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USING WORKFORCE TIMEKEEPER

Logging In

Open your web browser and go to the following sites. Kronos was tested using Chrome and all screenshots are from that browser. Other browsers like Firefox and Safari may also work.

Test System: We will use the Test system during Training and Testing time

http://workforce-test.union.edu/wfc/navigator/logon

Production System: This is the system that will be used after the department goes live

http://workforce.union.edu/wfc/navigator/logon

Login: Use your Union College username and password

*****First Time Access*****

1) In Chrome on the first visit to the site you may need to click "Get Flash" on an opening screen

2) Next, click "Allow"

3) Login using your Union College username and password
Using the Navigator

Navigator Layout

After logging on, you will see the initial NGUI screen. Note that your company’s setup may vary from what is shown in this manual. The example below shows the “Exceptions” widget in the middle, with additional widgets such as Genies, Quick Links, Time Off Requests, Schedules, etc., on either side. During your implementation, you will be able to review your options and modify your own Workspaces.

The middle widget is the active widget that you can work in; the widgets on the sides are the inactive widgets. You can make an inactive widget active by clicking on its title bar and dragging it into the center of the screen. You cannot move a widget from the center of the Navigator out; you must move another widget to the center, which will move the widget that was in the center to one of the side positions.
You can also click on the gear icon at the top right of an inactive widget and select **Pop-out** to make it active. Click **Close** to close the widget which will place it in the drawer on the right side of the screen for future use.

To expand the middle widget, click the Maximize icon.

When a widget is maximized, click the Maximize button to Restore Down to normal size.

To expand or shrink the widgets on the left and right sides of the active widget, click and drag the resize bar between widgets.
Widgets that have been closed can be accessed via the drawer, which is on the right side of the screen. The Navigator can have a maximum of seven widgets open at once, so any other widgets will be found in the drawer. Click the arrow in the upper right corner to expand the Drawer to see the names of the widgets, or simply hover your mouse over a widget icon to see the label.

The drawer contains all available widgets; the widgets currently displayed in the Navigator will be gray, while the widgets stored in the drawer will be white. To move a white widget out of the drawer, click and drag it to the left or right side of the Navigator. Simply clicking on a widget in the drawer will open it as the Active widget and will create a new tab on the Workspace line. Clicking the X in the tab will close the widget and restore the previous Workspace.
Alerts

Alerts are found at the top middle of the page. The most common alerts are Exceptions and Time Off Requests. Each alert has a severity associated with it. Low severity alerts will have a blue balloon icon, medium severity alerts will have an orange exclamation point in a triangle, and high severity alerts will have a red exclamation point in a circle. Clicking on an Alert will open a separate window where you can drill down to the Exception or Request detail so that you can correct or act on the Alert.

Additional Workspaces can be accessed via the “Workspaces” tab at the top right of the page. Clicking this tab will allow you to scroll through your available Workspaces. Click on a Workspace to open it. For example, clicking the “Help” Workspace will open it as the Active window in the middle of the screen.

Once opened, Workspaces will appear as separate tabs, allowing you to switch from one workspace to another easily. You can Refresh or Close it by clicking the buttons on the applicable tab.
Using Help

Online help is available by clicking the Help workspace from within the Navigator which will launch the Workforce Timekeeper Help site map, from which you can select a specific topic or click Index to search for your topic.

The Exceptions Widget

The “Exceptions” widget is used to review timecards by types of exceptions and can also be used to correct exceptions. You can correct missing punches, mark as reviewed, add pay codes, add comments, etc., in this widget.

Double click an employee’s name to see the Exception detail, or select multiple employees using Ctrl/click to highlight the appropriate employees or Shift/click to select all employees, then click the View Details link at the bottom of the Name column.
You can also sort the columns simply by clicking on the headings to bring employees with exceptions to your attention.

You can also select employees by exception type by hovering your mouse over the exception column (ex: Punches) and clicking on the Details link which will appear above the column.
View of Detail when a single employee is selected:

**Note:** only days on which exceptions occur will be displayed. To see the entire pay period, click the **View Timecard** button.

View of Detail when multiple employees are selected:

To return to the Exceptions widget, click the button.
Correcting a Missed Punch

To add a missing punch, double click the red box as shown above and key in the appropriate time using either AM/PM mode or military time.

Alternatively, you can click the “Add Punch” button (shown at the bottom of the screenshot on the previous page), and complete the “Add Punch” dialog box.

Editing Punches

Single click on a punch exception to activate the editing functions at the bottom of the screen: Mark as Reviewed, Comment, Add Punch, or Remove a punch.

Mark as Reviewed does not impact how the employee is paid, it simply changes the color of the exception from red to green as a visual cue to the manager that the exception has been addressed. Once a punch has been Marked as Reviewed, the function button changes to Unmark as Reviewed, which will change the color of the punch back to red.

Note: In the Exceptions widget, exceptions are displayed as red or green punch times. In Timecards, a red or green indicator in the punch cell will designate whether the exception is marked or not.
Adding Comments

Comments can be added to punches or pay code amounts.

To add a comment to a punch:

1. Single click the punch, then click the **Comment** button at the bottom of the window.
2. Select one or more comments by clicking the check box next to the appropriate comment(s).
3. Once a comment is selected, if you have the access rights to add notes you can do so by clicking the green + sign. Free text notes can be up to 250 characters long.

To add a comment to a Pay Code:

1. Single click the Pay Code **Amount**.
2. Click the **Comment** button at the bottom of the window.
3. Select the Comment(s) from the list, and optionally add a free-text note by clicking the green + sign next to the comment.
**Adding Pay Codes**

In the example above, Wednesday is shown as an absent day. Employees are classified as absent if they have a schedule in Kronos and there are no associated punches on the timecard.

