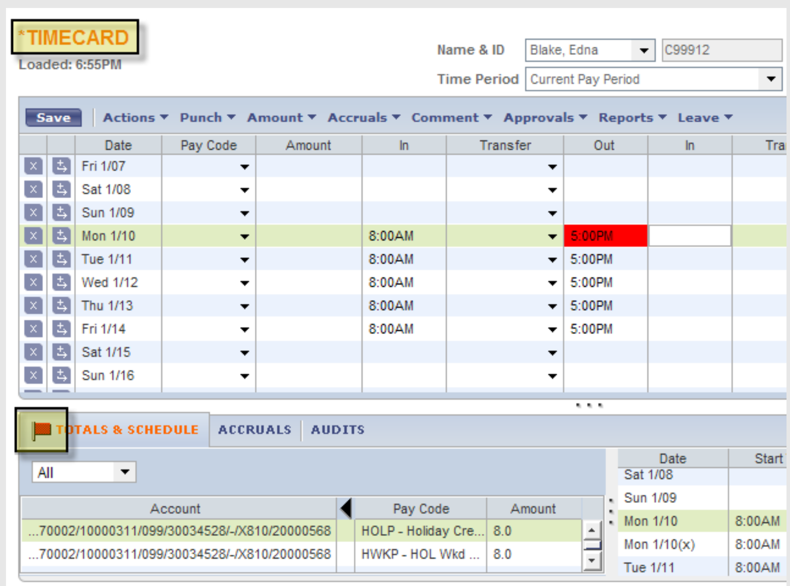
Purpose

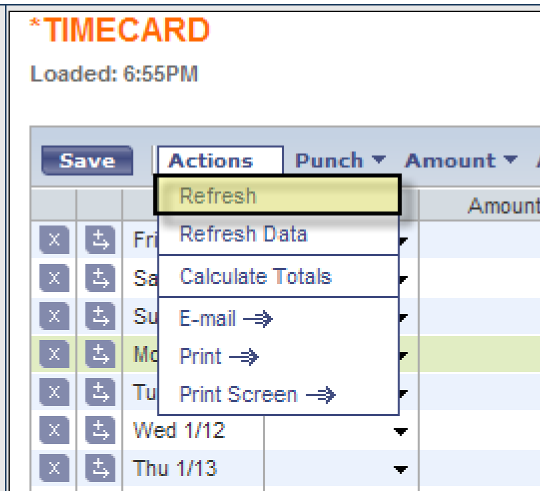
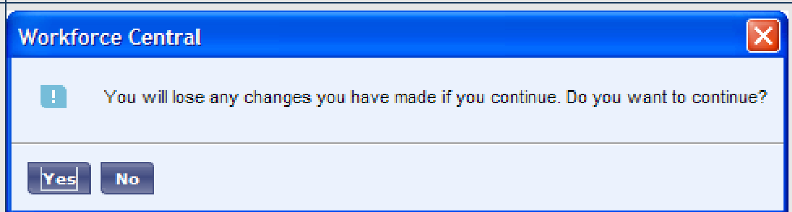
When you add and modify timecard data, the application displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can decide whether the edits are what you want.

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, edit the correct information and save it.

Canceling edits

Steps		
	Perform one or more edits on a timecard. Notice the visual indicators that indicate unsaved data.	

2	Select **Actions > Refresh**.	
3	Do you want to cancel your changes? To cancel your changes, click **Yes**. To keep your changes, click **No**.	

Saving edits

	Steps
1	Perform one or more edits on a timecard. Notice the visual indicators That indicate 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.

Visual indicator	Description
Timecard title in orange with asterisk	Unsaved edits
Red flag in the Totals & Schedule tab	Totals are not up-to-date

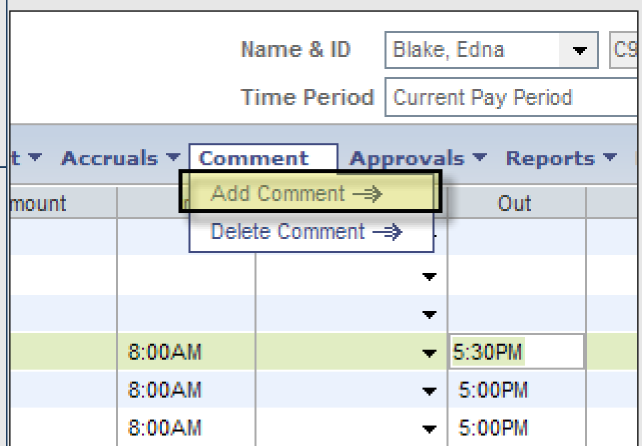
Attaching Comments to Punches

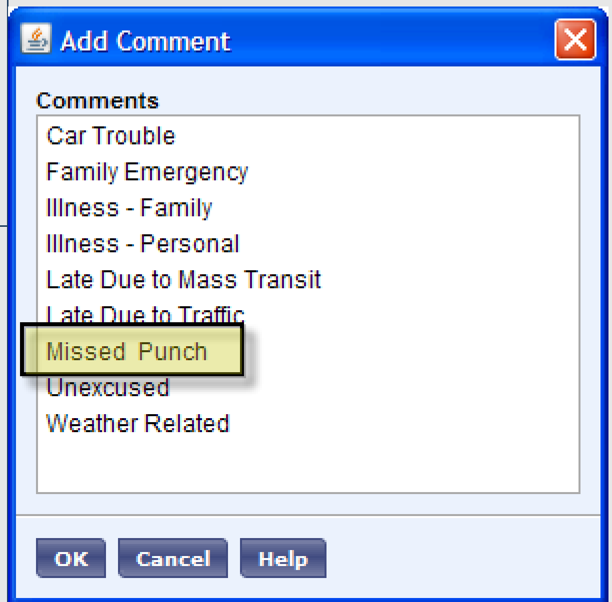
Purpose

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

After canceling an edit that had involved an incorrect time when adding an employee's missing out punch, you now enter the correct out punch time and add a comment to the punch.

Steps		
1	In the timecard, click the cell that contains the punch to which you want to add a comment.	
2	Select **Comment > Add Comment**. **Note:** You can also right click in the cell and select **Add Comment** from the shortcut menu.	

Steps		
3	Select one or more comments from the list. **Tip:** Hold the **Ctrl** key to select more than one comment.	
4	Click **OK**.	
5	Click **Save**.	

Business practice

It is a best practice to include comments when applying edits to an employee's timecard.

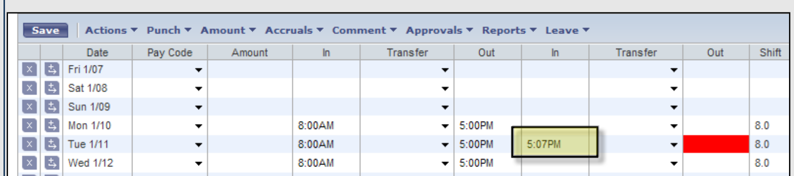
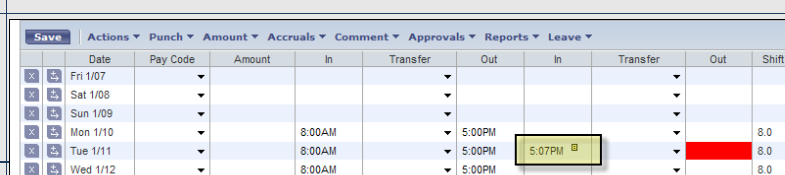
Deleting Duplicate Punches with a Comment

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 punches that you delete.

Example

An employee could not remember if he punched out at the end of his shift. So he punched out a second time to ensure that he recorded his end-of-shift time. While reviewing the employee's timecard, you notice that two out punches appear for the employee's end of shift. You want to delete the employee's second out punch, but first you need to add a comment to that punch. The comment will appear in the audit trail. From the Reconcile Timecard Genie, access the employee's timecard, then add a comment to and delete the duplicate out punch.

Steps		
1	In the timecard, click the cell that contains the punch you want to delete.	
2	Select **Comment > Add Comment**. **Note:** You can also right click in the cell and select **Add Comment** from the shortcut menu.	
3	Select one or more comments from the list. **Tip:** Hold the **Ctrl** key to select more than one comment.	
4	Click **OK**.	
5	Confirm that the comment was added.	
6	Press the **Delete** key on the keyboard.	
7	Click **Save**.	

Adding Pay Code Amounts to Timecards

Purpose

Pay codes keep track of the type of worked and non-worked time that is entered in the timecard. Examples of pay codes include: Holiday, Overtime, Sick, Vacation.

