



Workforce Dimensions
Timekeeping and Basic Scheduling
Manager Tasks and Outcomes

Exercise Workbook

Revision C-UA

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 Scheduling and Timekeeping: Manager Tasks and Outcomes
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About this Training

This training is designed to give you the basic skills necessary to begin using the Workforce Dimensions solution.

Learning Objectives

After completing this course, you should be able to:

- Navigate the Home page and Dataviews
 - Hide, show, and move Home page tiles
 - Take action in a Home page tile
 - Show, hide, sort, and filter Dataview columns
 - Group a Dataview by a column and add calculations
 - Create a chart and add it to your Home page
- Review notifications in Control Center
 - Take action on notifications in the Control Center preview panel
 - Filter, review, and take actions on notifications in Control Center
- Begin building a future schedule:
 - Assign schedule patterns to employees who work regular schedules
 - Edit, add, and delete shifts
 - Add a paycode to an entire shift and part of a shift
 - Transfer an employee into a different job
 - Manage a time-off request
 - Run a report
- Prepare timecards for payroll:
 - Add punches
 - Add a paycode
 - Perform a timecard transfer
 - Address timecard exceptions

Accessing Exercises

This course uses captured exercises for hands on practice. Access the exercise launch page using URL:

https://edweb1.kronos.com/education/WFD_UA/Tools_Templates/Captured_Exercises/Published/MTO_timekeeping_Exercise_Page/index.html

or a desktop icon.

Some typical Scheduling and Timekeeping manager tasks



Of course, these sample tasks are not all inclusive, are rarely consecutive, and often overlap between Scheduling and Timekeeping. This means that they usually must be handled daily within both modules. For example, during this training we'll look at a day in the life of a department manager and see how he:

- Interacts with tiles on his Home page, and with Dataviews
- Reviews and takes action on notifications in Control Center
- Works on a future schedule
- Manages employee requests for time off in the future
- Runs a report to evaluate a future schedule
- Edits timecards to address changes
- Approves employees' time for payroll processing
- Maintains a future schedule

Introductions



Michael Martin is a manager with a large group of employees. He is very busy, so he is excited to use Workforce Dimensions to help with his managerial tasks. Using Workforce Dimensions, he can:

- Use Home page tiles and Dataviews to monitor and work with data
- Review and respond to notifications
- Manage employee schedules
- Manage time-off requests
- Manage employee timecards
- Run reports to review pertinent data

As Michael Martin, a Department Manager, you'll begin by becoming familiar with the Home page, Dataviews, and Control Center. Next, you'll start building and modifying a schedule for the next schedule period. Then you'll take a break from the future schedule to do some daily maintenance on your employees' timecards.



Navigation

Navigation

In this section, you will be reintroduced to navigating Home pages and Dataviews, which you have learned about in previous training. After that, you'll have an opportunity for hands-on practice to see how to apply those concepts.

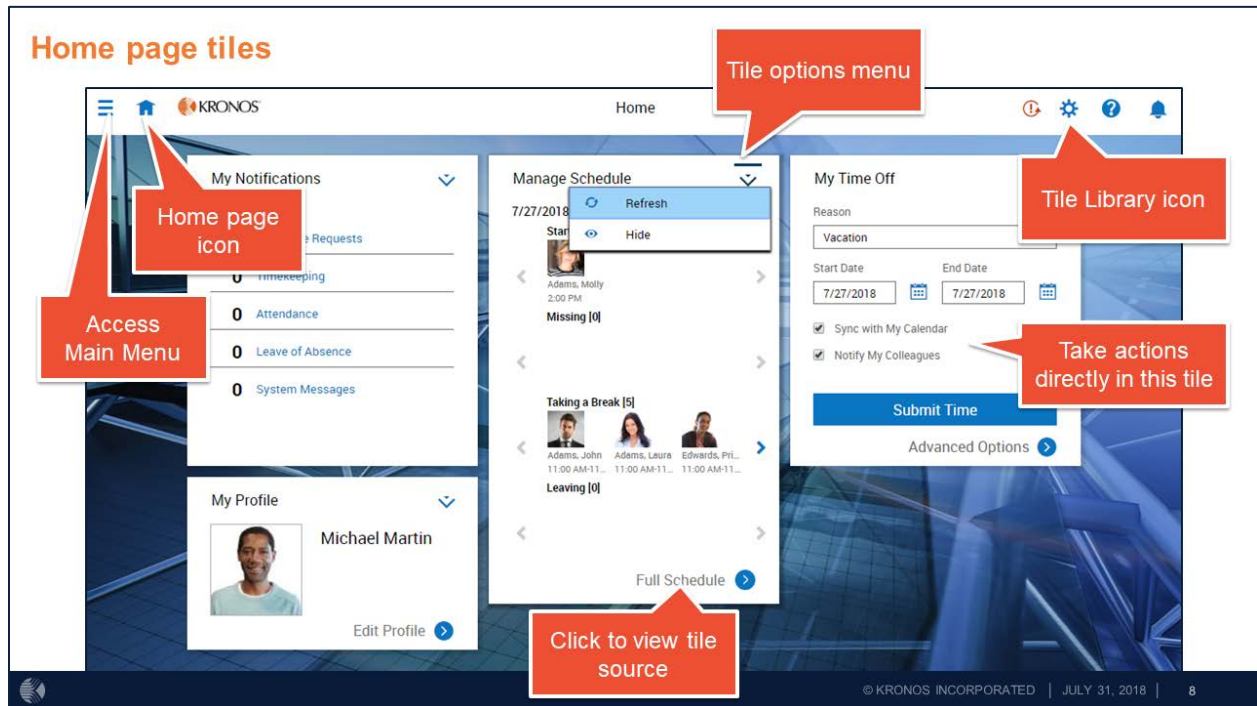
Scenario



Michael Martin would like to adjust the layout of his Home page. He would also like to make some adjustments to a Dataview he uses to monitor overtime and add a chart to his Home page so he can keep an eye on the data without having to access that Dataview.

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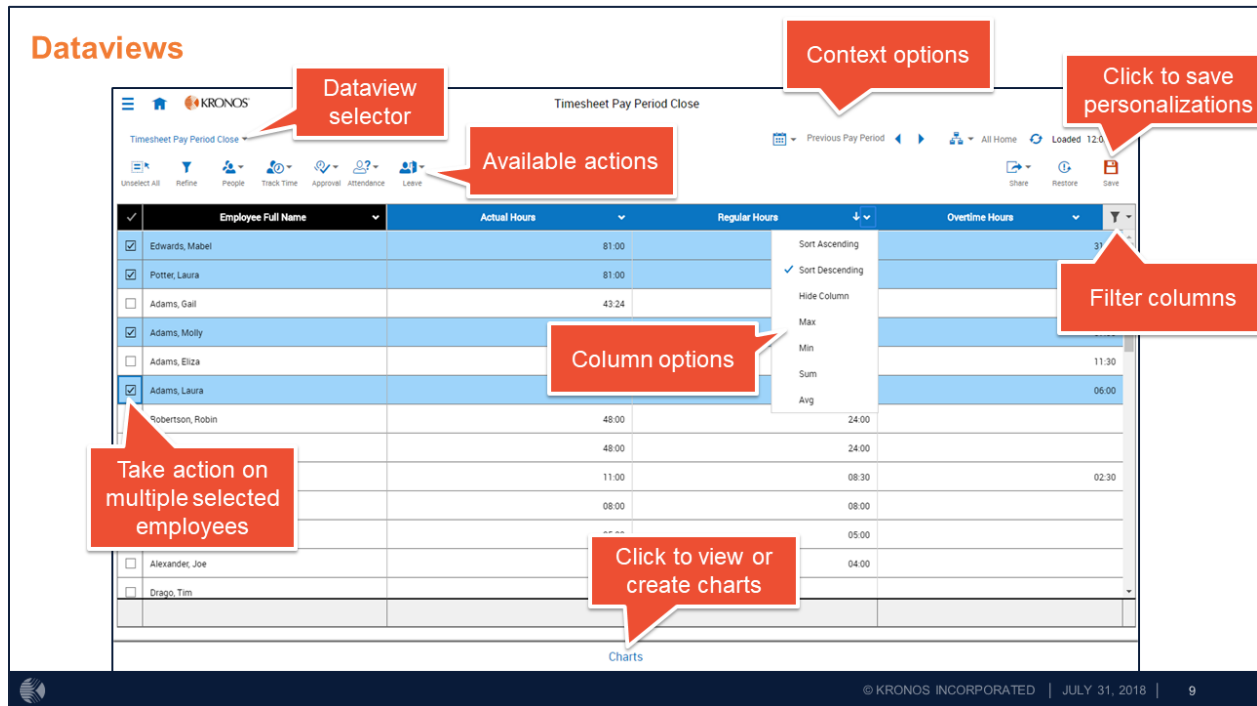


Your Home page is the first thing you'll see each time you log in to Workforce Dimensions. This is Michael Martin's Home page. On the Home page, Michael can:

- Take action directly in a tile
 - For example, Michael can submit a time-off request from the My Time Off tile
- Use a link in tile to go to the source page for that tile
 - For example, Michael can click Full Schedule to go to the Current Schedule page
- Hide and show tiles
 - For example, Michael can hide the My Profile tile to clean up his Home page, and/or choose additional tiles to show
- Open the Main Menu to access other pages
 - For example, Michael can access timecards, Dataviews, and reports through the Main Menu

Note that Michael can return to the Home page from any other Workforce Dimensions page by clicking the Home page icon.