To address the absent day, a manager would add a non-productive pay code to the timecard by clicking the green + sign in the Pay Code field, selecting the appropriate code in the “Pay Code Edit” dialog box as seen below, and then entering the number of hours in the Amount field or Full Sched Day or Half Sched Day.
WORKFORCE TIMEKEEPER GENIES

About Workforce Timekeeper Genies

Workforce Genies are a key component of the system, offering several advantages to managers including:

- The ability to view information such as hours, exceptions, and schedules for all employees on one screen
- Perform Group Edits on all, one, or a selected group of employees
- Select a specific employee or employees to view or edit detailed information such as timecards, punches, or scheduled shifts

Genies which are available for your use will be listed in the Genie widget which will be located in the Workspace or in one of the Drawers on the right side of the Navigator. Genies can be customized by your Kronos System Administrator to display specific information and default to specific employees and a selected time period.
### Types of Genies

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Detail Genie</strong></td>
<td>Displays time and attendance information for individual employees. Detail Genies are the starting point for viewing and editing timecards and People records, as well as running reports.</td>
</tr>
<tr>
<td><strong>Roll-up Genie</strong></td>
<td>Displays summary information by labor level. Ex: Department</td>
</tr>
<tr>
<td><strong>Schedule Genie</strong></td>
<td>Displays schedule information for individual employees and groups. Schedule Genies are the starting point for editing employee schedules.</td>
</tr>
<tr>
<td><strong>Calendar Genies</strong></td>
<td>Displays past and future events for employees in a calendar format with a legend to describe specific events.</td>
</tr>
</tbody>
</table>
Using Genies

When the Genie widget is moved to the center of the Navigator, the default genie (first one in the list) will be displayed. You can select other genies from the drop-down list in the upper left corner of the widget.

The header displays the functions which can be performed in a genie, as well as drop-down selection options for **Time Period** and **HyperFind Queries** in the upper right corner.
Selecting and Sorting Columns in Genies

You can select which columns are visible in the genie by clicking the **Column Selection** icon in the genie header and unchecking any columns in the dialog box that you do not want to see. Restore hidden columns by clicking the Column Selection icon and clicking the box next to the column.

To sort the information in a Genie column in ascending order, click the column heading once. Click again to sort in descending order.

For example, to sort all employees with missing punches, simply click twice on the column label for **Missed Punches** to sort in descending order. All employees with missing punches will now be grouped together at the top of the Genie. Most genies are sorted by Name by default, so clicking the **Name** column will return to the original sort.

Selecting Employees

You must select employees in the Exceptions widget or a Genie before you can access their timecards, People records, schedules, or reports.

To select all employees, click the **Select All Rows** icon in the header. This will highlight all employees in the Genie.

To select multiple employees, click and drag if the employee names are next to one another or use Ctrl/click to select non-contiguous employees.

To select a specific employee, simply click the name to highlight it.

For example: to select employees with missing punches, hold the Ctrl key down while clicking on employees who have a check mark (✔) in the **Missed Punch** column.
Applying Workforce Functions to Selected Employees

Once you've selected your employees, click the **Go To** icon on the right side of the genie header, then click the appropriate selection: **Timecards, Schedules, People Editor, Reports**, etc., in the Go To dialog box.
USING TIMECARDS

As a manager, you can review, edit, or approve the timecards of the people who report to you. You can select one timecard or many timecards at the same time.

To open a timecard for a single employee from a Genie, double click the employee's name. To open multiple employee timecards, follow the steps for Selecting Employees on page 19, then click Go To > Timecards, as described on the previous page. The timecard(s) will load for the same time period that was selected for the Genie from which the employee(s) were selected. Once the timecard appears, you can change the timeframe by clicking the displayed Time Period (ex: Previous Pay Period), then click the down arrow and select one of the pre-defined intervals, or click the icon and select a Start and End date range.

Then click Apply.
Types of Timecards

There are two timecard formats available for use in WFC:

**Hourly View Timecard** – Displays employee punches as received from data collection devices or as entered directly into the timesheet by a manager or employee.

<table>
<thead>
<tr>
<th>Date</th>
<th>In</th>
<th>Out</th>
<th>Transfer</th>
<th>Pay Code</th>
<th>Amount</th>
<th>Schedule</th>
<th>Shift</th>
<th>Daily</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun 8/28</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mon 8/24</td>
<td>8:00AM</td>
<td>4:30PM</td>
<td></td>
<td></td>
<td>8:00AM-4:30PM</td>
<td>8.0</td>
<td>8.0</td>
<td></td>
</tr>
<tr>
<td>Tue 8/25</td>
<td>8:15A</td>
<td>4:30PM</td>
<td></td>
<td></td>
<td>8:00AM-4:30PM</td>
<td>7.75</td>
<td>7.75</td>
<td></td>
</tr>
</tbody>
</table>

**Project View Timecard** – Displays durations of time. The Project View Timecard is generally used by salaried or exempt employees who charge time to various projects or departments.

Saving and Calculating Timecard Totals

One of the characteristics of web-based programs is that work is performed on a local PC, and the database is not updated and totals are not calculated until the work is saved. When you make changes to a timecard, the effect of those changes may not be visible until you **Save** the changes or **Calculate Totals**.

**Saving Changes**

As soon as you make a change to a timecard, the Calculate Totals and Save icons in the Timecard header will change from grayed-out to a color to indicate that you have unsaved changes in the timecard. The color will depend on which theme your Kronos system is using. In the basic theme that most companies use, the color will be orange. Clicking the **Save** button will save your changes to the database and update the screen with new totals. The **Calculate Totals** and **Save** icons will revert to grayed-out.
Calculating Totals

There may be times when you want to see the effects of timecard edits before saving them. Once you’ve performed the edits, clicking **Calculate Totals** will update the timecard totals based on your changes. The Calculate Totals icon will be grayed-out, but the **Save** icon will remain active (colored) indicating that you have not yet saved the changes.

Refreshing

Every screen in Workforce Timekeeper has a “Refresh” button, which is usually located in the header. Clicking Refresh will restore the information to the screen as of the last time it was saved to the database. If you have not saved your changes before clicking Refresh, the system will prompt you with a warning message and allow you to save before refreshing.