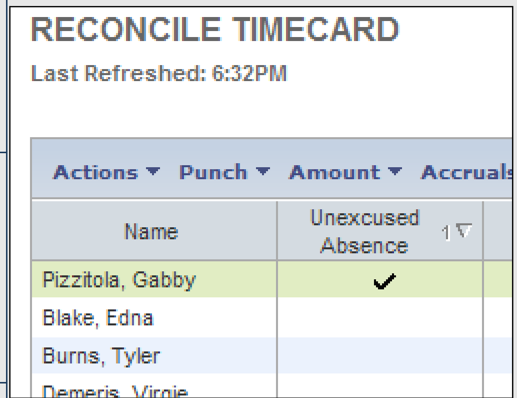
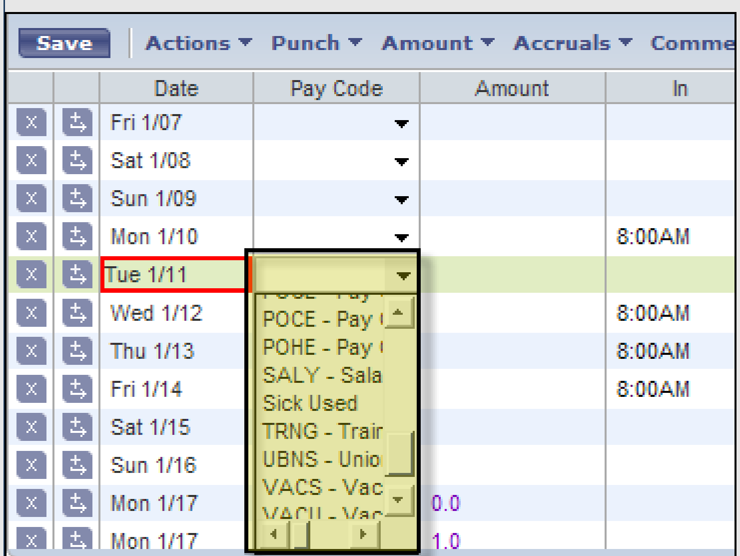
It is important that hours are tracked to the correct pay code so that the employee is paid correctly. There are times when you might have to edit an employee's timecard and use a pay code to track his or her worked or non-worked time; for Example, when the employee calls in sick.

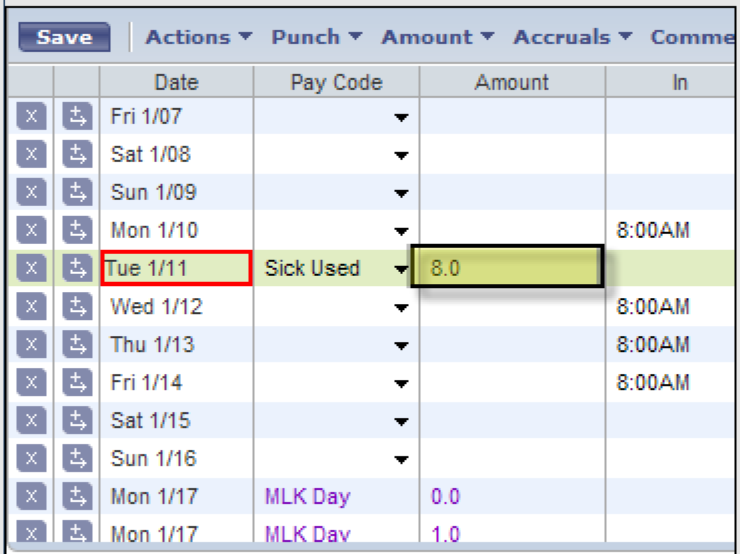
Acceptable formats for entering pay code amounts

Acceptable format	Example	Interpretation by Kronos
Leading zeros (optional)	07	7:00 hours
	08:30	8:30 hours
Colon	7:30	7:30 hours **Note:** If you enter an amount without a colon Kronos interprets your entry as is, which may be a much larger amount than you meant. For Example, if you enter 730 (without the colon), Kronos interprets that as 730 hours.
Decimal	8.5	8:30 hours
Full Schedule Day/ Half Schedule Day	full schedule day/ half schedule day in the Amount field	Employees receive hours based on their schedule assignments for that day

Example

An employee called in sick on Tuesday. His timecard was not updated to reflect this. From the Reconcile Timecard Genie, access the employee's timecard. Add eight hours of sick time to his timecard.

Steps		
1	Select **Timekeeping >** 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 click the **Timecard** quick link.	
5	Identify the day with the unexcused absence. Does the day already have punches? 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. Yes - On the row of the date where you want to enter pay code amount, click the **Insert Row** icon. On the new row, select the pay code from the **Pay Code** drop- down list.	

<table>
<tr><th colspan="3">Steps</th></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, or select one of the scheduling amount options.</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.

Paying Employees for Meals

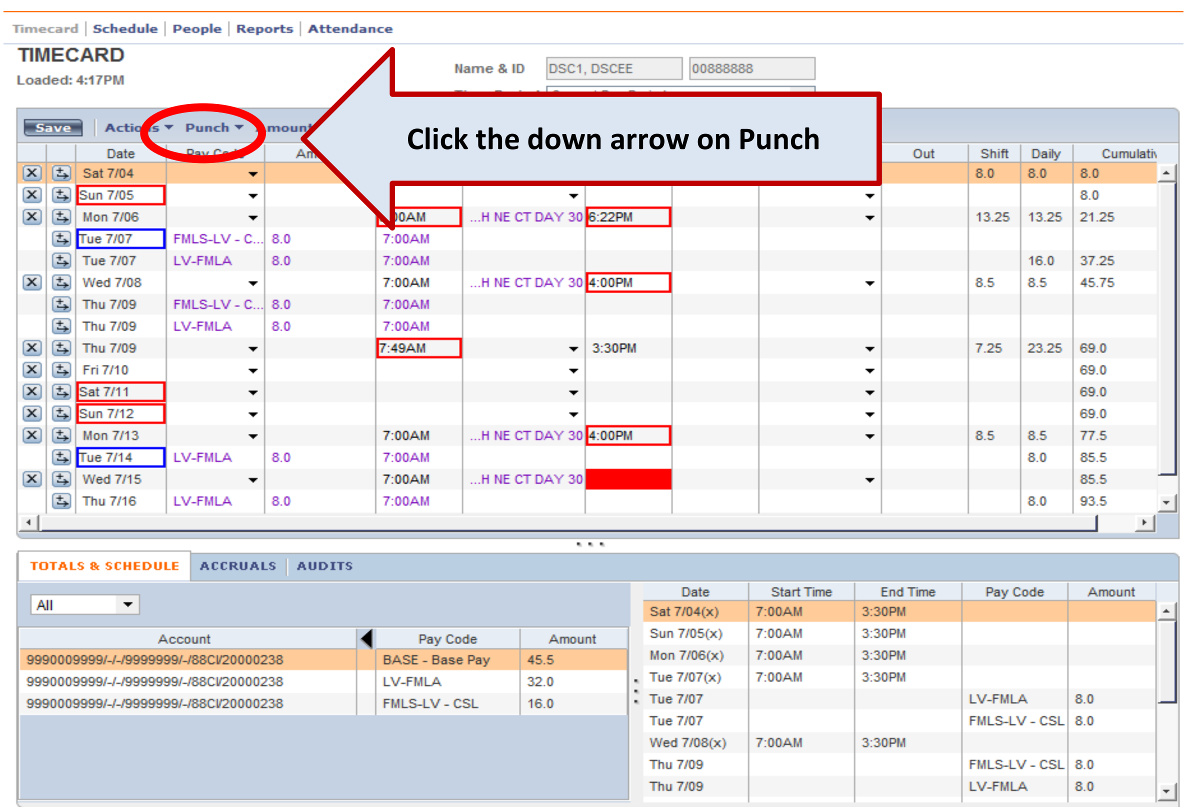
Purpose

Work rules define basic time and labor conditions, such as how breaks and meal deductions occur during shifts. For Example, a work rule might stipulate that an employee must work a minimum of five 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, so you will need to cancel the automatic meal deduction to add the time worked to the timecard.

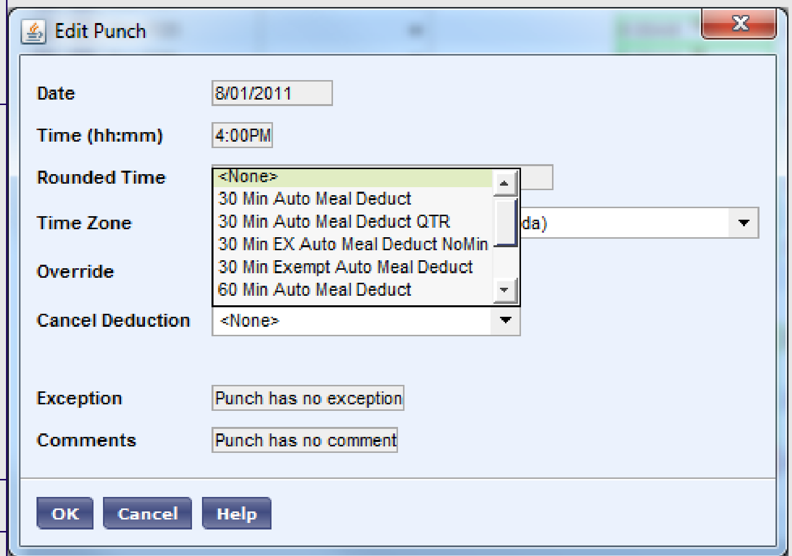
Example

An employee worked through her lunch break on Friday due to a heavy workload. From the Reconcile Timecard Genie, access the employee's timecard and cancel her meal deduction for Friday.