Dataviews



Timesheet Pay Period Close

Employee Full Name | Actual Hours | Regular Hours | Overtime Hours

Edwards, Mabel | 81.00 | 81.00 | 31.00

Potter, Laura | 81.00 | 81.00 | 31.00

Adams, Gail | 43.24 | 43.24 | 0.00

Adams, Molly | 48.00 | 48.00 | 24.00

Adams, Eliza | 48.00 | 48.00 | 24.00

Adams, Laura | 11.00 | 11.00 | 08.30

Robertson, Robin | 08.00 | 08.00 | 02.30

Alexander, Joe | 05.00 | 05.00 | 0.00

Drago, Tim | 04.00 | 04.00 | 0.00

Sort Ascending
 Sort Descending
 Hide Column
 Max
 Min
 Sum
 Avg

Charts

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Dataviews are accessed in the Dataview Library, found in the Dataviews & Reports section of the Main Menu. Michael uses Dataviews to review, analyze, and act on vast amounts of data in Workforce Dimensions. Using a Dataview, Michael can:

- Take action on a selected subset of employees
 - For example, Michael can select several employees and then use the Approval action to approve all their timecards
- Sort and filter a column
 - For example, Michael could filter out all employees who have no Overtime Hours
- Add a calculation to a column
 - For example, Michael could create a calculation that displays the average number of Overtime Hours for all displayed employees
- Create or view a chart
 - For example, Michael could create a chart that displays a graph of Overtime Hours by employee

Note that Michael can click Save to keep any personalizations he has made to a Dataview (or click Restore to go back to the default settings). Some Dataviews display business structures instead of employees. In these Dataviews, you view and work with aggregated data from several business units, such as departments or facilities. Michael can use the Dataview selector to view a different Dataview, without having to use the Main Menu.

Chart tiles

The screenshot displays the 'Timesheet Pay Period Close' interface. At the top, there's a navigation bar with 'KRONOS' and 'Timesheet Pay Period Close'. Below this is a toolbar with icons for 'Unselect All', 'Refine', 'People', 'Track Time', 'Approval', 'Attendance', and 'Leave'. A data table is visible with columns for 'Employee Full Name' and 'Actual Hours'. Two employees are listed: Edwards, Mabel (81.00) and Potter, Laura (50.00). A red callout box labeled 'Chart type options' points to the table. Below the table is a 'Charts' section containing a 'Previously-created chart' tile titled 'Pay Period Close - Hrs Worked', which is a bar chart showing hours for various employees. A red callout box labeled 'Previously-created chart' points to this tile. To the right is a 'Create Chart' panel with options for 'Select Chart Type' (Vertical Bar, Horizontal Bar, Line, Pie) and 'Select Data' (Category, Metric, Values Calculation, Limit Data?). A red callout box labeled 'Data options' points to the 'Select Data' section. At the bottom of the interface, there is a footer with '© KRONOS INCORPORATED | JULY 31, 2018 | 10'.

Charts are viewed and created by clicking Charts at the bottom of a Dataview. The data in the chart will come directly from that Dataview and will dynamically update to reflect any changes to data in that Dataview. Michael uses charts to get a quick visual representation of the data he is most concerned about. He can select the type of visualization he prefers (for example, a Pie chart or a Line graph), and can specify what metrics and values to display. After creating a chart, he can even add it as a tile to his Home page.

Exercise # 1: Navigate the Home page



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Navigate the Home page

1. After Michael accesses Workforce Dimensions, he is brought to his home page.
2. In the **My Profile** tile, click the drop-down arrow and select **Hide**.
Notice that the My Profile tile is removed from the Home page.
3. Click the **Tile Library** icon (the gear) to add additional tiles to the Home page.
4. Scroll down and select **My Schedule** tile and the **My Time Off** tile.
5. Click **Apply**.
Notice that the tiles are added to the Home page.
6. Tiles can be rearranged on the Home page by dragging them to new positions. The **My Time Off** tile dragged above the **Manage Attendance** tile.
7. In the **Manage Schedule** tile, click **Full Schedule**.
Notice that this takes you to the **Current Schedule** page.
8. After viewing the **Current Schedule**, click the **Home** icon to return to the Home page.
9. Click the **Main** menu to access another Workforce Dimensions page.
10. Click on **Time** and then **Employee Timecards**.
Notice that the Employee Timecards page opens.
11. Click the **Home** icon.
12. You are ready to leave Workforce Dimensions. To sign out, click the Main menu icon.
13. Click **Sign Out** to exit Workforce Dimensions.

Exercise # 2: Navigate a Dataview



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Navigate a Dataview

1. On the Home page, click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Expand the **Dataviews & Reports** section of the main menu and click **Dataview Library**.
3. Click the **Overtime Analysis** link.
4. Click the timeframe calendar icon and select **Previous Pay Period**.
5. Click the **Overtime Hours as %...** column's drop-down list and select **Hide Column**.
6. Click the filter icon to the right of the column headers and select **Primary Job** from the list. Notice that this displays the previously-hidden Primary Job column.
7. Click the **Primary Job** column header and drag to the left until it is between the **Employee Full Name** column and the **Overtime Hours** column.
8. To filter **Overtime Hours** to include only those rows that are not null, click the filter icon again and select **Show Filters Row**.
9. At the top of the **Overtime Hours** column, click the drop-down list and select **Is Not Null**. Notice that this filters out any employee data row that has no Overtime Hours value.
10. Click the filter icon and select **Hide Filters Row** (but notice that the filter remains in effect).
11. At the top of the **Overtime Hours** column, click the drop-down list and select **Sort Descending** to reverse the sort order.

[Continued on following page]



12. At the top of the **Overtime Hours** column, click the drop-down list and select **Sum** to total the Dataview column. Notice that this creates a calculation at the bottom of the column, showing the total overtime hours for the pay period.
13. At the top of the **Primary Job** column, click the drop-down list and select **Group by this Column**.
Notice that this creates a calculation at the bottom of the column, showing the total overtime hours for the pay period.
14. At the top of the **Primary Job** column, click the drop-down arrow and select **Group by this Column**.
Notice that the sum of the overtime hours is now calculated for the group.
15. Expand the left of the **Sales Associate** group name to expand the group.
Notice that the employees in this group are still sorted in descending order by **Overtime Hours**.
16. Click **Save** to retain this personalization.
17. To return to the Home page, click the Home icon.

Exercise # 3: Create a Chart



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Create a Chart

1. On the Home page, click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Expand the **Dataviews & Reports** section of the main menu and click **Dataview Library**.
3. Click the **Overtime Analysis** link.
4. Click **Charts** at the bottom of the page.
5. Click the **Tile Library**  icon in the **Charts** panel.
6. Click the **Create Chart** icon .
7. For **Select Chart Type**, select **Vertical Bar**.
8. For **Category**, select **Primary Job**.
9. For **Metric**, select **Overtime Hours**.
10. For **Values Calculation**, select **Sum**.
11. Keep the default value of **Off** for **Limit Data**. If set to **On**, the **Limit Data** option allows you to restrict the data displayed in a chart to a specific number of top or bottom values.
12. For the **Title**, keep the default of **Overtime Hours by Primary Job**. Click the vertical scroll bar to scroll down.
13. Ensure that all items under **Select Items to Display** except **Category Title** are enabled and click **Save**.
14. To add the chart to your Home page as well, click the **Home** icon to return to the Home page.

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16. Click the **Setting** icon to access the **Tile Library** icon.
17. In the **Tiles** panel, click the vertical scroll bar to scroll down to the **My Charts** section and select the new chart you just created (**Overtime Hours by Primary Job**).
18. Click **Apply**.
19. The chart appears as a new tile. Click on a bar in the chart in the newly-added tile.
20. The Dataview from which the data is provided opens and is temporarily filtered to show only data related to the bar you clicked. Click the Home icon.

Notifications

Notifications

This section covers reviewing notifications in Control Center, which you learned about in previous training. After that, you'll have an opportunity for hands-on practice to see how to apply those concepts.