Common Timecard Tasks

Adding Missing Punches

If the employee has a schedule, the missed punch indicator (red cell) will be displayed in the cell where the punch is missing.

**To fix the missing punch:**

1. Click on the solid red cell (one click).
2. Enter the time using the keyboard. Ex: 3:00pm = 3p.
3. Press the Enter or Tab key.
4. Save.

If there are more than two punches on a day and one of the punches is missing, insert a blank row for that day by clicking the Insert Row icon (➕) at the left side of the timecard. Enter the missing punch on the blank row in the applicable In or Out column, then **Save**.

**Note:** If the employee does not have a schedule, determine what day contains the missing punch, add a blank row for that day, and enter the missing punch on the blank row.
Tips for entering time:

- When adding or editing punches, you may use either 12 hour (standard) or 24 hour (military) time format, e.g. 3:00pm can be entered as either 3p or 15.

- When entering punches, the system defaults to 24 hour time. When entering time in 12 hour format, add a “p” to all punches after 12pm. For example, to enter a time of 7:00am, simply hit the “7” key and then hit Enter. To enter 1:00pm, type 1p or 13, then hit Enter.

- You do not need to type the colon that separates hours and minutes. Ex: 3:30pm can be entered as 330p or 1530.

Editing Punches

To change a punch time:

1. Double click on the punch to be edited.
2. Type the new time from the keyboard.
3. Press Enter or Tab.
4. Save.

To change an existing punch:

1. Right click the punch.
2. Click the Edit icon in the Punch Actions dialog box.
3. Select the appropriate field. You can change the punch Time, Override the punch a, e.g. “New Shift”, or Cancel a Deduction, such as a meal.
4. Click OK, then Save.
To Add a Comment to a punch:

1. Right click the punch.
2. Click **Comments** in the Punch Actions dialog box.
3. Select your comment(s) by checking the box to the left and adding a note if desired.
4. Click **OK**, then **Save**.

A comment indicator (💬) will now appear in the cell you have just edited. Comments and notes can be viewed by hovering your mouse over the Comment indicator in the cell.

**Note:** Pre-defined comments can be added to the selection list by your Kronos System Administrator.
**Timecard Indicators and Colors**

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Solid Red Cell" /></td>
<td>A solid red cell indicates a missing punch. Positioning the mouse over the red box will display the words “Missed Punch.”</td>
</tr>
<tr>
<td><img src="image" alt="Red Cell" /></td>
<td>A red punch or in a cell indicates an exception, such as a late or early punch, or an Unexcused Absence. Positioning the mouse over the cell will tell you what the exception is.</td>
</tr>
<tr>
<td><img src="image" alt="Green Cell" /></td>
<td>A Green punch or green vertical hash marks in a cell indicate an exception (previously marked as i) has been Marked as Reviewed.</td>
</tr>
<tr>
<td><img src="image" alt="Blue Date" /></td>
<td>A Blue date or blue vertical hash marks in a date cell indicates an Absence has been Excused.</td>
</tr>
<tr>
<td><img src="image" alt="Small Blue Dialog" /></td>
<td>A small blue dialog balloon in a cell indicates a comment has been attached to that cell. Hover your mouse over the balloon to view the comment. If there is a free-text note attached to the Comment, it will appear in parentheses after the Comment.</td>
</tr>
<tr>
<td><img src="image" alt="Account" /></td>
<td>An “(x)” before a labor account in the “Totals” section indicates that the account is not the Home labor account.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account</th>
<th>101/202/301/401/501</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(x)101/202/301/407/...</td>
</tr>
</tbody>
</table>
**Entering Hours in an Hourly View Timecard**

To enter hours in an Hourly View timecard (also known as a pay code edit):

1. Double click the *Pay Code* column for the appropriate day.
2. Select the correct pay code from the list, e.g. “Vacation.”
3. Press the Tab key; the cursor will move to *Amount*.
4. Enter the number of hours to be added, e.g. “8.0.”
5. Save.

**Tips for entering hours in the timecard:**

- You may enter the time in hours-minutes or hours-decimals. For example, seven and a half hours can be entered as “7:30” or “7.5.”
- You cannot enter hours on a line that contains punches. To add hours on a day that contains punches, click the Insert Row icon (➕) on the left side of the timecard for the date you’re working on and enter the hours on the blank line.

**Entering Hours in a Project View Timecard**

Because Project View timecards do not contain punches, hours are entered as durations.

To enter hours in a Project View timecard:

1. Click the *Pay Code* column and select the appropriate pay code. The default pay code for the Project View timecard is “Hours Worked.”
2. Click the cell under each day on the pay code line and enter the appropriate hours for each day.
3. To add different pay codes or assign hours to a different labor level, click the Insert Row icon (➕) on the left side of the timecard and select the appropriate pay code and/or Labor Account.

**Note:** Both the Hourly and Project View timecards can be pre-populated for certain employees such as Salaried or Professional. This is known as exception editing; the timecard is edited only when the employee works something other than his/her normal schedule.
Transferring Hours in a Timecard

If an employee works in more than one department or job, his hours can be allocated to the Non-home department(s) by performing the transfer at the time clock or through the browser. If the supervisor is performing the transfer in the timecard, the system will remember previous transfers that the manager performed so a repeat labor level assignment can be easily selected from the transfer pick list.

To transfer all hours in a shift to another labor level:

1. Double click the Transfer column for the day on which the transfer occurred.

2. Select the correct labor account from the displayed pick list or click Search and select the appropriate labor level(s) and entry(s) in the Transfer dialog box. Note that the Transfer dialog box defaults to Labor Account transfers. Work Rule transfers, which will be explained later, can also be done from this dialog box.