Steps	
1	Access the **QuickFind Genie.**
2	Enter search information in the **Name or ID** field to locate the employee and select the time period from the **Time Period** drop- down list.
3	Select the employee and click the **Timecard** quick link.
4	Click the **Out** punch cell on the date you want to cancel the deduction.



Steps		
5	Right Click - Select **Edit Punch**	
6	Select the deduction you want to cancel from the **Cancel Deduction** drop-down list. **(Be sure to select the appropriate minute deduction that ends with "QTR")**	
7	Click **OK**.	
8	Click **Save**.	



Caution

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.

Note

A majority of employees will punch in and out at a clock for meal breaks. A limited number of employees will not have access to a clock and therefore their meals will be automatically deducted.

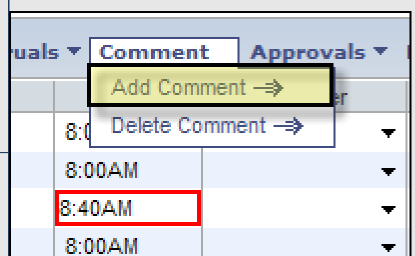
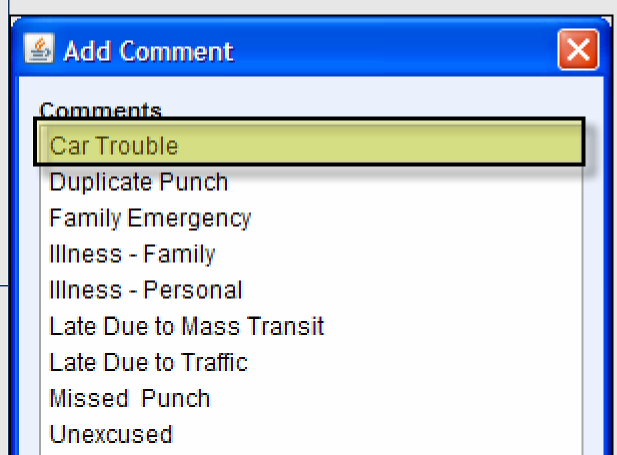
Marking/Unmarking Exceptions as Reviewed

Purpose

Once you have reviewed an exception and resolved it to your satisfaction, you can mark the exception as having already been reviewed. The exception will remain visible in the timecard and in Genies, but will no longer appear in exception reports or queries. Once the exception is marked as reviewed, a green border will appear in the cell containing the exception. Additionally, at any time you can choose to unmark an exception as reviewed.

Example

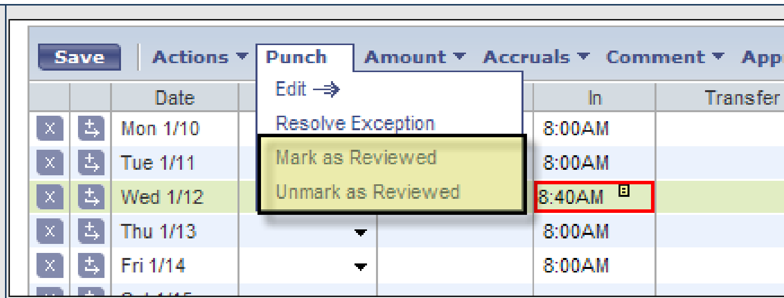
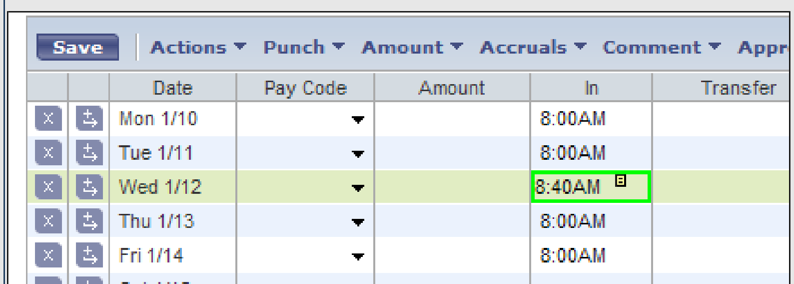
On Wednesday an employee arrived late to work because he had car problems. You add a comment to the employee’s late in punch as a reminder of why the employee did not work his entire shift. Then you mark the exception as reviewed so that you do not re-check it again at a later date.

Steps		
1	In the timecard, select the cell containing the exception.	
2	Select **Comment > Add Comment**. **Note:** You can also right click in the cell and select **Add Comment** from the shortcut menu.	
3	Select one or more comments from the list. **Tip**: Hold the **Ctrl** key to select more than one comment.	
4	Click **OK**.	
5	Click **Save**.	

<table>
<tr>
<td>6</td>
<td>Do you want to mark an exception as reviewed, or unmark an exception as reviewed?

To mark an exception as reviewed, select Punch > Mark as Reviewed.

To unmark an exception as reviewed, select Punch > Unmark as Reviewed.

Note: You can also right click in the cell and select these options from the shortcut menu.</td>
<td>
</td>
</tr>
<tr>
<td>7</td>
<td>Review the results.</td>
<td>
</td>
</tr>
</table>

Transferring Hours for Entire Shifts

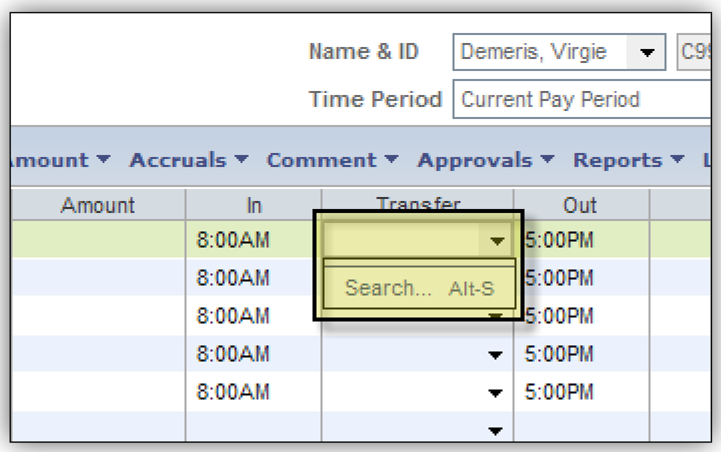
Purpose

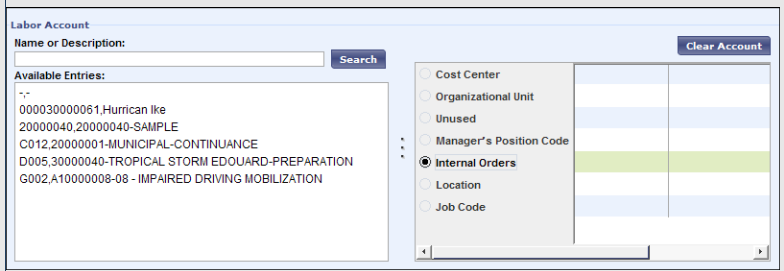
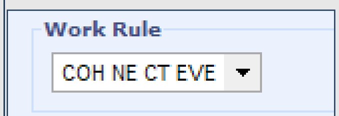
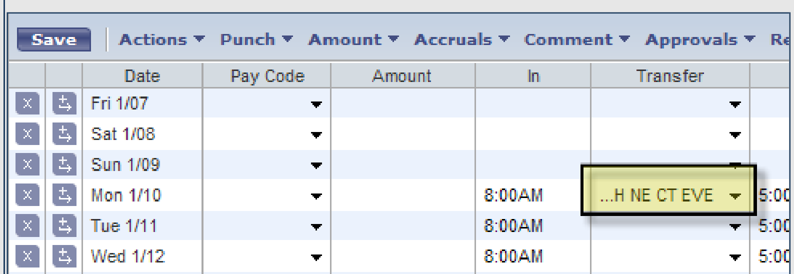
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule. You need to record the transfer in the application so that the right labor account is charged and the right work rule is applied. You or the employee can record the transfer at a terminal or directly in the schedule or timecard.

Example

On Monday an employee worked eight hours in a specific DAC, which is not her primary assignment. Access the employee's timecard and transfer the eight hours of worked time for Monday of the previous pay period to the applicable DAC.

Steps	
1	Select **Timekeeping > 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** quick link.
4	Click the drop-down arrow in the **Transfer** cell between the **In** and **Out** punch cells for the date you want to record the transfer.
5	***Does the labor account or work rule appear in the Transfer list?*** **Yes** - Select the labor account or work rule and continue to step 8. **No** - Select **Search** and continue to the next step.



Steps		
6	What kind of transfer(s) do you want to perform using the **Select Transfer** dialog box? To transfer hours to another labor account, click a labor level option and select the labor level from the **Available Entries** list.	
	To transfer hours to another work rule, select the work rule from the **Work Rule** drop- down list.	
7	Click **OK**.	
8	Click **Save**.	