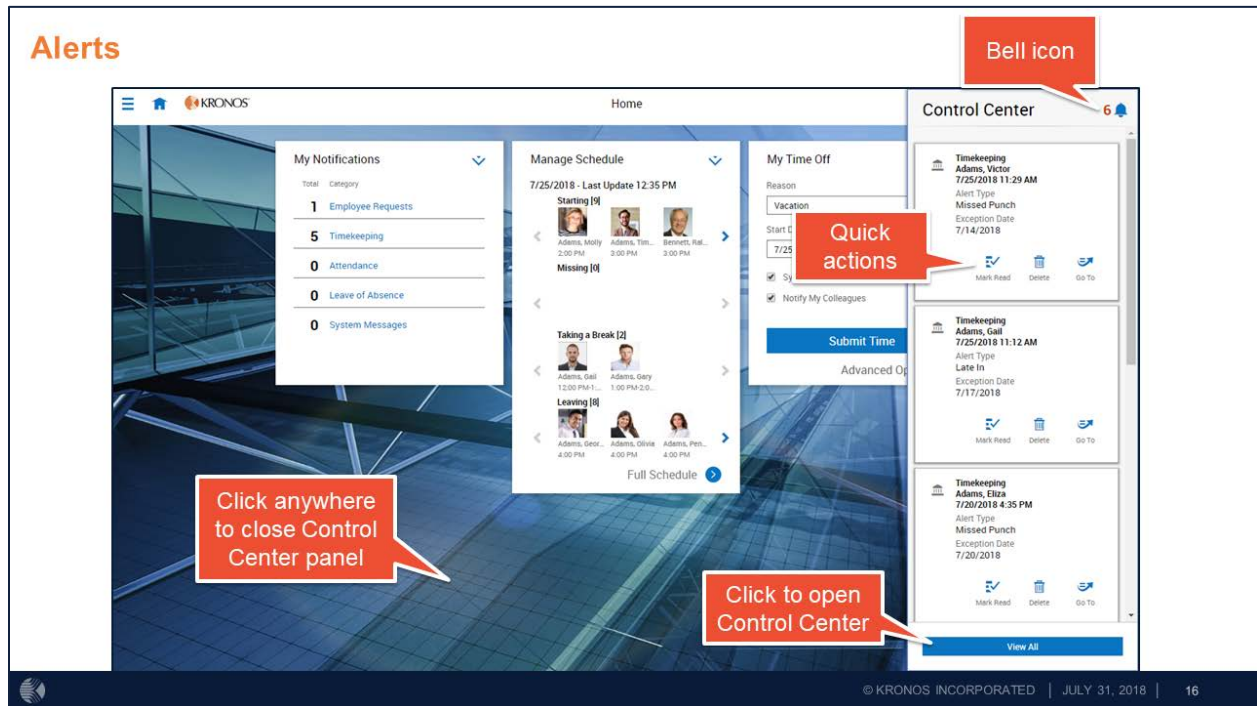
Scenario



Michael Martin wants to review any notifications he has received so he can handle new requests, incidents, and other noteworthy items in a timely manner.

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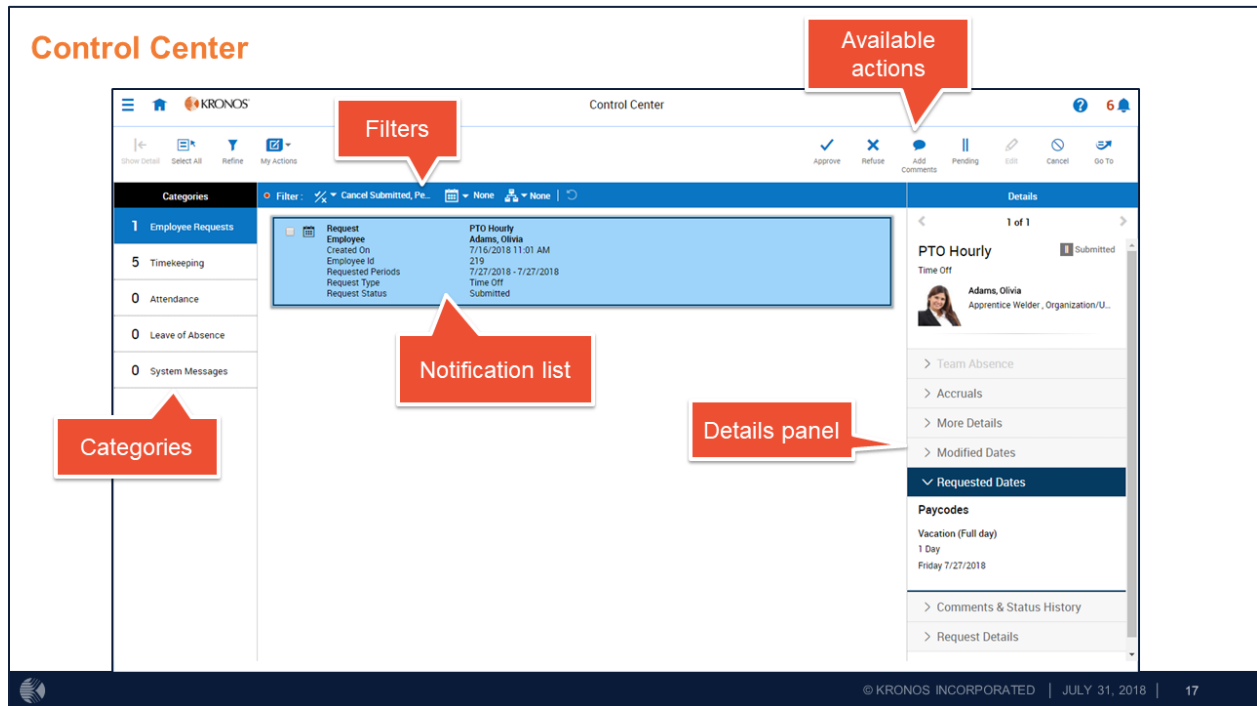




Alerts appear in the corner of all of Michael's Workforce Dimensions pages. Clicking the bell icon opens the Control Center panel. With Alerts, Michael can:

- View the number of notifications he has not yet reviewed or acted on
 - For example, in the above screenshot Michael can see that he has 6 notifications he has not yet handled
- Mark individual notifications as reviewed, or take action on appropriate notifications directly from the panel
 - For example, Michael can approve a time-off request he has been expecting to receive and knows he is willing to approve without reviewing further details
- Go to the Workforce Dimensions page relevant to a notification
 - For example, by clicking Go To for an Exceptions notification Michael can immediately open the employee's timecard with the relevant date and punches displayed
- Click View All to access Control Center, where he can view notifications by category and in greater detail
 - For example, Michael can see the details of a time-off request, or review older notifications he has already handled and that no longer appear in the panel

Note that Michael can close the Alerts panel by clicking anywhere outside the panel.



While the Alerts panel provides Michael with a quick view of his most immediately notifications, the Control Panel is where Michael goes to view notifications in greater detail or to look up notifications he has already handled in the past. With Control Center, Michael can:

- View notifications by category
 - For example, Michael can review the Employee Requests category so he can deal with those notifications immediately
- Filter the list of notifications
 - For example, Michael can filter the notification list so that only notifications received on a certain date or dates appear
- Review the details of the selected notification in the Details panel
 - For example, Michael can review any comments or additional information submitted as part of a time-off request
- Take action on the selected notification
 - For example, Michael can use any of the action icons appearing above the Details column to approve, refuse, or otherwise handle a time-off request

Exercise # 4: Review Alerts in the Control Center panel



Review Alerts in the Control Center panel

1. On the Home page, notice the number next to the bell icon, indicating how many notifications you have not yet addressed. Click the bell icon to open the Control Center panel.
2. Click the vertical scroll bar to scroll down and locate the notification regarding Howard's **Missed Punch** exception.
3. Michael is aware that Howard worked an unscheduled shift On Monday (10/08) from 7:30 am to 3:00 pm. Click **Go To**, which opens Howard's timecard.
4. In Howard Edwards's timecard, click in the Out cell for Mon 10/08 and enter the missing 3:00pm out punch (**3p**). Then press **Enter** to continue.
5. Click **Save**.
Note that correcting the missed punch does not automatically decrement the number next to the bell icon (nor does it remove the notification from the list).
6. To remove the notification, click the bell icon, locate the notification regarding Howard's **Missed Punch** (10/08), and click the **Mark Read** icon for that notification.
7. A **Success** message displays at the top of the panel. To return to the home page, click the Home icon.

Exercise # 5: Review Notifications in Control Center



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Review Notifications in Control Center

1. Click the bell icon to open the **Control Center** panel.
2. In the panel, click **View All** to open **Control Center**.
3. Verify that the **Employee Requests** category is selected, and that Olivia Adams's time-off request is selected (blue).
Note that more information about the request appears in the right-hand **Details** panel.
4. Since this is a time off request, click the **Accruals** option to see additional available information.
5. Click the **Accruals** heading again to collapse the detail.
Note the actions that you could take on this request are displayed above the Details panel. Those that are grayed out are not applicable to this request.
6. In this case, Michael would like to review the schedule before making a decision about this request; click the **Pending** icon to mark the request as pending.
7. Select the **Timekeeping** notification category.
8. Open the **Timeframe** filter and select **Last 30 Days** to limit the notifications to only those received within the last 30 days.
9. Click the drop-down list that currently displays the **New** option and select **Read** instead. Notice that this displays all of the Timekeeping notifications you have marked read in the past.

[Continued on following page]

11. Open the **Timeframe** filter and select **Last 90 Days**.
Notice that you are now viewing all Timekeeping notifications from the last 90 days that you have already marked as read.
12. Click **Refine**.
13. In the **Refine** panel, expand the **Employee Name** category and click **Sort Ascending**.
14. Click **Apply**.
Notice that the notifications are now sorted alphabetically by employee last name.
15. Click **Refine**.
16. Click the trashcan icon next to **Employee Name**, then click **Apply**.
Notice that the sort is now removed.
17. To return to the home page, click the **Home** icon.
18. If you have a **My Notifications** tile on your Home page, you can also refresh the notifications. Click the drop-down arrow for the tile and select **Refresh**.