3. Click OK.

4. Click Save or Calculate Totals to see the result of the transfer.

Note: The number of previous transfers the system keeps in the pick list is controlled by your Kronos System Administrator. By default, the most recent five transfers are displayed.
To transfer a portion of a shift to another labor level, insert a punch at the point where the transfer occurred:

1. Click on the left to insert a blank line on the appropriate day.
2. Double click the **In** punch cell on the inserted line.
3. Enter the time the employee started work in the other labor level.
4. Press the **Tab** key on your keyboard.
5. Double click the **Transfer** column cell for that day.
6. Select the correct labor account from the displayed pick list or click **Search** and select the appropriate labor level(s) and entry(s) in the **Transfer** window.
7. Click **OK**.
8. Click **Save** or **Calculate Totals** to see the result of the transfer.

<table>
<thead>
<tr>
<th>Date</th>
<th>In</th>
<th>Out</th>
<th>Transfer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun 8...</td>
<td>7:00AM</td>
<td>3:30PM</td>
<td></td>
</tr>
<tr>
<td>Mon 8...</td>
<td>7:00AM</td>
<td>3:34PM</td>
<td></td>
</tr>
<tr>
<td>Tue 8...</td>
<td>7:00AM</td>
<td>3:30PM</td>
<td></td>
</tr>
<tr>
<td>Wed 8...</td>
<td>7:00AM</td>
<td>3:30PM</td>
<td></td>
</tr>
<tr>
<td>Thu 8...</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 8/28</td>
<td>7:00AM</td>
<td>10:00AM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10:00...</td>
<td>3:30PM</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>/202/302/205///,non-exempt</td>
</tr>
<tr>
<td>Sat 8...</td>
<td>7:00AM</td>
<td>3:30PM</td>
<td></td>
</tr>
</tbody>
</table>
Work Rule Transfers

When performing either of the transfers described above, if the employee’s Work rule changes when working in a Non-home labor account, click the Work Rule option in the Transfer dialog box and select the appropriate Work Rule from the list.

Transferred Hours Displayed in Totals section

Transferred hours are denoted in the Totals section of the timecard with “(x)” preceding the labor account.

<table>
<thead>
<tr>
<th>Account</th>
<th>Pay Code</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>100/300/501/13/0000/0000/20</td>
<td>RE61</td>
<td>25.5</td>
</tr>
<tr>
<td>100/300/501/13/0000/0000/20</td>
<td>RE62</td>
<td>1.5</td>
</tr>
<tr>
<td>(x)100/202/302/205/0000/0000/20</td>
<td>Regular</td>
<td>5.0</td>
</tr>
</tbody>
</table>
Moving Hours

Sometimes it may be necessary to move hours from one pay code to another or from one labor account to another. The “Move Hours” function may be used in situations like this.

To move hours:

1. Right click the pay code in the Totals section that you want to move hours from.
2. In the Totals Actions window, click Move Amount
3. In the Move Hours window, select the pay code that you are moving hours to.
4. Enter the number of hours to be moved in the Amount box.
5. Select the correct Effective Date.
6. If applicable, select the Labor Account the hours are being charged to.
7. Click OK.

Note: The hours being moved must be associated with the correct Effective Date, otherwise you may wind up with negative hours being displayed in the “Totals” section.
Viewing Hours for Specific Days

To view hours calculated for a specific day or days, click the arrow in the box just below the Totals tab:

Select Daily, then click on a date in the timecard. The totals in the “Totals” section will display the hours for the selected day as they will be paid. When Shift is selected, hours as calculated from punches will appear in the Totals section for the selected day. When Period to Date is selected, the totals in the Totals section will be cumulative through the day that is selected. To return to the pay period totals, click All.

Approving and Signing Off Timecards

Timecards can be approved or signed off from either a Detail Genie or from the timecard. The only difference is that multiple timecards can be approved or signed off from a Genie, whereas the approval or Sign-Off from a timecard is only for that specific employee. The ability to perform an approval or Sign-Off is based on your company’s policies and your access rights. If you have questions about the approval and/or Sign-Off policy in your company, see your Kronos system administrator.
Approvals

There are two levels of approval in Workforce Timekeeper, Employee Approval and Manager Approval. Your company may choose to use both, one, or neither. Approvals serve as a documentation and communication device for indicating that a timecard has been reviewed by the employee or manager.

Important facts about approvals:

- Approvals can be done any time before the timecard is signed off. This means approvals can be done while still in the current pay period.

- An Employee Approval locks the timecard from any further edits by the employee. Depending on your system configuration, employees may or may not be allowed to remove their approval which will unlock the timecard and allows further editing by the employee. Supervisors and/or managers can still edit the employee’s timecard after an Employee Approval.

- A Manager Approval locks the timecard from any further edits by the employee. Depending on how your system is configured, supervisors/managers may still edit timecards after a Manager Approval has been applied, or the timecard can be locked from further edits unless the approval is removed.

- When a timecard has been approved by either the employee or manager, the background color of the timecard will change. Clicking the Go To button and selecting Audits, will display when the approval or Sign-Off was performed and who performed it.

- An approval can be removed if you have been given this privilege in your Access Profile. Approvals can only be removed by the person who originally performed the approval.
Performing an approval while viewing the timecard:

1. Click the Approvals menu tab in the header.
2. Click the Approve Timecard option.
3. Click the Go To button, click Audits > Type of Edit = Approvals/Sign-offs to see who performed the approval and when.

Approving timecards in a Detail Genie, e.g. Pay Period Close:

1. Select the employee(s) whose timecards you are going to approve. If approving all employees click Select All Rows.
2. Click the Approvals menu tab in the header.
3. Click the Approve Timecard option.
4. Click Yes when the system asks if you want to approve the timecards.
5. Click the Refresh button in the header. The Manager Approval column in the Genie will contain a numeric value signifying the number of approvals for the timecard and the name of the person(s) who approved the timecard will appear in the Approved By column.
Sign-Off

Sign-Off differs from approval in that there is only one Sign-Off per employee per pay period. The Sign-Off function can be done from either a Genie (multiple Sign-Offs) or from the timecard (single Sign-Off) and is performed the same way as approvals (see above).