Business practice

Work rule transfers should always be scheduled. If the transfer is related to a grant, use the internal order labor level.

Transferring Hours for Parts of Shifts

Purpose

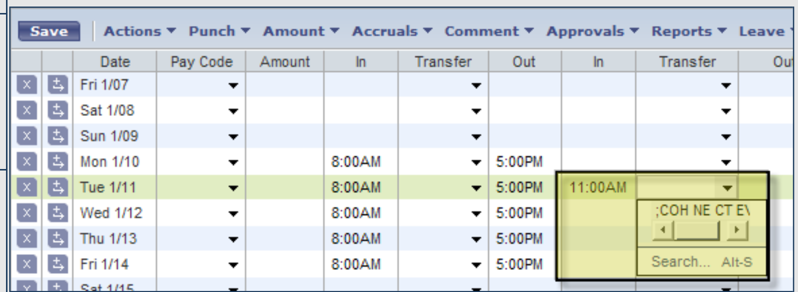
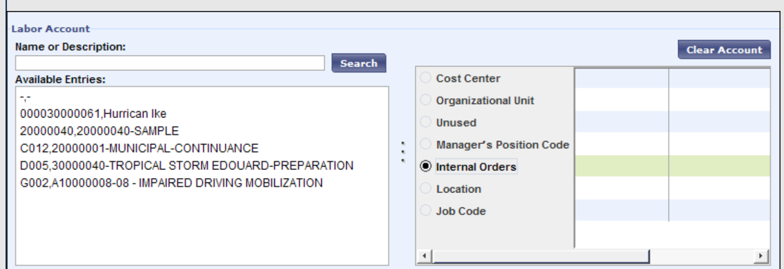
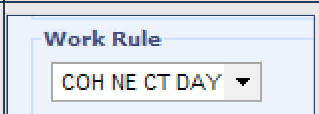
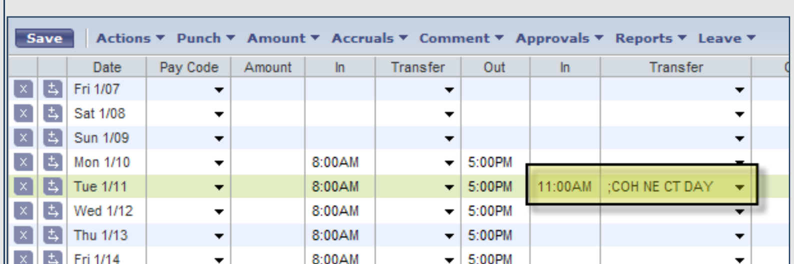
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule for a portion of his or her shift. You need to record the transfer in the application so that the right labor account is charged and the right work rule is applied. You or the employee can record the transfer at a terminal or directly in the schedule or timecard.

Example

On Tuesday an employee worked in a DAC, which is his primary labor account assignment, from 8:00 A.M. to 11:00 A.M. He then worked in another DAC from 11:00 A.M. to 5:00 P.M. Access the employee's timecard and transfer his worked hours for Tuesday of the previous pay period from 11:00 A.M. to 5:00 P.M. to the applicable DAC.

Steps	
1	Select **Timekeeping > 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** quick link.
4	Click the second **In** punch cell for the date you want to record the transfer.

Steps

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? Yes - Select the labor account or work rule and skip to #10. No - Select **Search** and continue to the next step.	
8	What kind of transfer(s) do you want to perform using the **Select Transfer** dialog box? To transfer hours to another labor account, click a labor level option and select the labor level from the **Available Entries** list.	
	To transfer hours to another work rule, select the work rule from the **Work Rule** drop- down list.	
9	Click **OK**.	
10	Click **Save**.	

Historical Edits

Purpose

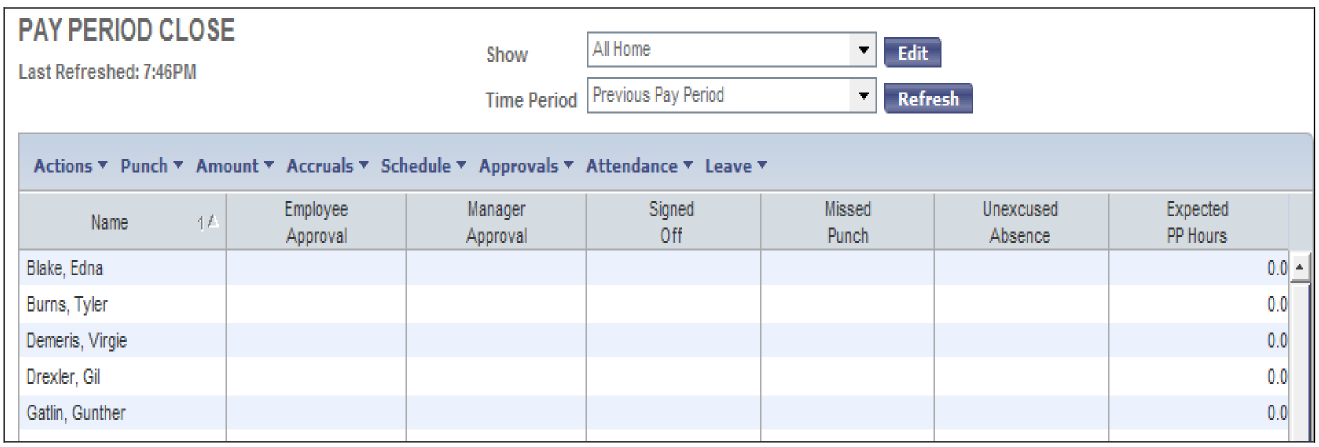
Once a pay period has been closed, only Central Payroll can make changes to an employee's timecard.

Finalizing Timecards

Reviewing Time Data Using the Pay Period Close Genie

Purpose

The Pay Period Close Genie helps you to identify timecard discrepancies at the end of a pay period so that you can perform any final edits. You must correct all exceptions before time data is signed off by Payroll and timecards are locked. Otherwise, employees may not get paid correctly for that pay period.



Approving Individual Timecards

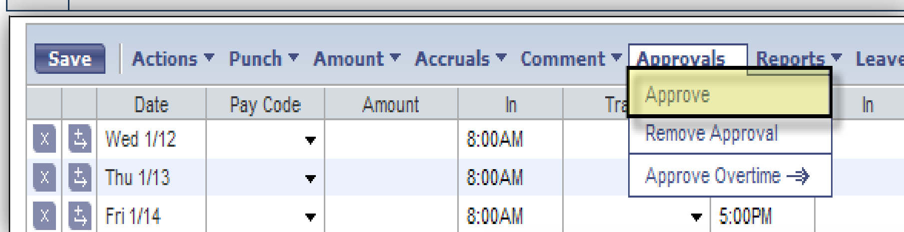
Purpose

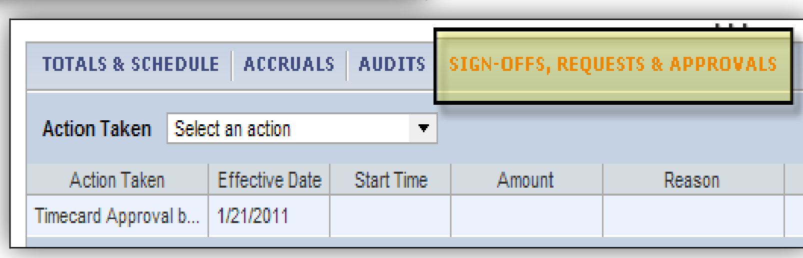
After you finish editing your employees' timecards, you need to approve them to indicate to payroll that they are ready for processing. You can approve timecards on a Genie or on a timecard itself. After you approve a timecard, the employee cannot make any edits to it unless you remove your approval.

Example

You 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, (select **Timekeeping > 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 **Approvals > Approve**.
5	Do you want to check the approval status on the timecard or a Genie? To check the approval status on a timecard, click the **Sign-offs, Requests & Approvals** tab. To check the approval on a Genie, access the **Pay Period Close Genie**, click **Refresh**, and review the **Manager Approval** column.





Tip

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

Approving Multiple Timecards

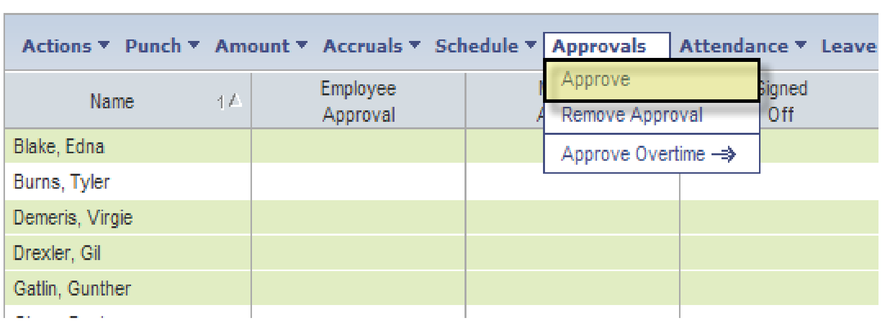
Purpose

Once you have reviewed and updated your employees' timecards, you can approve them all at once, rather than approving them individually. When you approve multiple timecards at once, use the Group Edit Results page to confirm that all of them are approved. If one or more of the timecards are not approved, the Details link on the Group Edit Results page identifies whose timecard was not approved and why.