Scheduling

Scheduling

In this section, you will be reintroduced to common Scheduling concepts you learned about in previous training. After that, you'll have an opportunity for hands-on practice to see how to apply those concepts.

Schedule patterns

Often, employees work the same hours and days of the week. Pattern templates allow you to assign a specified rotation of shifts to one or more employees, so that those shifts automatically populate their schedules.

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	
	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	



Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	
	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	



Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	
	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	

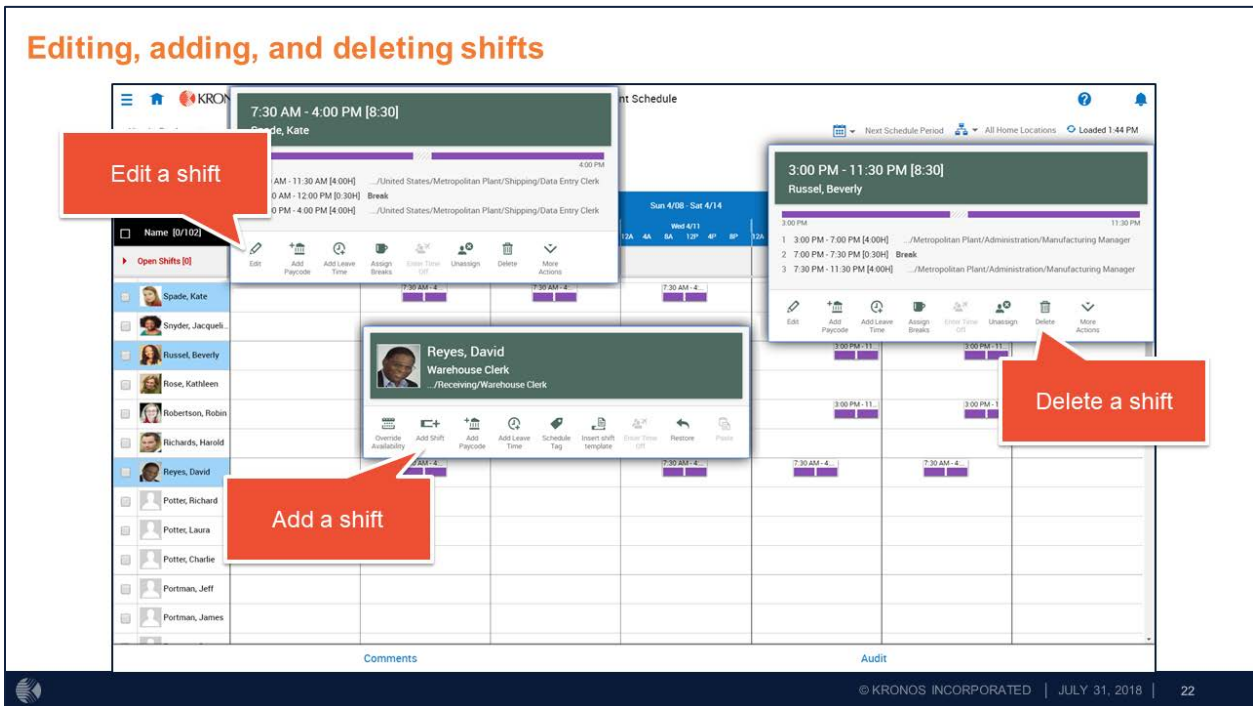


Example: Howard Edwards has a two-week schedule of alternating shifts:

- One week: 7:00 a.m. – 3:30 p.m., Monday – Friday
- Next week: 3:00 p.m. – 11:30 p.m., Monday – Friday

Howard's manager can assign a schedule pattern template to Howard so that his schedule will remain in place.

Editing, adding, and deleting shifts



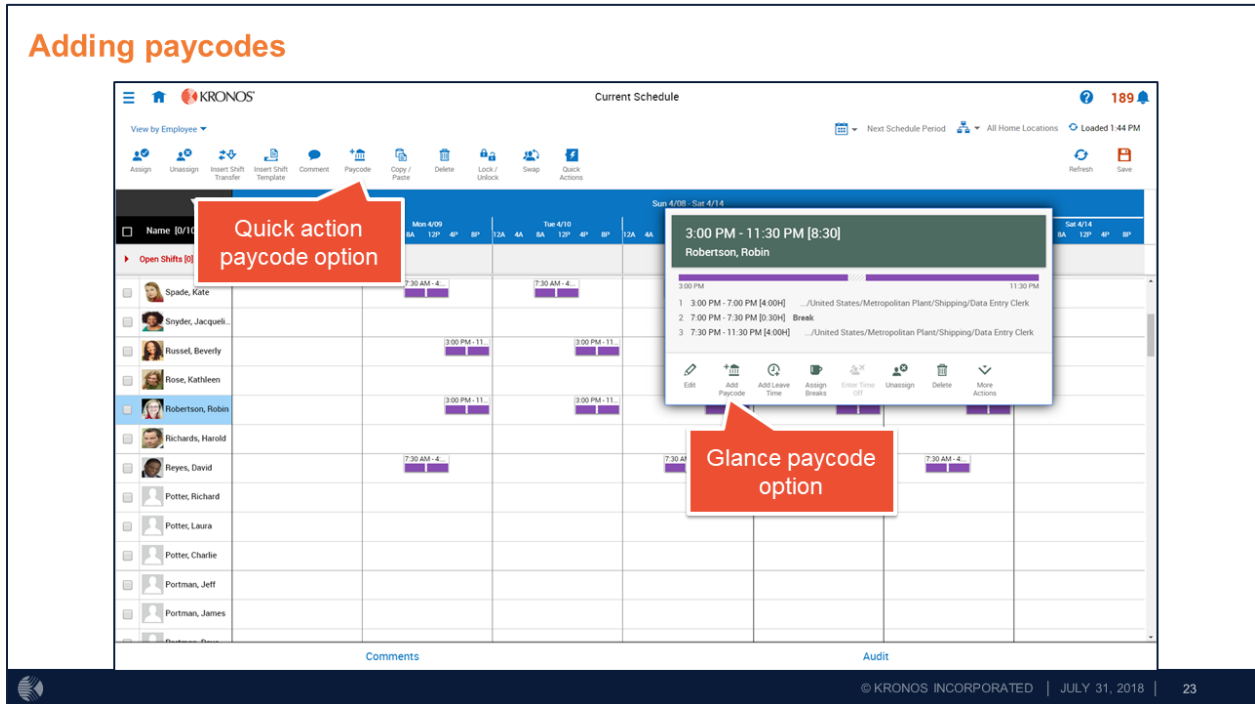
The screenshot displays a Kronos scheduling interface with a list of employees on the left and a grid of shifts for various dates. Three callout boxes highlight key actions:

- Edit a shift:** A callout box points to a shift for Spade, Kate (7:30 AM - 4:00 PM [8:30]). The context menu for this shift includes options like Edit, Add Paycode, Add Leave Time, Assign Breaks, Enter Time Off, Unassign, Delete, and More Actions.
- Add a shift:** A callout box points to the 'Add Shift' button in the context menu for Reyes, David (Warehouse Clerk). Other options in this menu include Override Availability, Add Paycode, Add Leave Time, Schedule Tag, Insert shift template, Enter Time Off, Restore, and Print.
- Delete a shift:** A callout box points to the 'Delete' button in the context menu for Russel, Beverly (3:00 PM - 11:30 PM [8:30]). Other options in this menu include Edit, Add Paycode, Add Leave Time, Assign Breaks, Enter Time Off, Unassign, and More Actions.

To modify a schedule, Michael Martin can:

- Edit existing shifts when changes are necessary.
 - For example, Michael can change the end time if an employee agrees to stay later than scheduled.
- Add an ad hoc shift or use quick actions to add a pre-defined shift.
 - For example, Michael can add hours to an employee's schedule when extra hours are needed to fulfill a business need.
- Delete a shift.
 - For example, Michael can remove scheduled hours from an employee's schedule if he or she is not needed on that day.