Important facts about Sign-Off:

- Sign-Off can only be done for the previous pay period. For example, a pay period that ends at Saturday midnight can only be signed off on Sunday (the first day of the new pay period) or thereafter.
- Sign-Off locks the timecard and schedules from further editing by employees and managers for the associated time period.
- Edits may be done to a signed off timecard by first removing the Sign-Off. You must have the “Remove Sign-Off” privilege in your Access Profile in order to perform this function. In most companies this privilege is reserved for payroll personnel.
- Sign-Off can be removed by anyone who has the “Remove Sign-Off” privilege. Unlike approvals, Sign-Offs do not have to be removed by the person who originally performed the Sign-Off.
Printing a Timecard

To print a timecard:

1. Click the **Print Timecard** button. A separate window will open with a preview of the timecard as it will print.

2. In the *Print* dialog box select the printer, then click **Print**.

![Timecard Preview](image)

Viewing Accruals Information

Accruals are amounts of time that employees earn as benefits such as vacation, sick, or personal time. You can view an employee’s accrual balances by clicking the **Accruals** tab located directly beneath the timecard grid.

Workforce Timekeeper contains a powerful accruals engine which can handle virtually any accrual policy. Your company may elect to have Workforce Timekeeper calculate your accruals, or if your accruals are calculated by your payroll system, the balances can be imported into Workforce Timekeeper for easy viewing by the manager and/or employees.

The following information is displayed when the **Accruals** tab is clicked:

**Accrual Code** – the code that identifies and holds the type of accrual balance, such as vacation, sick, or personal time.
**Accrual Available Balance** – the balance for the accrual code as of the day selected in the timecard. If no day is selected, the balance will be as of the last day of the time period being displayed in the timecard.

**Accrual Units** – the unit associated with an accrual code; either hours, days, or money.

**Accrual Reporting Period** – this is generally the calendar year (1/01-12/31) or your company’s fiscal year as defined in System Settings

**Accrual Opening Balance** – the balance as of the first day of the Accrual Reporting Period.

**Accrual Ending Balance** – the balance as of the last day of the Accrual Reporting Period. This will include any future requests for time off as well as any accrual earnings, such as an anniversary grant.

<table>
<thead>
<tr>
<th>Accrual Code</th>
<th>Accrual Available Balance</th>
<th>Accrual Units</th>
<th>Accrual Reporting Period</th>
<th>Accrual Opening Balance</th>
<th>Accrual Ending Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERSONAL</td>
<td>288.00</td>
<td>Hour</td>
<td>Thu 1/01 - Thu</td>
<td>246.00</td>
<td>304.00</td>
</tr>
<tr>
<td>SICK</td>
<td>326.00</td>
<td>Hour</td>
<td>Thu 1/01 - Thu</td>
<td>246.00</td>
<td>326.00</td>
</tr>
<tr>
<td>VACATION</td>
<td>301:12</td>
<td>Hour</td>
<td>Thu 1/01 - Thu</td>
<td>223:25</td>
<td>335:12</td>
</tr>
</tbody>
</table>
Other important information about accruals:

Projected credits in the Accrual Ending Balance only apply to companies where Workforce Timekeeper is calculating the accrual balances. Projected credits are based on fixed grants, not earned grants. A fixed grant defines periodic accrual increases in preset amounts. An earned grant uses one or more pay codes to calculate the amount of accrual credit an employee earns during a pay period or other interval of time.

Workforce Timekeeper calculates accrual balances from the last day in the selected time period (e.g. “Current Pay Period”). Accrual balances are updated when the timecard is totaled.

If hours have accrued, but the employee is still in a probation period, the probation status (p) is indicated in the hour or money values.
GROUP EDITING

You can perform transactions on multiple employees at the same time by using one of the Group Edit functions. Depending on the privileges granted to you in your Access Profile, Group Edits allow you to add or delete punches; add or delete amounts; apply an approval or Sign-Off to timecards; reset, update, suspend, or reinstate accruals; or add/edit transactions for employee schedules.

Performing Group Edits

Performing a Group Edit from a Workforce Genie

1. Select the employees to be included in the Group Edit by holding down the Ctrl key and clicking on their name, or click Select All Rows to perform the Group Edit on all employees.
2. Select an option from one of the menu tabs and complete the applicable dialog box.

For example, as a manager you may want to approve your employees’ timecards after editing them at the end of the pay period.

To perform this Group Edit, you would:

1. Select the employees whose timecards you want to approve from the Pay Period Close Genie.
2. Click the Approval button in the header.
3. Click the Approve Timecard option.
4. Click Yes to the “Are you sure you want to Approve?” prompt.
5. Refresh
Note: The options which appear under each Group Edit function are defined in your Function Access Profile. You may not have access to all of the options shown in the above example.

Menu tabs are also available for you to:

- Add/edit punches for multiple employees.
- Add/delete amounts for multiple employees.
- Update, reset, suspend, or pay out accruals.
- Add/edit or duplicate a person in Workforce Timekeeper.
- Populate timecards from schedule (pay from schedule).

About Group Edits

Group Edits are processed by your Kronos web server, not your PC. Consequently, depending on the type of Group Edit and the number of employees selected, it may a few seconds or several minutes for the edit to be completed. After performing a Group Edit, you can check to see the status of what was processed by clicking on the Group Edit Results link, located in the Quick Links widget. Group Edit Results will display your completed Group Edits you have performed starting with the most recent and working backward, listing the date and time that the Group Edit was performed, who performed it, the status, and results. If the results indicate any failures in the Group Edit transaction, a “Details” link will be displayed. Click the link to see more specific information about the failures.
Group Edits also appear in the *Audits* tab of the employee timecard listing the username of the person who performed the edit along with various other information including the date and time the transaction occurred.
HYPERFIND QUERIES

HyperFind Queries are simply filters which allow managers to select a subset of employees from all of their Home employees. Unless changed by your Kronos System Administrator, widgets and genies default to the All Home HyperFind which allows managers to see all their employees. If a manager has responsibility for more than one department or unit, he or she may want to create HyperFind Queries so employee timecards for each department can be viewed and/or approved separately. The ability to create HyperFind Queries is granted in the Function Access Profile assigned to each manager.