Example

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

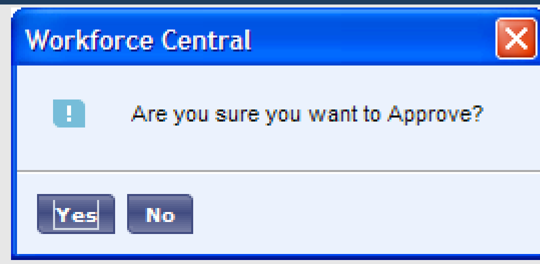
Steps	
1	Access a Genie, (select **Timekeeping > Pay Period Close** Genie.
2	Select the specific set of employees from the **Show** drop- down list. Select the specific time period from the **Time Period** drop- down list.
3	Do you want to approve timecards for all employees or specific employees? To approve timecards for all employees in a Genie, select **Actions > Select All**. To approve timecards for specific employees, hold the **Ctrl** key and select each employee.
4	Select **Approvals > Approve**.



Steps

5

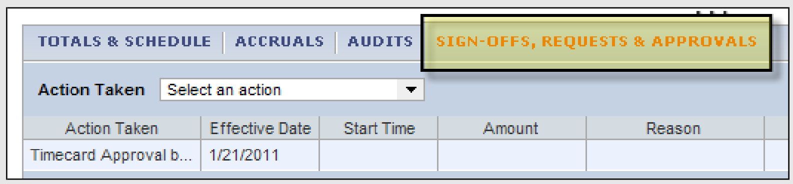
Click **Yes** to confirm your approval.



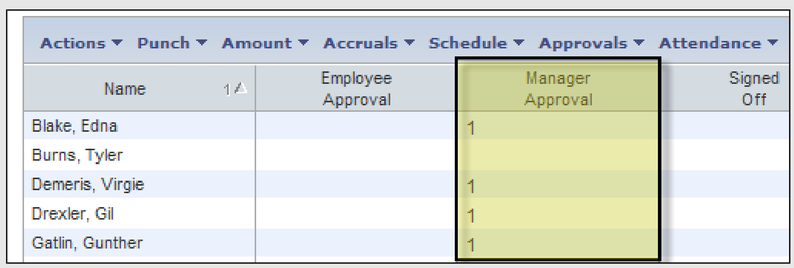
6

Do you want to confirm the status of your approval on a timecard or a Genie?

To confirm the approval status on a timecard, click the **Sign- offs & Approvals** tab and review the **Approval by Timekeeper/supervisor** information.



To confirm the approval on a Genie, access the **Pay Period Close Genie**, click **Refresh**, and review the **Manager Approval** column.



Business practice

Approval on all previous pay period timecards must be completed by 12 noon on Saturday; other departments at 10 am on Monday. Please review your departmental email notification.

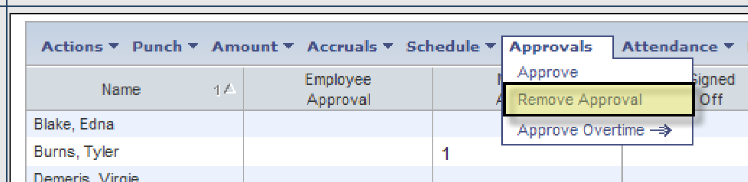
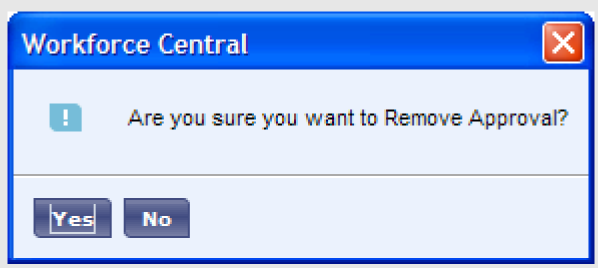
Removing Approvals

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 realized you forgot to enter four hours of sick 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 sick time for that Wednesday, and then re-approve the timecard for that day.

Steps		
1	Access a Genie, (select **Timekeeping** **> 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.	
4	Select **Approvals > Remove Approval**.	
5	Click **Yes** to confirm that you want to remove your approval.	

Signing off Timecards (ARA Payroll Services)

Purpose

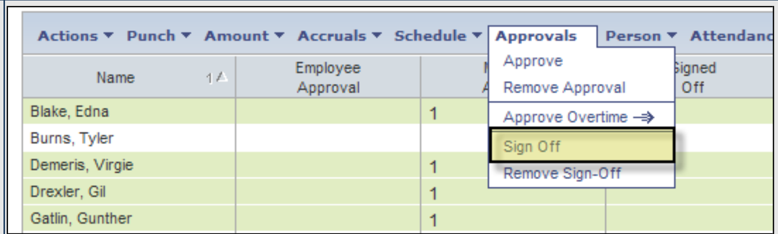
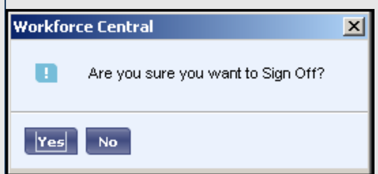
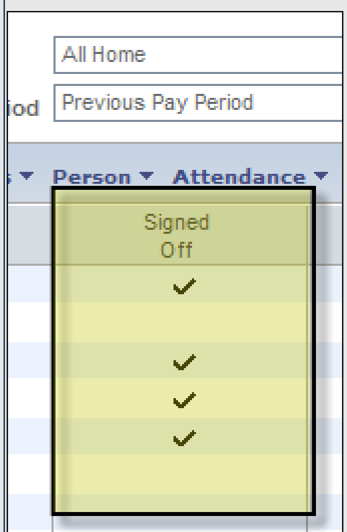
Signing off prevents unauthorized users from making additional edits to timecard data, which ensures accurate payroll processing. Before you sign off the data and begin payroll processing, you should perform a final validation of the timecard. After sign off, you can make no further edits to timecard data, including removing an approval. This restriction reduces the number of last-minute changes while you prepare to process payroll.

You can sign off timecards on a Genie or on a timecard. You do not need to select a time period because the application performs sign off on all dates from the previous signed-off period through the previous pay period.

Example

It is the end of the pay period and you have completed a final review of employees' timecard data. You must sign off all employees' time from the Pay Period Close Genie. You confirm the success of the sign off on the Group Edit Results page.

Steps	
1	Access a Genie, (select **Timekeeping > Pay Period Close** Genie.
2	Confirm that the timecard(s) have been approved by reviewing the **Timekeeper / Supervisor Approval** column. You might need to click **Refresh** to display the most current information.
3	Do you want to sign off timecards for all employees or specific employees? 1. To sign off timecards for all employees who appear in the Genie, select **Actions > Select All**. 2. To sign off timecards for specific employees, hold the **Ctrl** key and select each applicable employee.

Steps		
4	Select **Approvals > Sign Off**.	
5	Click **Yes** to confirm the sign off.	
6	To confirm the sign-off status on a timecard, click the **Sign-offs & Approvals** tab and review the **Sign Off** information. To confirm the sign-off status in a Genie, access the **Pay Period Close Genie**, click **Refresh**, and review the **Signed Off** column. To confirm the status of a group sign off, click the **General** tab, select **Group Edit Results**, and review the **Signed Off** information.	
7	If the Group Edit Results indicate that some timecards are not signed off, click the **Details** link and review the reasons why.	

Business practice

Sign off on all previous pay period timecards must be completed by 3 P.M. Central on payroll Monday.

Note

This task is performed by Payroll.