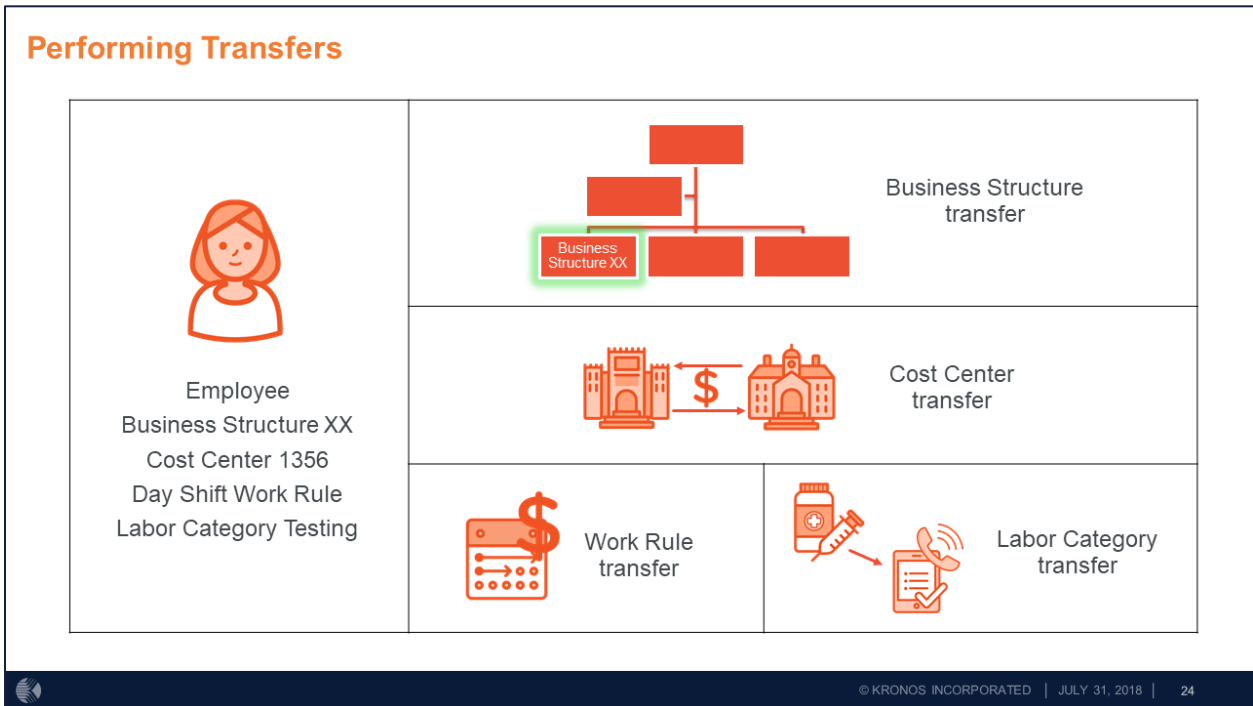
Adding paycodes



The screenshot displays the Kronos 'Current Schedule' interface. At the top, there are navigation icons and a toolbar with options like 'Assign', 'Unassign', 'Insert Shift Template', 'Comment', 'Paycode', 'Copy/Paste', 'Delete', 'Lock/Unlock', 'Swap', and 'Quick Actions'. A list of employees is on the left, including Spade, Kate; Snyder, Jacquelin; Russet, Beverly; Rose, Kathleen; Robertson, Robin; Richards, Harold; Reyes, David; Potter, Richard; Potter, Laura; Potter, Charlie; Portman, Jeff; and Portman, James. The main area is a grid showing shifts for Monday 4/9 and Tuesday 4/10. A callout box for 'Robertson, Robin' shows a shift from 3:00 PM to 11:30 PM [8:30] with a list of paycodes: 1. 3:00 PM - 7:00 PM [4:00H] .../United States/Metropolitan Plant/Shipping/Data Entry Clerk; 2. 7:00 PM - 7:30 PM [0:30H] Break; 3. 7:30 PM - 11:30 PM [4:00H] .../United States/Metropolitan Plant/Shipping/Data Entry Clerk. A 'Quick action paycode option' callout points to the 'Paycode' button in the toolbar, and a 'Glance paycode option' callout points to the 'Quick Actions' button.

When working on a schedule, Michael Martin can:

- Use a quick action to override a regular shift with a paycode.
 - For example, Michael can change a regular, productive shift to non-productive training hours.
- Add a paycode to part of a shift.
 - For example, Michael can replace part of a shift with paycode hours when an employee needs to leave early for a medical appointment.



Using the transfer feature, managers can:

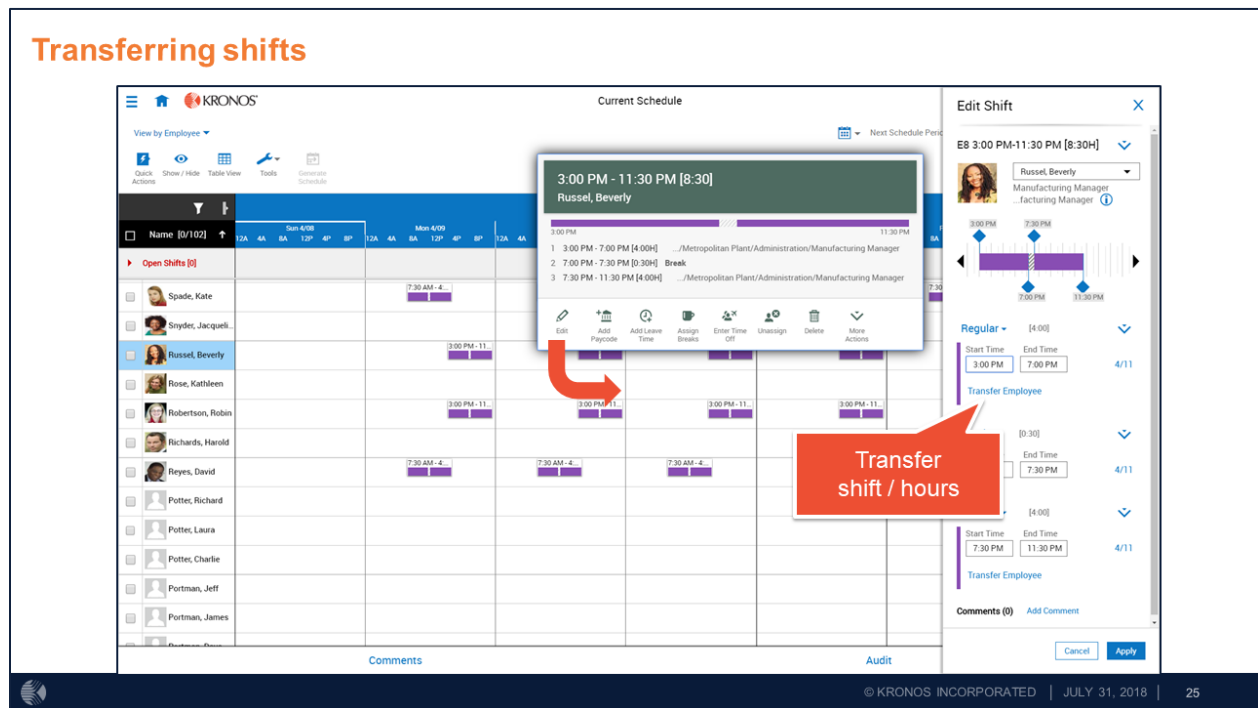
- Transfer employee hours to a different part of the business structure
 - For example, an employee who usually works as a cashier in Store A is cross-trained to work at the distribution center. His time worked can be allocated to the distribution center for accurate reporting and accounting.
- Use different work rules to calculate employee pay based on varying conditions.
 - For example, when an on-call employee is called in to work, they are paid additional money for those callback hours. When that happens, the employee's worked hours can be transferred to the applicable callback work rule to calculate pay accurately.
- Transfer employee hours to different cost centers
 - For example: A nurse who works in the Cardiology department is floated to ICU. Even though the nurse's pay will not be impacted, a manager can transfer the hours the nurse spent in ICU from the Cardiology cost center to the ICU cost center so that the nurse's pay will be allocated to the ICU cost center.

[Continued on following page]

Transferring shifts (cont.)

- Optionally, you can also transfer employees' time to different Labor Categories.
 - For example, a hospital laboratory tracks time allocated to testing and time allocated to dispensing prescriptions, so they have defined a labor category for each. The lab is short-staffed one day so an employee that usually performs testing is asked to dispense prescriptions. A labor category transfer is performed so that the employee's hours will be tracked to the appropriate labor category on that day. This allows the manager to track how many hours the employee performed testing and how many hours the employee dispensed medications.

Transferring shifts



The screenshot displays the Kronos software interface for managing employee schedules. The main view shows a grid of shifts for various employees. A pop-up window is open over a shift for 'Russel, Beverly' from 3:00 PM to 11:30 PM [8.30H]. A red arrow points from this pop-up to a specific shift bar on the main schedule grid. To the right, an 'Edit Shift' panel is open, showing the shift details and a 'Transfer Employee' button. A red callout box with the text 'Transfer shift / hours' points to the 'Transfer Employee' button.

You can transfer a shift as you add it or edit a shift after it has been scheduled to record the transfer information.

Managing Time-off Requests



When employees submit time-off requests, managers can review, approve, or reject those requests in the Control Center.

Scenario



Michael Martin has reserved some time today to begin building the schedule for the next schedule period.



Michael Martin will navigate to the Scheduling screen for the next schedule period to begin building a future schedule.

Exercise # 6: Navigating to the Next Schedule Period



Navigating to the Next Schedule Period

1. On the **Home** page, click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Expand the **Schedule** section of the main menu.
3. Click the **Current Schedule** link.
4. On the **Current Schedule** screen, click the **Current Schedule Period** link in the top right of the screen.
5. On the **Timeframe** list, select **Next Schedule Period**.
Notice that the employees are sorted from A to Z by default.
6. Click the **Name** column header.
Notice that the employees are now sorted from Z to A.
7. Click the **Name** column heading again to return to the default sort.
8. To return to the home page, click the **Home** icon.