Different HyperFind Queries can be selected from the drop down located in the header of the Exceptions widget or the upper right corner of a genie.

Types of HyperFind Queries

Depending on the rights granted in their Function Access Profile, managers can have the ability to create one or more of the following types of HyperFind Queries:

**Ad Hoc** – a temporary Query, good for as long as the manager is logged in or until it is changed.

**Personal** – visible only to the person who created it or to whom it is assigned.

**Public** – visible to all Workforce Managers. The ability to create public Queries is generally reserved for the Kronos System Administrator.
Query Conditions

The manager’s Function Access Profile controls what filters can be used to create HyperFind Queries. Some of the filters that you may have access to include: Employee Name or ID, Primary Account, Worked Account, Pay Codes, Pay Rules, Exceptions, Employment Status, and many others. The conditions you have access to will be displayed on the HyperFind Query screen under the Filter column.

Creating HyperFind Queries

As previously mentioned, there are many conditions (filters) that may be used to create HyperFind Queries. The most commonly used filter is Primary Account, which will segregate employees based on one or more labor entries which make up their Home account.

To create a HyperFind Query based on department using the Primary Account filter:

1. Go to Setup > Common Setup > HyperFind Queries.
2. On the HyperFind screen, click New
3. Click the Primary Account filter (depending on the settings in your Function Access Profile, this may be the default).
4. Click the radio button next to the labor level which designates departments in your company, e.g. “Department.”
5. Select the department for which you are creating the Query. You can either select it from the “Search Results” list and then click the Add button or, if you know the code for the department, you can key it directly in the box to the right of the Department labor level.
6. Click the Add Condition button. You should now see this condition displayed in the Selected Conditions box at the bottom of the screen.
7. Click the + sign next to the Timekeeper filter.
8. Click Employment Status. Notice that it defaults to employees whose status is active as of today.
9. Click the Add Condition button to select this as a condition.
10. Click Save.
11. Click the radio button next to *Personal* – this will be saved as a personal Query, visible only to you.

12. Name the personal Query with the name of the department you selected in step 5 above.

13. Click **OK**.

To test the Query, go to any Workforce Genie and click the down arrow in the *Show* box at the top of the screen. The Query you created will be displayed in the list along with any other Queries you have access to.

**Note 1:** You can select multiple departments within one Query.

**Note 2:** You can create Queries using other filters using the same logic used in the Query you created using the Primary Account filter.
The People Editor is where specific information is kept on all people who are entered in the Workforce Timekeeper system. A person can be a Workforce Timekeeper Employee (anyone who has a timecard), a Workforce Employee (an employee who is able to access his or her own timecard), and/or a Workforce Manager (able to access other people’s timecards).

The ability to access the People Editor is controlled by privileges granted in your Function Access Profile. For example, a payroll or human resources supervisor may have the ability to add, edit, and view all employee information. Managers, on the other hand, may only be able to view information on their employees.

Accessing the People Editor

To access the People Editor:

1. Select the employee(s) from a widget such as the Exceptions widget, or a Detail Genie such as the Reconcile Timecard genie.

2. Click the GoTo button and choose People Editor from the pop-up menu. If you are working from a detail genie, you can also click the People icon in the header, then click Edit.

3. The Summary screen of the employee’s record will appear. If your Access Profile allows you to see other information, simply click the other screens in the People Editor which appear under the Summary screen.
**Person Summary**

**Employee**
- Employment Status: Active
- Hire Date: 12/28/1999
- Accruals Profile: VAC, SICK, PERS FIXED

**User**
- User Name: DBush
- User Account Status: Active
- Last Password Change: 3/23/2015 3:09PM
- User Account is locked: No
- E-mail: D.Bush@company.com
- SSN: 231 99A/Executive Pay

**General Information**

**Accruals & Leave**

**Home Information**
CALENDAR GENIES

Calendar Genies provide managers and employees with a graphical picture of timekeeping, scheduling, and attendance activities for any date range. Viewable formats include weekly, monthly, and multi-monthly.

Calendar Genies can display exceptions, pay codes, hours worked (e.g. regular and overtime), shifts, comment and transfer indicators, and attendance events (requires Workforce Attendance licensing). Colors and text are used to designate different events and event descriptions. The events and activities displayed in your Calendar Genies are controlled and maintained by your Kronos System Administrator.

The Calendar genie that comes with the system is called Work and Absence Summary, and is located in the Quick Links widget. Below are examples of a Calendar Genie displayed in both weekly and monthly formats.
Time Off Requests

The Requests widget allows managers to see all requests submitted by his/her employees. Other pertinent information is also available such as who requested, for what time period, when it was submitted, etc. The Request widget is activated by moving it to the Center workspace of the Navigator, or by clicking the Request Manager Alert icon at the top of the screen.
Using the dropdown menu selection at the top, you can specify the time period for which you want to view requests.

The calendar icon to the right of the dropdown menu can also be used to select a start and end date.

Use the **Status** drop down to select which requests you would like to see (Submitted, Approved, Rejected, etc.).
Click the request to highlight it, then use the buttons at the top of the Requests widget: Edit, Approve, Refuse, Pending, Retract to perform the appropriate action.

Clicking one of the action buttons will open up a dialog box where you can complete the action including adding a Comment.
After the action has been performed, double click the request or highlight the request and click the Details button at the top of the Request widget to view the history of the request.
A request that has been approved will now be reflected in the employee’s schedule.
SCHEDULING IN WORKFORCE TIMEKEEPER

Employee schedules are administered in the Schedule widget.

Access to scheduling features is controlled by the Function Access Profile assigned to each manager. Some of the functionality described below may not be available to all managers depending on the privileges granted in their Function Access Profile.