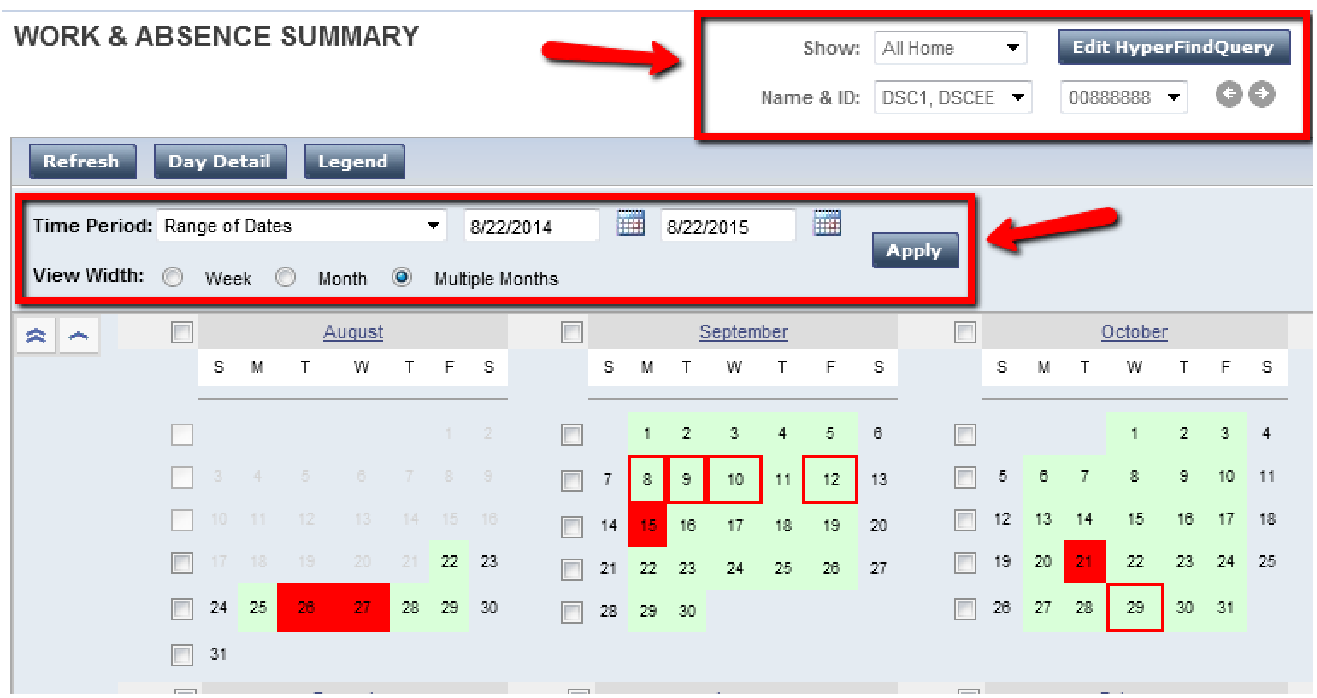
Performing Additional Timekeeper/Supervisor Tasks

Using the Work & Absence Summary Calendar

Purpose

You can use the Work & Absence Summary calendar to identify trends in worked and time-off events for employees. The calendar-like display makes it easy for you to see whether an employee has a pattern of taking time off or of arriving late on a specific day. You can see trend information such as the following:

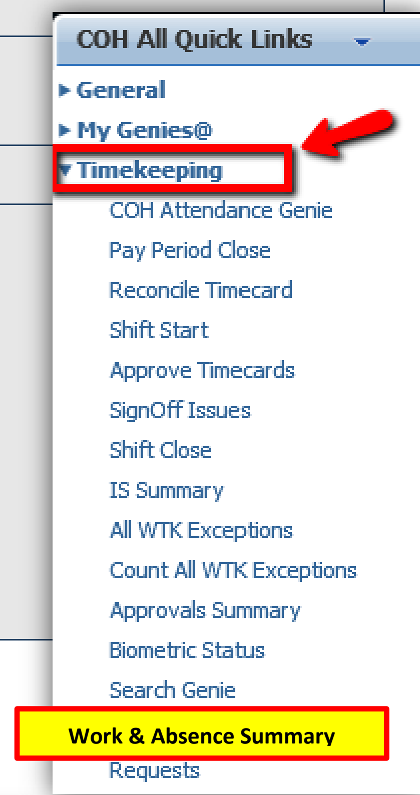
- Number of days the employee has arrived late to work
- Number of Mondays the employee has called in sick
- Number of weekends the employee is scheduled and has worked

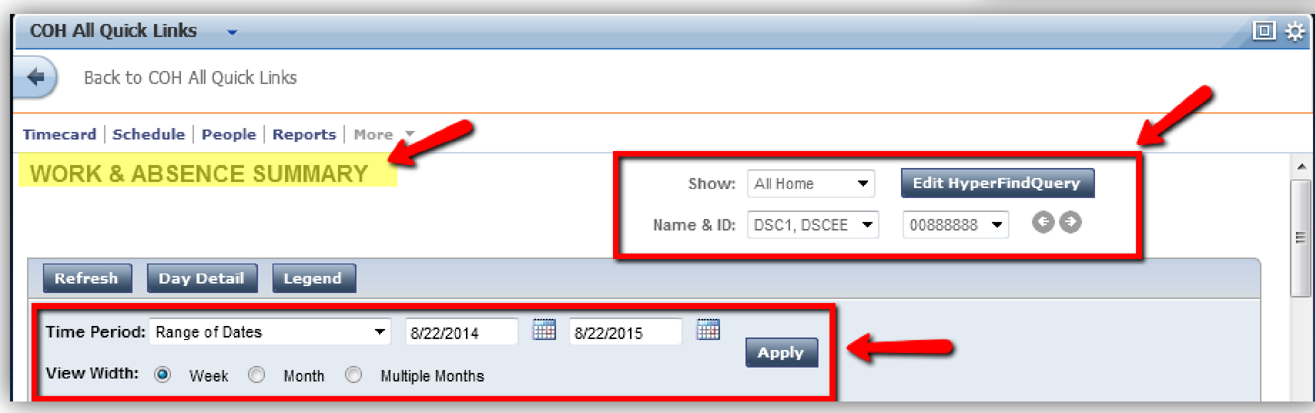


Example

You are scheduled to deliver a performance review with an employee this week. Prior to the meeting, you would like review the employee's calendar for the year. Access the Work & Absence calendar to review the employee's attendance calendar.

Steps	
1	Select **Timekeeping > Work & Absence Summary** calendar.
2	Select a group of employees from the **Show** list.
3	Select an employee from the **Name & ID** list.
4	Select the specific time period from the **Time Period** drop-down list.
5	Select the **View Width** option to review attendance events in a weekly calendar, monthly calendar or in multiple months. ➢ Click **Apply**. ➢ For Example, to see how many attendance events the employee has over a month, o select **Month** and then click **Apply**.
6	(Optional) Select one or more days and click **Day Detail** for more detailed information.





Requesting Backup Coverage

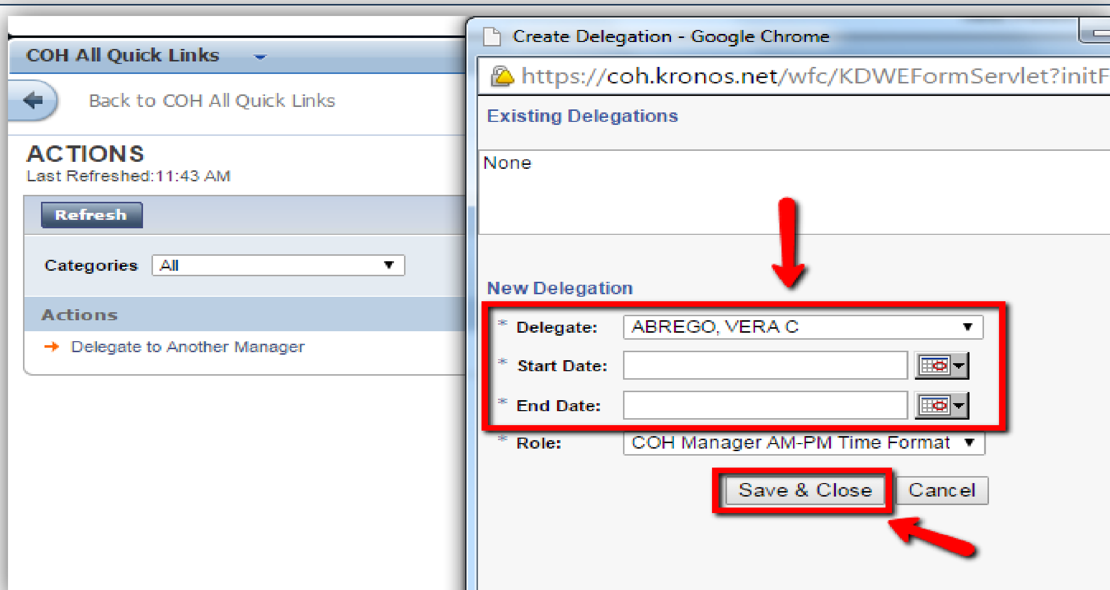
Purpose

You can temporarily delegate your timekeeper/supervisor authority to perform your timekeeping and scheduling tasks to other timekeepers/supervisors. The other timekeepers/supervisors 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. You can only delegate to one (1) supervisor at a time.

Example

You are going out on vacation. You send a delegation request to another timekeeper/supervisor 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 **General >Actions > Delegate to Another Manager**. If other delegation assignments exist, click **Create New Delegation**.
2	From the **Delegate** drop-down list, select the **timekeeper/supervisor** to whom you want to delegate your tasks.
3	Select the **Start Date** and **End Date** to indicate when you want to delegate your tasks.
4	From the **Role** drop-down list, select the profile that identifies which tasks you want to delegate. Contact your Kronos Administrator if the role profile you require does not appear in the list.
5	Click **Save & Close**. The application sends the delegation request to other timekeeper's/supervisor's Inbox.