Exercise # 7: Assigning a Schedule Pattern Template



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Assigning a Schedule Pattern Template

1. Click the **checkbox** next to the employee names to select **Kate Spade, Harold Richards,** and **David Reyes**.
2. With your cursor over one of their names, right-click and select **Schedule Pattern**.
3. The **Schedule Pattern** dialog box appears.
4. From the **Pattern Template** drop-down list at the top of the screen, select **Day730 (First Shift 730a)**.
5. For the **Start Date**, click the calendar icon and select the first Sunday in the current schedule period, April 14, 2019 (highlighted in blue).
6. Verify that:
 - The **End Date** is **Forever**.
 - Define Pattern For** is **1 Week(s)**.
 - The **Override Other Patterns** checkbox is selected.
 - Start Pattern On** is set to **Week 1**.
7. Click **Apply**.
8. Click **Save**.

Exercise # 8: Editing, Adding, and Deleting a shift



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Editing, Adding, and Deleting a Shifts

1. Eliza Adams is scheduled until 4:00 PM on Wednesday but needs to stay until 6:00 PM. Edit her shift to change the end time. Double-click Eliza Adam's **Wednesday** shift to open the **Edit Shift** slider.
2. In the final shift segment (12:00 PM to 4:00 PM Regular) (Scroll down until you can see the 12:00 PM to 4:00 PM (Regular) shift segment. Replace the end time with **6:00 PM**. Click **Apply**.
3. Notice that the shift end time has been changed to 6:00 PM on the schedule grid.
4. Click **Save**.
5. Heven Armstrong-Collins will work from 7:00 AM to 12:00 PM on Thursday. Michael will add this shift to the schedule. On **Heven Armstrong-Collins's** row, double-click the **Thursday** column to open the **Add Shift** slider.
6. In the shift segment area of the **Add Shift** slider, click in the **Start Time** field and enter **7a**. Then press **Enter** to continue.
7. When you click or tab out of the **Start Time** field the date field will appear. Ensure that the date is Thursday's date (10/18/2018).
8. In the shift segment area, click in the **End Time** field and enter **12:00 PM**. Then press **Enter** to continue.
9. Click **Apply**.
10. The shift has been added to Heven Armstrong-Collins's schedule for Thursday. Click **Save**.
11. Michael has been told that Howard Edwards will not be needed on Thursday, so he will delete Howard Edwards's scheduled shift on that day. On **Howard Edwards's** row, right-click the **Thursday** column, and then select **Delete**.
12. Click **Save**.

Exercise # 9: Using Quick Actions to Add Paycodes



Using Quick Actions to Add Paycodes

1. Click the **Quick Actions** icon at the top left of the screen to display the Quick Action options.
2. Click the **Paycode** button.
3. From the drop-down list, scroll down and select **Training**.
4. The cursor changes to a black +. Click **Howard Edwards's** scheduled shift on **Monday**, then click **Eliza Adams's** scheduled shift on **Monday**.
5. Notice that their regular hours have been replaced with the Training Hours paycode. Click the **Paycode** Quick Action button again to turn off the function.
6. Click **Save**.

Exercise # 10: Adding a Paycode to Part of a Shift



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Adding a Paycode for Part of a Shift

1. Right-click the shift for **John Adams** in the **Tuesday (4/02)** shift.
2. Click the **Add Paycode** button.
3. Click the **Paycode** drop-down list on the **Add Paycode** slider and scroll down to select **Time Off Duration**.
4. Verify that the **Start Time** is John's regularly scheduled start time (**7:00 AM**).
5. Click the **Duration** drop-down list, select **Half Schedule Day**.
6. Ensure that **Override Shift** is checked and that **Partial Shift** is enabled.
7. Click **Apply**.
8. Notice that the first part of John's shift is now shaded green (for paycode).
9. Click **Save**.

Exercise # 11: Transferring Part of a Shift



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Transferring Part of a Shift

1. Scroll down to locate Harold Richards.
2. Double-click Harold Richards's **Tuesday** shift to open the **Edit Shift** slider.
3. Notice that Harold has three shift segments: regular hours in the morning, a break, and regular hours in the afternoon. For the morning segment, click **Transfer Employee** under that segment.
4. In the **Business Structure** section, click **Select**.
5. In **Locations**, scroll down and click **Metropolitan Plant**.
6. In **Locations**, scroll down and click **Receiving**.
7. In **Jobs**, select the radio button for **Receiving Clerk**.
8. Click **OK**.
9. In the **Business Structure** section of the **Transfer** slider, notice that Harold is now scheduled in the Receiving Clerk job. Click **Apply** to close the Transfer slider and continue.
10. Notice that the Edit Shift slider also shows that Harold is now scheduled as a Receiving Clerk for the morning segment of his shift. Click **Apply**.
11. The double arrows on Harold's shift on the schedule grid indicate a transfer.
12. Click **Save**.

Exercise # 12: Approving Time-Off Requests



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Approving Time-Off Requests

1. Locate the **My Notifications** tile and click **Employee Requests** link.
2. Select Howard Edwards' time-off request.
Note that more information about the request appears in the right-hand Details panel.
Review the **Requested Dates** category to identify the type of time requested as well as the dates and duration of the request.

Click **Accruals** to review Howard's available balance. Review the request details.

3. The actions you can take on this request are at the top of the **Control Center**. Select **Approve**.
4. A **Success** message displays at the top of the **Control Center**. Click the **Home** icon to return to the Home page.

Timekeeping

Timekeeping

In this section, you will be reintroduced to common Timekeeping concepts you learned about in previous training. After that, you'll have an opportunity for hands-on practice to see how to apply those concepts.

Scenario



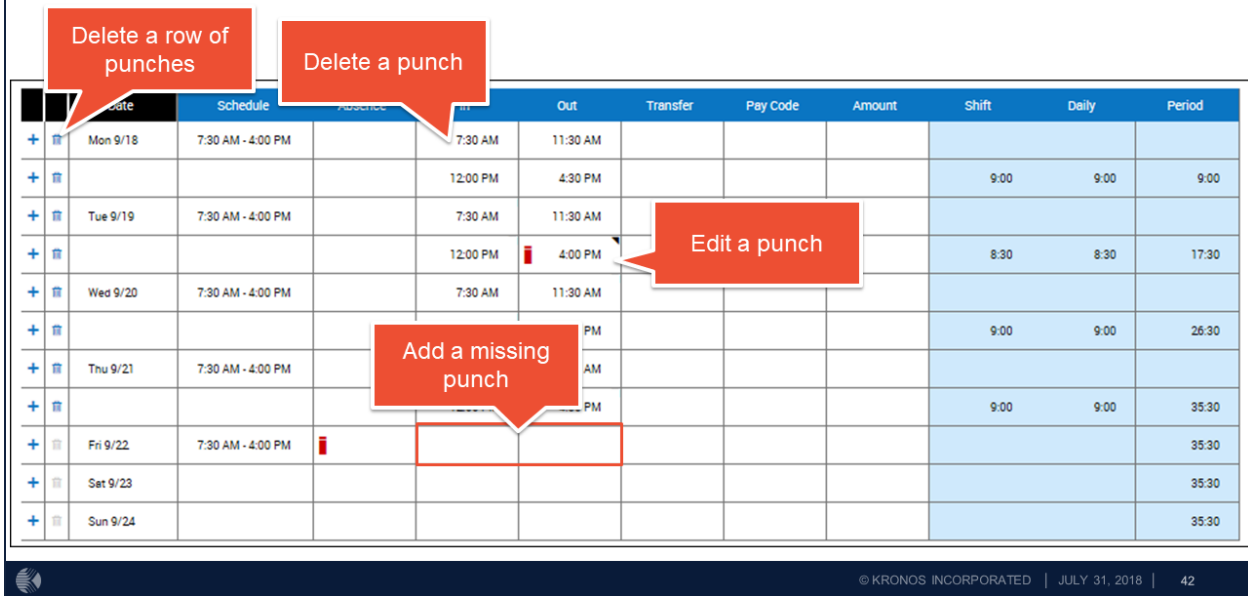
The current pay period is about to close, so along with Michael's day-to-day activities, he is readying timecards for payroll processing.

While performing his daily managerial activities, Michael is also working to ready employee timecards for payroll processing.

Let's review key Department Manager tasks and then apply those concepts during hands-on practice.



Hourly timecards: Adding, editing, and deleting punches



The screenshot shows a timecard grid with columns for Date, Schedule, In, Out, Transfer, Pay Code, Amount, Shift, Daily, and Period. Red callout boxes highlight specific actions: 'Delete a row of punches' points to a row on Mon 9/18; 'Delete a punch' points to a punch on Tue 9/19; 'Edit a punch' points to a punch on Tue 9/19; and 'Add a missing punch' points to an empty cell on Fri 9/22.