Schedules are made up of three building blocks, some or all of which may be used in your company.

- **Shift** – A unit of time with a designated start and end (ex: 7a-3p)
- **Pattern** – A series of shifts over time (ex: 7a-3p Mon-Fri)
- **Group** – A way of classifying employees whose schedules are the same (e.g. First Shift, Second Shift, Third Shift)
Schedules can be assigned to employees in several different ways:

- Shifts can be manually assigned to an employee on a daily or weekly basis. This is rarely done, but may be useful in the case of part time or per diem employees.

- Schedule Patterns can be assigned to employees. Once assigned, the manager or scheduler needs only to adjust the schedule if the employee’s work day deviates from the schedule. For example, if one employee swaps shifts with another employee.

- Employees can be assigned to a Group Schedule. There are two types of Group Schedules: Inheritance and non-inheritance. When an employee is assigned to an Inheritance Group, they automatically acquire the schedule pattern assigned to the Group. Non-inheritance Groups have no schedule pattern assigned to them. Employees assigned to a Non-Inheritance Group generally have their own individual schedule patterns.

**Helpful Tools**

**Shift Templates** – predefined shifts which can be used over and over for creating and modifying schedules

**Pattern Templates** – predefined patterns which can be assigned to individual employees and group schedules

**Creating Shift Templates**

1. Go to **Setup > Schedule Setup > Shift Templates**.
2. Enter the name of the shift – be descriptive (e.g. “7a-3p”).
3. Enter the start time of the shift in the **Start Time** cell.
4. Enter the end time of the shift in the **End Time** cell. **Note:** If the end time occurs on a different day than the start time, change the **Day** column to “2” for the end time.
5. Click **Save**.
To include a break in the shift (such as a meal break), change the **Type** column to “Break,” then enter the start and end times on that line in the appropriate cells.

To include a transfer in the shift (such as when the employee works in a different department or job than his Home labor account), change the **Type** column to “Transfer,” enter the start and end times when the employee will work in this other department/job, click the down arrow in the **Transfer** column, and select the correct entry for the appropriate labor account. The drop down list will display recently-used items; if the needed item is not listed, click **Search** to locate it.

You can also schedule a Work rule transfer (such as On-Call) by following the same procedure as outlined above and selecting the appropriate Work rule in the lower left corner of the **Select Transfer** screen.
Creating Pattern Templates

1. Go to **Setup > Scheduler Setup > Pattern Templates**.
2. Enter the name of the pattern – be descriptive (e.g. “7a-3p M-F”).
3. Change the *Recurring Weeks/Days* number to reflect how often the pattern repeats. For example, a Monday through Friday schedule repeats every 1 week. An “every other weekend” pattern repeats every 2 weeks.
4. Highlight the worked days in the pattern by clicking and dragging or using Ctrl/click on the appropriate days.
5. Click the **Insert Shift** button, select the appropriate shift template, and then click **OK**. The highlighted days should now contain the shift you selected.
6. Repeat this process for all worked days in the pattern.
7. When finished building the pattern, click **Save**.

**Note:** After highlighting the worked days in the pattern in step 4 above and clicking on the “Insert Shift” button, if you do not see a Shift Template for the start and end times you need, do the following:

1. After highlighting the scheduled days to be worked (step 4), click the **Shift Editor** button.
2. Enter the start and end times of the shift in the appropriate columns.
3. Click **OK**.
4. Repeat the above steps until all worked days in the pattern have shifts assigned to them.
5. **Save**.
Creating and Editing Schedules

Most scheduling functions can be performed from any Detail Genie or the Schedule widget. Schedule edits can be applied to multiple employees simultaneously provided the same edit is being applied to each employee. For example, the same pattern can be assigned to multiple employees with one transaction.

Assigning a pattern template to employees in the Schedule widget:

1. In the Schedule widget, right click on the employee name, then click the Schedule Pattern button.
2. On the Schedule Pattern screen, click the Pattern Template down arrow, select the appropriate pattern, and then click OK.
3. Select the appropriate pattern from the pick list.
4. Click OK.
5. Enter the Work Start Date (Note: must be within the date range currently selected for the Schedule Editor Genie).
6. Leave the Forever box checked or uncheck the Forever box and enter the End Date.
7. If the employee has an existing pattern that you want to replace, click the Override Other Patterns box.
8. Save.

Note: The Anchor Date is applicable only to rotating patterns (for example a pattern where every other weekend is scheduled). You do not have to change the Anchor Date from the default date for a pattern that repeats every week.
Assigning a pattern template to employees in a Detail Genie:

1. From a Detail Genie (such as Reconcile Timecard), select employee(s) by highlighting them.
2. Click the Schedule tab in the header and select Add Pattern from the drop-down menu.
3. On the Add Pattern screen, click the Pattern Template down arrow, select the appropriate pattern, and then click OK.
4. Enter the Start Date that the employee(s) begin this pattern (cannot be in a signed-off pay period).
5. Leave the Forever box checked or uncheck the Forever box and enter the End Date.
6. If the employee(s) have an existing pattern that you want to replace with the new pattern, click the Override Other Patterns box.
7. Save.

Group Schedules

Group schedules are primarily used for classifying employees into standard shifts such as First Shift, Second Shift, and Third Shift. There are two types of group schedules, inheritance groups and non-inheritance groups. When employees are assigned to an inheritance group, they inherit the pattern that is assigned to the group schedule. Employees can be assigned to a group schedule from the Schedule widget or any Detail Genie. Employees can be a member of multiple group schedules, but can only be assigned to one inheritance group.

Creating a Group Schedule

1. Go to Setup > Scheduler Setup > Schedule Groups.
2. Click New.
3. Enter the Group Name.
4. Check the Allow Schedule Inheritance box if you want employees to inherit their schedule when assigned to the group.
5. Save & Return.
Assigning a Schedule Pattern to an Inheritance Group

1. Click the View button (View) in the Schedule widget, then select By Schedule Group.

2. Click the Load Group button (Load Group), select the appropriate Group, then click Apply.

3. Find the selected Group in the schedule, right click and select Schedule Pattern.

4. On the Schedule Pattern screen, click the Pattern Template down arrow, select the appropriate pattern, and then click OK.