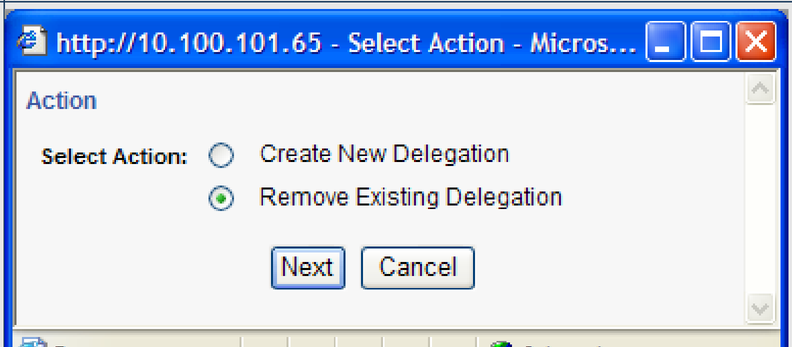
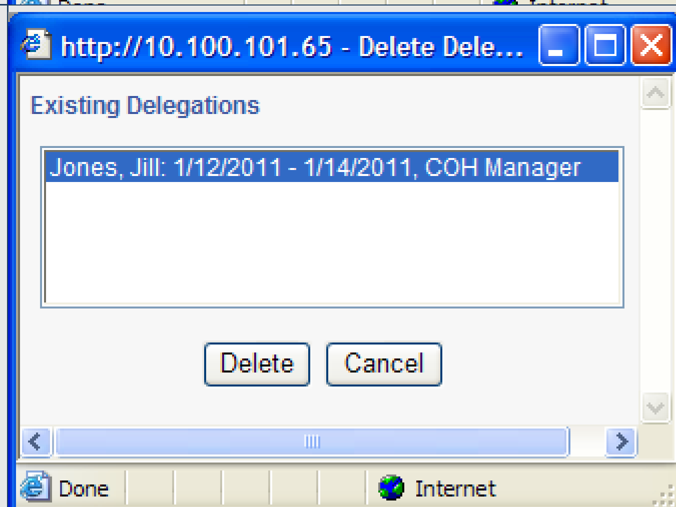
Canceling Delegation

Purpose

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

Example

You had delegated your timekeeper/supervisor tasks to another timekeeper/supervisor through the end of next week so that you could take vacation time. You have since changed your plans and will not be taking vacation after all. Now you need to cancel the delegation.

Steps		
1	Select **General >Actions > Manager Delegation**.	
2	Click **Remove Existing Delegation**.	
3	Select the existing timekeeper/supervisor delegation that you want to cancel and click **Delete**.	

Accepting or Declining Backup Coverage Requests

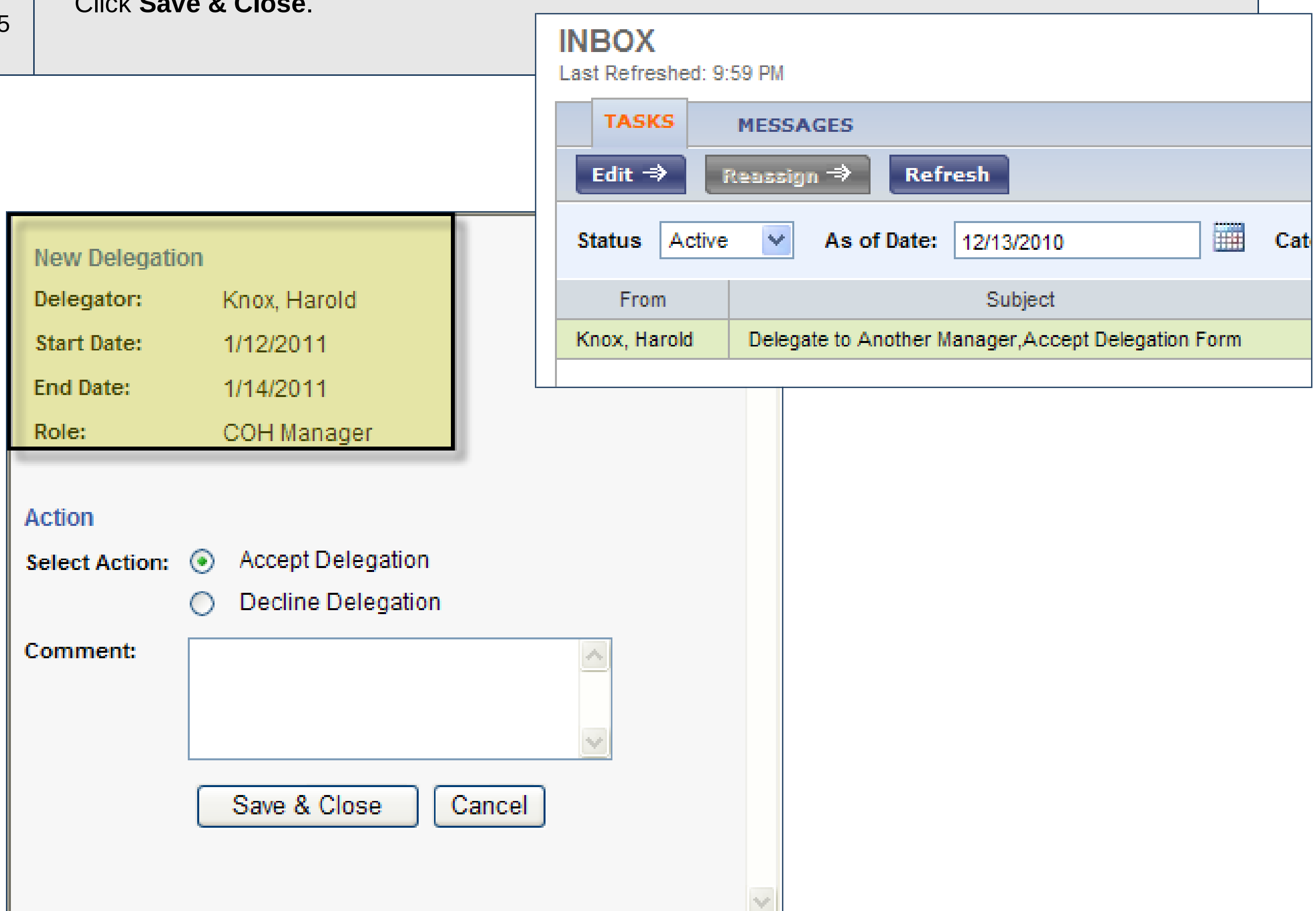
Purpose

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

Example

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

Steps	
1	Select **General >**Access the **Inbox**.
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 timekeeper/supervisor in the **Comment** field.
5	Click **Save & Close**.



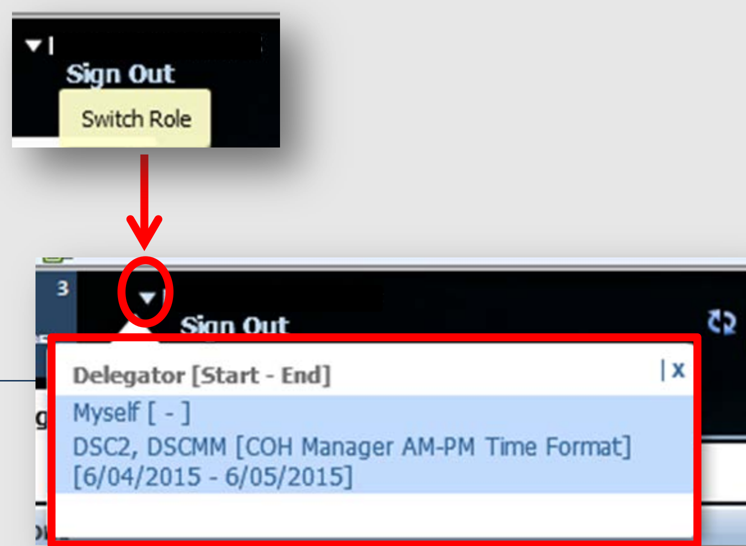
Switching to Delegated Roles

Purpose

After you accept a delegation request, the application automatically provides you with access to the tasks defined in the role profile on the specified start date. A Switch Role link appears as a quick link so that you do not have to log on as the timekeeper/supervisor who delegated the tasks to you. The link identifies which role you currently are working.