	Date	Schedule	In	Out	Transfer	Pay Code	Amount	Shift	Daily	Period
+ [X]	Mon 9/18	7:30 AM - 4:00 PM	7:30 AM	11:30 AM						
+ [X]			12:00 PM	4:30 PM				9:00	9:00	9:00
+ [X]	Tue 9/19	7:30 AM - 4:00 PM	7:30 AM	11:30 AM						
+ [X]			12:00 PM	4:00 PM				8:30	8:30	17:30
+ [X]	Wed 9/20	7:30 AM - 4:00 PM	7:30 AM	11:30 AM						
+ [X]								9:00	9:00	26:30
+ [X]	Thu 9/21	7:30 AM - 4:00 PM								
+ [X]								9:00	9:00	35:30
+ [X]	Fri 9/22	7:30 AM - 4:00 PM								35:30
+ [X]	Sat 9/23									35:30
+ [X]	Sun 9/24									35:30

Michael Martin can:

- Add a missing punch by selecting a cell and entering the applicable time
 - For example, one of Michael's employees forgets to punch out and calls Michael to ask him to add the missing punch.
- Edit an existing punch by selecting a cell and making the applicable edits. Note that when you edit a punch, a black triangle will appear in the cell to indicate an edit was made.
 - For example, Michael edits an out punch when an employee agrees last-minute to return to work for an extra hour.
- Delete a row of data from the timecard by selecting the Delete icon
 - For example, hours were erroneously scheduled on a day the employee does not work and populated a row on that employee's timecard. Michael can delete that row.
- Delete a single punch by selecting the applicable punch and pressing Delete on your keyboard
 - For example, an employee punched out by mistake and then returned to work. Michael can delete that out punch.

Adding and deleting comments

Comments (0)
Punch

Comment On
Punch

select a comment

Type a note (optional)

Add another note

Add

Comments (1)
Punch

Comment On
Punch

Approved

Doc appointment

Add another note

Update

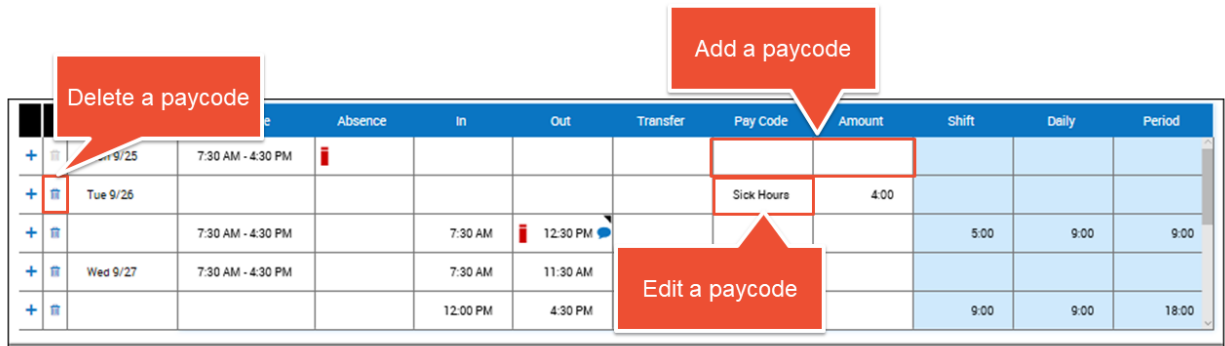
Add a comment and note

Delete a comment or note

	Date	Schedule	Absence	In	Out	Transfer	Pay Code	Amount	Shift
+	Mon 9/11	7:00 AM ..		7:00 AM	4:30 PM				9:30
+	Tue 9/12								
+	Wed 9/13	7:00 AM ..		7:00 AM	5:00 PM				10:00
+	Thu 9/14								
+	Fri 9/15	7:00 AM ..		7:00 AM	5:00 PM				10:00
+	Sat 9/16								
+	Sun 9/17								

It is recommended that any time you edit a timecard, you add a comment in the cell that contains the edit for record-keeping purposes. You can also add comments to exceptions and punches, if appropriate. Comments can be edited and deleted.

Adding, editing, and deleting paycodes



	Date	Shift	Absence	In	Out	Transfer	Pay Code	Amount	Shift	Daily	Period
+ [Delete]	Mon 9/25	7:30 AM - 4:30 PM	[Red bar]								
+ [Delete]	Tue 9/26						Sick Hours	4.00			
+ [Delete]		7:30 AM - 4:30 PM		7:30 AM	12:30 PM				5:00	9:00	9:00
+ [Delete]	Wed 9/27	7:30 AM - 4:30 PM		7:30 AM	11:30 AM						
+ [Delete]				12:00 PM	4:30 PM				9:00	9:00	18:00

Using paycodes, Michael Martin can:

- Add a paycode to establish a different pay type for worked or non-worked hours. (Note: Paycodes cannot be added to a row with punches. If both are needed on the same day, add a row for that day to enter the paycode information.)
 - For example, a Sick paycode indicates that the employee was sick during their shift and was unable to work for the defined amount of hours.
- Edit an existing paycode by selecting and updating the existing paycode using the Paycode drop-down list
- Delete a row with a paycode by selecting the Delete icon

Working with Exceptions

	Date	Schedule	Absence	In	Out	Transfer	Pay Code	Amount	Shift
+	Mon 9/11	7:00 AM - 5:00 PM		7:00 AM	12:00 PM				
+				12:30 PM	5:00 PM				10:00
+	Tue 9/12								
+	Wed 9/13	7:00 AM - 5:00 PM		7:00 AM	12:00 PM				
+				12:30 PM	4:30 PM				9:30
+	Thu 9/14								

To resolve an exception, you can..

Mark the exception as reviewed and add a comment.

Edit the punch and add a comment.

Add or delete a pay code

Exceptions are generated in timecards when there is a deviation from the employee's scheduled hours. For example, if an employee is scheduled to work from 7:00 AM to 5:00 PM, but leaves work at 4:30 PM, an exception may be generated.

As exceptions appear in employee timecards, a manager may be expected to resolve those exceptions by marking the exceptions as reviewed, editing the punch, or adding or editing a paycode.

Performing transfers

The screenshot shows the Kronos Employee Timecards interface for employee Adams, Gail. The table displays timecard data for the period from Mon 9/11 to Thu 9/14. A red callout box labeled "Transfer hours" points to the Transfer column for Mon 9/11, which is currently empty. The table includes columns for Date, Schedule, Absence, In, Out, Transfer, and Shift. The Shift column shows 10:00 for Mon 9/11 and 9:30 for Thu 9/14. The interface also includes navigation and action buttons at the top.

	Date	Schedule	Absence	In	Out	Transfer	Shift
+	Mon 9/11	7:00 AM - 5:00 PM		7:00 AM	12:00 PM		
+				12:30 PM	5:00 PM		10:00
+	Tue 9/12						
+	Wed 9/13	7:00 AM - 5:00 PM		7:00 AM	12:00 PM		
+				12:30 PM	4:30 PM		9:30
+	Thu 9/14						

Accruals Totals

As you learned earlier, managers can transfer employee hours to a different part of the business structure or to a different cost center, work rule, or labor category.

Reports

Location Schedule - Weekly

Time Period :
Query : Next Schedule Period
Machine Shop
Executed On :
Printed For : 4/27/2018 8:43 AM
Michael Martin

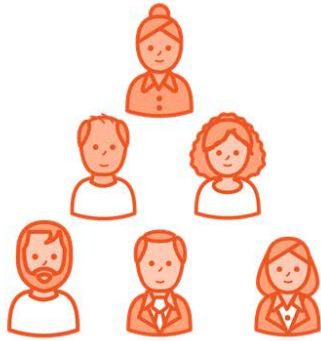
Organization/United States/Metropolitan Plant/Machine Shop

Employee	Job	Sun 04/29/18	Mon 04/30/18	Tue 05/01/18	Wed 05/02/18	Thu 05/03/18	Fri 05/04/18
Adams, Eliza	Apprentice Welder	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM
		12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM
Adams, Gail	Apprentice Welder	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM
		12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM
Adams, Gary	Apprentice Welder	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM
		12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM
Adams, George	Apprentice Welder	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM
		12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM
Adams, John	Apprentice Welder	7:00AM - 11:00AM	7:00AM - 11:00AM	7:00AM - 11:00AM	7:00AM - 11:00AM	7:00AM - 11:00AM	7:00AM - 11:00AM
		11:30AM - 5:00PM	11:30AM - 5:00PM	11:30AM - 5:00PM	11:30AM - 5:00PM	11:30AM - 5:00PM	11:30AM - 5:00PM
Adams, Laura	Apprentice Welder	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM
		12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM
Adams, Molly	Apprentice Welder	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM
		12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM
Adams, Olivia	Apprentice Welder	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM	7:30AM - 11:30AM
		12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM	12:00PM - 4:00PM

Depending on their access, managers can run several reports that provide them with important information that helps them monitor schedules and other manager tasks. For example, managers can run the Location Schedule – Weekly report to view and/or print a schedule.

Access the Report Library to see the reports that are available to you.

Approving Timecards



Group approval



Single approval



When approving timecards, managers can approve timecards for groups of employees, or approve one timecard.