5. Select the appropriate pattern from the pick list.

6. Click OK.

7. Enter the Start Date.

8. Leave the Forever box checked or uncheck the Forever box and enter the End Date.

9. If the Group already has an existing pattern that you want to replace, click the Override Other Patterns box.

10. Save.

Assigning Employees to Group Schedules from the Schedule Widget

1. Right click the employee’s name.

2. Select the appropriate Group from the pick list.

3. Enter the Start Date and End Date (or Forever).

4. If the employee is currently assigned to another inheritance Group, check the box for “Remove employees from other inheritance groups for selected date range.”

5. Click Apply.
Assigning Employees to Group Schedules from Genies

1. From any Detail Genie, select (highlight) the employee(s) to be added to the group.
2. Click the Schedule tab in the header, then select Add to Group.
3. Select the appropriate group from the drop-down list.
4. Enter the Start and End Dates in the appropriate dialog boxes. Note: Click Forever in the End Date box if the employee(s) are permanently assigned to this group.
5. Click OK.

Important Information About Group Schedules

- Employees can be assigned to more than one group.
- Non-inheritance group schedules do not have patterns associated with them. Patterns can be assigned to employees whether they are in a schedule group or not.
- Use the Schedule Group Multi-line Genie to see what group(s) employees are assigned to.
- Schedule transactions, such as adding shifts, replacing shifts, appending to shifts, adding patterns, etc., can be done for an entire group or individual employees simultaneously through the Schedule Edits tab on any Detail Genie.
Creating Individual Employee Patterns

If a Pattern Template does not exist that matches a specific employee’s schedule, you can build a pattern for the employee on the fly:

1. In the Schedule widget, right click on the employee’s name and select Schedule Pattern

2. In the Schedule Pattern screen, change the “Define Pattern for” number to reflect how often the pattern repeats. For example, a Monday through Friday schedule repeats every 1 week. An “every other weekend” pattern repeats every 2 weeks.

3. Highlight the days in the pattern that the employee works the same shift. Hold the Ctrl key down to select multiple days.

4. Click the Add Shift button.

5. Enter the Start and End times for the shift. Remember that this is only for the days that are highlighted on the previous screen.

6. Click OK. The highlighted days should now have shifts in them.

7. Repeat this process if the employee works other shifts on different days of the week until all worked days have been accounted for.

8. Enter the Start Date that the employee begins this new pattern.

9. Leave the Forever box checked or uncheck the Forever box and enter the End Date.

10. If the employee(s) have an existing pattern that you want to replace with the new pattern, click the Override Other Patterns box.

11. Click OK. You should now see the pattern assigned to the employee in the Schedule widget.

12. Save.
Making Temporary Changes to Employee Schedules

If an employee works something other than his or her normal schedule on a given day, you can make temporary changes that will not become part of the permanent schedule. For example, an employee who normally works 8:00am to 4:30pm Mon-Fri may be asked to work 10:00am to 6:30pm on a given day. The manager can change the employee’s schedule for that one day using one of three methods:

1. **In Cell Editing** – simply click the cell for the day in question, delete the existing schedule, and type the new shift into the cell using the following format: 10a-630p.

2. **Copy/Paste** – click on a cell from another employee which matches the shift start and stop times that you want, hit **Ctrl/C** on your keyboard to copy the shift to the Clipboard, then click on the appropriate cell for your employee and hit **Ctrl/V** to paste the shift to the new cell. You can also use **Ctrl/X** – Ctrl/V to cut and paste shifts.

3. **Insert Shift Template** – right click on the cell for the day in question and choose *Add Shift* from the dialog box. Click the *Insert Template* button that matches the start and stop times for the employee’s temporary shift and click **OK**. This feature is particularly useful for inserting shift templates which are already configured with transfers to other departments or jobs.
REPORTS

Workforce Timekeeper comes with standard reports which are assigned to managers via their Report Profile, which allows them to run only the reports that are applicable to their operation.

Reports can be run for timecards, schedules, accruals, employee information, audit trails, and configuration profiles.

All reports default to the screen and are produced in PDF format, which requires Adobe Acrobat Reader version 4.0 or higher to view the report. Adobe Acrobat Reader can be downloaded free of charge from http://www.adobe.com.

Running Reports

To run a report, follow these simple steps:

1. From a Detail Genie (such as Pay Period Close), select the employee(s) to be included in the report. If all employees are to be included, click Select All Rows in the Genie header.

2. Click the Go To button and select Reports. The Reports widget will become active in the center workspace.

3. On the Reports screen, select a report from the categories listed on the left side of the screen. As soon as you click on the report name, a description of the report and additional selection criteria are displayed. Note: Different reports have different options available.

4. If you want to change the employees selected for the report, click the People down arrow and select a HyperFind query.

5. Select the appropriate Time Period.

6. Change the Report Output as appropriate. All reports default to PDF format. Some reports may also be available in Excel format


8. Click Refresh Status until the Status column says “Complete.”
9. Click **View Report**. This will open an Adobe Acrobat Reader session and the report will be displayed on your screen. When finished viewing the report, close Adobe Acrobat Reader by clicking the X in the upper right corner of the screen.

**Note:** The maximum number of employees selected from a Genie to be included in a report is 250. If the number of employees to be included in the report is higher than 250, use a HyperFind Query on the *Reports* page to run the report.

## Creating Favorite Reports

When a certain report needs to be run frequently, a Favorite report can be created to run with the specified conditions. These reports are saved in the “Favorite Reports” section. From the “Reports” screen, select a report and click **Create Favorite**.

You will then have the ability to give the report a name, add a description, and specify a HyperFind Query or time period. When you have finished configuring your report, click **Save Favorite**. The report will then appear in the Favorite Reports section.