Example

Another timekeeper/supervisor delegated his tasks to you this week and you are ready to perform his timekeeper/supervisor 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.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Click the Switch Role quick link.
Note: If you do not see the Switch Role link, log off and then log on again using your own user name and password.</td><td rowspan="2">
</td></tr>
<tr><td>2</td><td>Select the timekeeper/supervisor whose tasks you will perform as his or her delegate and click Switch Role.</td></tr>
</table>

Note

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

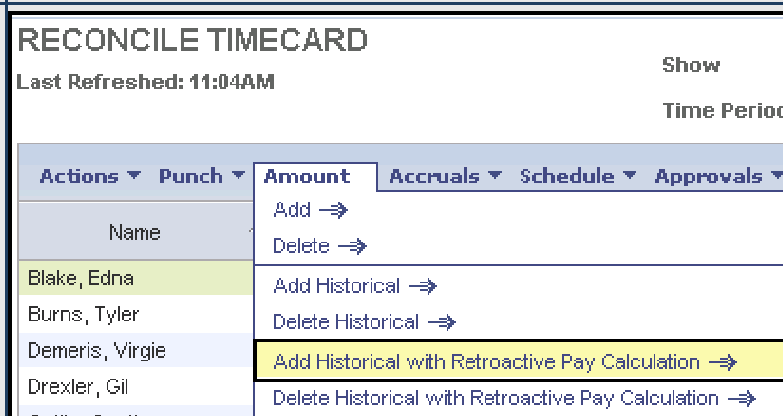
Making an Historical Edit with Retroactive Pay Calculation (ARA Payroll Services)

Purpose

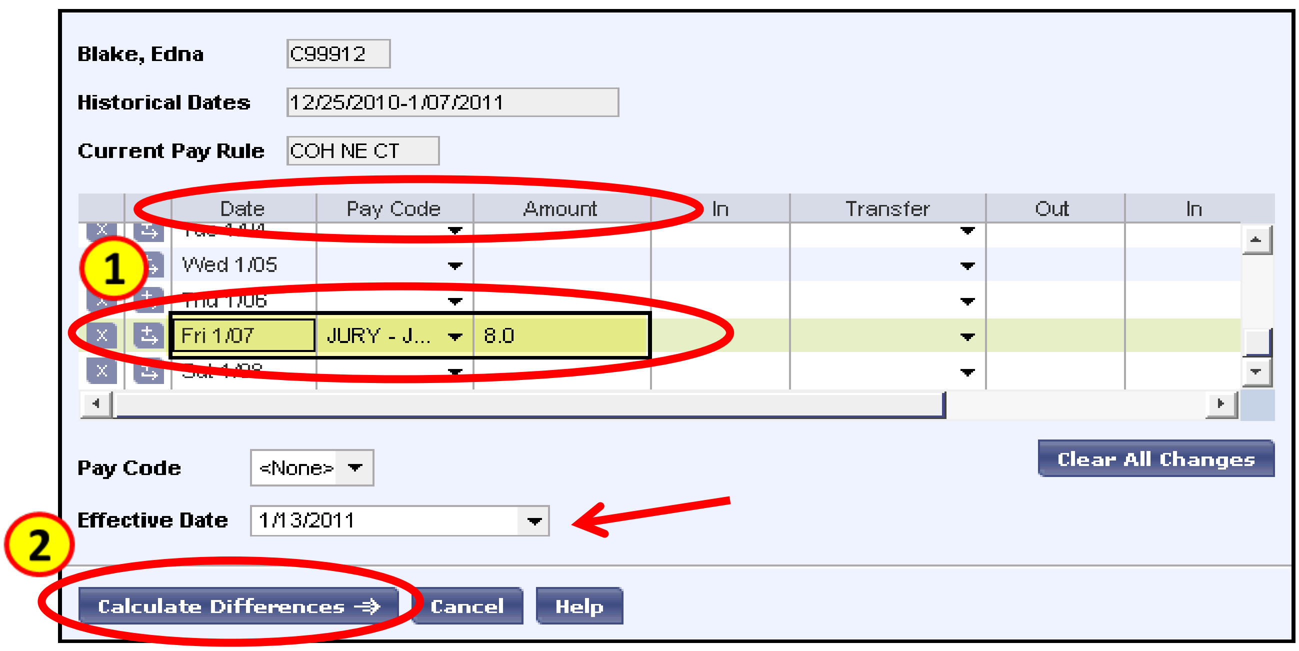
If you need to make a change to an employee's timecard after it is signed off, you enter an historical edit. Use an historical edit with retroactive pay calculation when you need to add or remove an amount, such as holiday time. The amount entered will be included in the employee's current pay period totals.

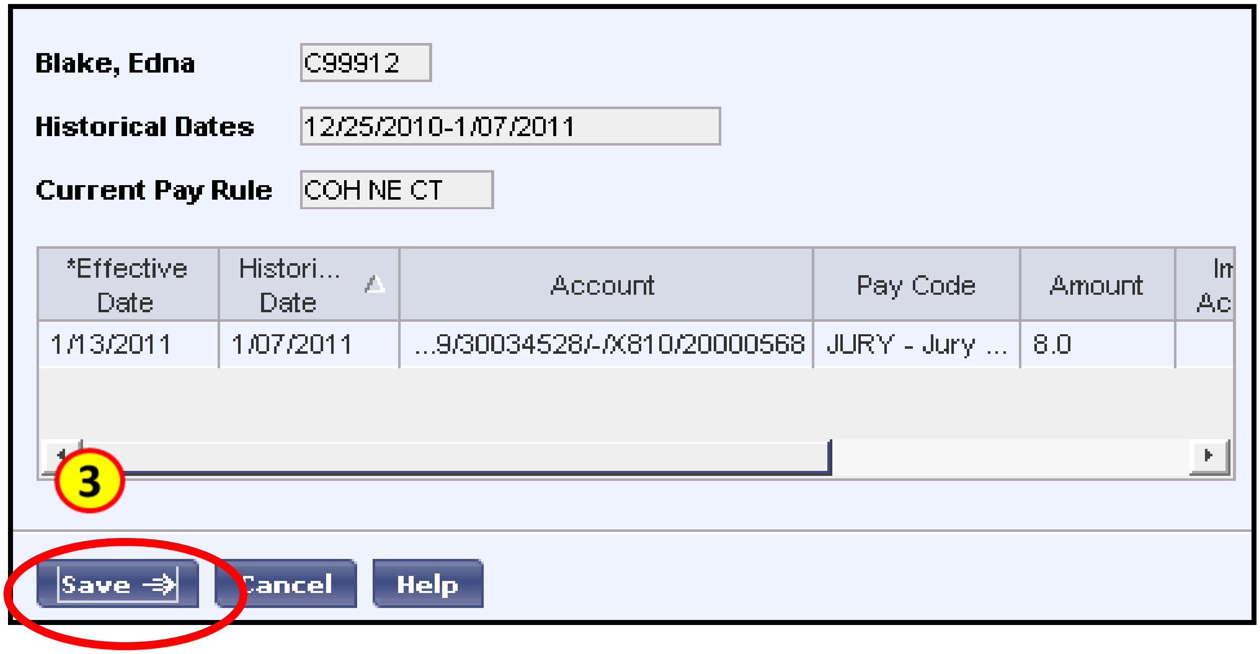
Example

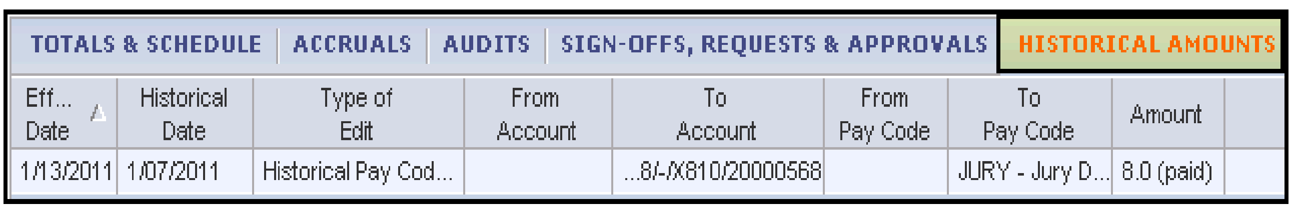
A pay code adjustment was overlooked in a prior signed off pay period. You must record an historical edit to correct the mistake and pay the employee.

Steps		
1	From any Genie, select the employee you want to edit and click the **Timecard** quick link.	
2	Select **Amount > Add Historical with Retroactive Pay Calculation**.	
3	If applicable, click the **Insert Row** icon to add another row for the date you want to add hours.	

Steps	
4	Select the pay code to which you want to add the hours from the **Pay Code** drop-down list.
5	Enter the number of hours in the **Amount** box. **Note**: You can add negative hours if applicable.
6	Confirm the current date in the **Effective Date** field.
7	Click **Calculate Differences**.
8	Confirm the **Include in Totals*** checkbox is checked to include the historical edit amount in the totals paid to the employee in the current pay period.
9	Click **Save**.
10	Click the **Historical Amounts** tab on the employee’s timecard to verify that the edit was successful.




Blake, Edna
C99912
Historical Dates
12/25/2010-1/07/2011
Current Pay Rule
COH NE CT
*Effective Date
Histori... Date
Account
Pay Code
Amount
1/13/2011
1/07/2011
...9/30034528/-/X810/20000568
JURY - Jury ...
8.0
3
Save
Cancel
Help


TOTALS & SCHEDULE
ACCRUALS
AUDITS
SIGN-OFFS, REQUESTS & APPROVALS
HISTORICAL AMOUNTS
Eff... Date
Historical Date
Type of Edit
From Account
To Account
From Pay Code
To Pay Code
Amount
1/13/2011
1/07/2011
Historical Pay Cod...
...8/-/X810/20000568
JURY - Jury D...
8.0 (paid)