Exercise # 13: Adding Punches and Comments to an Employee's Timecard



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Adding Punches and Comments to an Employee's Timecard

1. Click the **Main Menu** icon in the top left of the screen to open the **Main Menu**.
2. Click to expand the **Time** section of the main menu and select **Employee Timecards**.
3. On the **Employee Timecards** page, validate that you are viewing data for the **Previous Pay Period**. If necessary, click the timeframe drop-down in the top right corner to change the time period.
TIP: You can sort the employee name column by clicking on the **Employee Full Name** column header.
4. Single-click **Eliza Adams's name**. (Alternatively, click the checkbox next to Eliza's name and click the **Open Selected** button.)
5. Locate **Friday's** date within the timecard and click the **Out** cell with the missing punch (red block)
6. Type **4p** and then press **Enter** to continue.
7. Click **Save**.
8. Right-click the updated Friday **Out** cell and select **Comments**.
9. Click the **Select a Comment** drop-down list and scroll down to select **Employee Forgot to Punch In-Out**.
10. You can attach additional, optional free-form notes in the **Type a note** field. Click **Apply**.
11. Review your edits. Validate that the **Comment** icon is displayed in the edited cell. Note that there is a black triangle in the edited cell. This indicates that the cell has been edited. Click **Save**.

[Continued on following page]

12. To review a line item break down of the employee's total hours for the selected time period, click the **Totals** add-on at the bottom of the timecard.
13. The employee's hours are broken down by location/job and by pay code for the selected time period.
Note: **Wages** only display if you have access rights to view wages.
To view a totals breakdown for a selected day, click the first **All** field in the Totals pane and select **Daily**.
14. The hours are displayed for the selected day.
To close the **Totals** add-on, click the close (X) button in the upper right of the **Totals** pane.

Exercise # 14: Adding a Pay Code to Excuse an Absence



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Adding a Pay Code to Excuse an Absence

1. In the timecard, verify that the **Timeframe** is the **Current Pay Period** and locate **Wednesday's** date within the timecard. Notice the read absence indicator in the **Absence** column. You can review the employee's accrual balances prior to adding a pay code. Click the **Accruals** add-on link at the bottom of the timecard.
2. The employee's available accrual balances display for the selected time period. To close the Accruals add-on, click the close (X) button in the upper right of the Accruals pane.
3. Click the **Pay Code** cell on the **Wednesday** row, and from the drop-down list, select **Sick**.
4. Click the **Amount** cell.
5. If available, you can select a pre-defined duration such as the full scheduled day or half scheduled day. You can also enter your own amount of hours. Type **8** in the cell and then press **Enter** to continue.
6. Click **Save**.
7. Right-click the **Amount** cell and select **Comments**.
8. From the **Select a Comment** drop-down, scroll down and select **Employee Illness**.
9. Click in the **Notes** section and type **sick with flu**. Then press **Enter** to continue.
10. Click **Apply**.
11. Review your edits. Validate that the **Comment** icon is displayed in the edited cell. Click **Save**.
12. To review a line item break down of the employee's total hours for the selected time period, click the **Totals** add-on at the bottom of the timecard.

[Continued on following page]

13. The employee's hours are broken down by location/job and by pay code for the selected time period.

Note: **Wages** only display if you have access rights to view wages.

To view a totals breakdown for a selected day, click the first **All** field in the Totals pane and select **Daily**.

14. The hours are displayed for the selected day.

To close the **Totals** add-on, click the close (X) button in the upper right of the **Totals** pane.

15. Click the **Home** icon to return to the Home page.

Exercise # 15: Marking an Exception as Reviewed



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Marking an Exception as Reviewed

1. In the timecard, verify that the **Timeframe** is the **Previous Pay Period** and locate **Friday's** date within the timecard. Notice the **6:30 AM** red exception indicator. Hover over the exception; notice that an "**Early in**" exception was generated. Right-click the In punch cell with the exception.
2. Select **Comments**.
3. Click the **Comment On** drop-down and select the item to which you want to attach the comment (**Punch**).
4. Click the **Select a Comment** drop-down and select **Approved**.
5. You can attach additional, optional free-from notes. Click in the **Type a Note** section, enter: "**covering shift**". Then press **Enter** to continue.
6. Click **Apply**.
7. Click **Save**.
8. Right-click the In punch cell with the exception.
9. Select **Mark as Reviewed**.
10. Notice the exception changes from red to green. Click **Save**.

Exercise # 16: Performing a Timecard Transfer



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Performing a Timecard Transfer

1. On the **Employee Timecards** page, click the Timeframe drop-down in the top right corner to change the time period to **Current Pay Period**.
2. Scroll down and select **Current Pay Period**.
3. Single-click **Molly Adams's** name.
4. In the row for Wednesday's date, click the + sign on the left to add a row.
5. On the new row for Wednesday, click the **In** punch and type **8a**. Press **Enter** to continue.
6. Click in the **Out** cell and type **1130a** and then press **Enter** to continue.
7. Click in the **Transfer** cell.
8. Click the drop-down arrow and select **Search**.
9. In the **Transfer** dialog box, locate **Business Structure** and click **Select**.
10. In the **Locations** section, scroll down and select **Shipping**.
11. Select the radio button next to **Data Entry Clerk**.
12. Select **OK**
13. Click **Apply**.
14. Note that the transfer information is displayed in the Transfer column. Verify the transfer before saving by clicking **Calculate Totals**.
15. Click **Totals** to verify that Molly's hours are allocated to the correct location and job.
16. In the Totals, (x) indications transfers.
17. Click **Save**.

Exercise # 17: Running Reports



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Running Reports

1. Click the **Main Menu** icon in the top left of the screen to open the main menu.
 2. Click to expand the **Dataviews & Reports** section of the main menu and select **Report Library**.
 3. Click **Run Report**.
 4. In the **Select Report** panel, select **Timekeeping**.
 5. Click **Exceptions**.
 6. Click **Select**.
 7. Click the **Timeframe** calendar icon and select the **Current Pay Period**.
 8. Click the **HyperFind** to **All Home** to include all of Michael's employees in the report.
 9. Click the **More** icon (...) for the **Exceptions** Types field and click the **Select All** checkbox to include all exceptions in the report.
 10. Click **Apply**.
 11. Keep the default value of PDF for the Output Format. Click **Run Report**.
 12. A panel opens and displays that the report is running...
 13. A message then displays indicating the report is completed. Click **OK** on the message screen.
 14. To open the report, select the **Open With** options and click **OK**.
 15. The PDF report opens in the **Adobe Acrobat** application. Use the application's options to save or print the report. Click to **Close (X)** button for the **Adobe Acrobat** window or tab.
- The report remains in the **Completed** category. Click the completed report to open the report details panel.

Exercise # 18: Approving Employee Timecards (Group)



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Approving Employee Timecards (Group)

1. Click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Click to expand the **Time** section of the main menu and select **Employee Timecards** dataview.
3. Verify that you are reviewing timecards for the **Previous Pay Period** and select the checkboxes for the employees you would like to approve
 Tip: sort the employee name column by clicking on time on the **Employee Full Name** column header.
 For this example, to select all displayed employees, click **Select All**.
4. Click **Approve**.
5. In the **Approve Timecard** window, select **Yes**.
6. You can navigate to one of the employee's timecard to see the color change that indicates approval.
 Click **Eliza Adams's** name.
7. Note that the employee's timecard has changed color to indicate that it has been approved.
 To verify that the approval process has been completed for the all timecards and that all approvals were successful, open the main menu by clicking the **Main Menu** icon.
8. Click to expand the **Dataviews & Reports** section of the main menu and select **Group Edit Results**.
9. Group edits that have not yet completed are listed in the **Group By** column as **Processing**.
 Click the **Processing** category to expand the entry.

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10. Your **Approved** group edit action is listed with a count of failed, successful and total records approved. To update the status, click the **Refresh** icon next to the **Loaded** time.
11. When the group edit is finished, it will display under a **Completed** category under the **Grouped By** column. Click the **Completed** category to expand the entry.
12. If any approval failed, it will be listed in the **Group Edit Failure** column. To view the failed records, click the failed count (**2**).
13. Review the failure reasons. In this case, the failures require no further actions. Click **Done**.
14. Click the **Home** icon to return to the Home page.

Exercise # 19: Approving Individual Timecards



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Approving an Individual Timecard

1. Click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Click to expand the **Time** section of the main menu and select **Employee Timecards**.
3. On the **Employee Timecards** page, validate that you are reviewing data for the **Previous Pay Period**. If necessary, click the timeframe drop-down in the top right corner to change the time period. Click **Eliza Adams's** name.
4. In the timecard, verify that the **Timeframe** is the **Previous Pay Period**. To review a line item break down of the employee's total hours, for the selected time period before approving, click the **Totals** add-on at the bottom of the timecard.
5. The employee's hours are broken down by location/job and by pay code for the selected time period.
Note: **Wages** only display if you have access rights to view wages.
To close the **Totals** add-on, click the close (X) button in the upper right of the **Totals** pane.
6. Select **Approve**.
7. An approve message displays, and the color of the timecard changes to indicate that it has been approved by a manager.
Note: If you need to remove the approval, for example because the timeframe is incorrect, use the **Remove Approval** option.
8. Notice that the background color of the timecard has changed to indicate that a manager has approved it. Click the **Home** icon to return to the Home page.



Thank you for attending!