Kronos
Workforce Timekeeper
Time and Attendence System
Computer Training Manual

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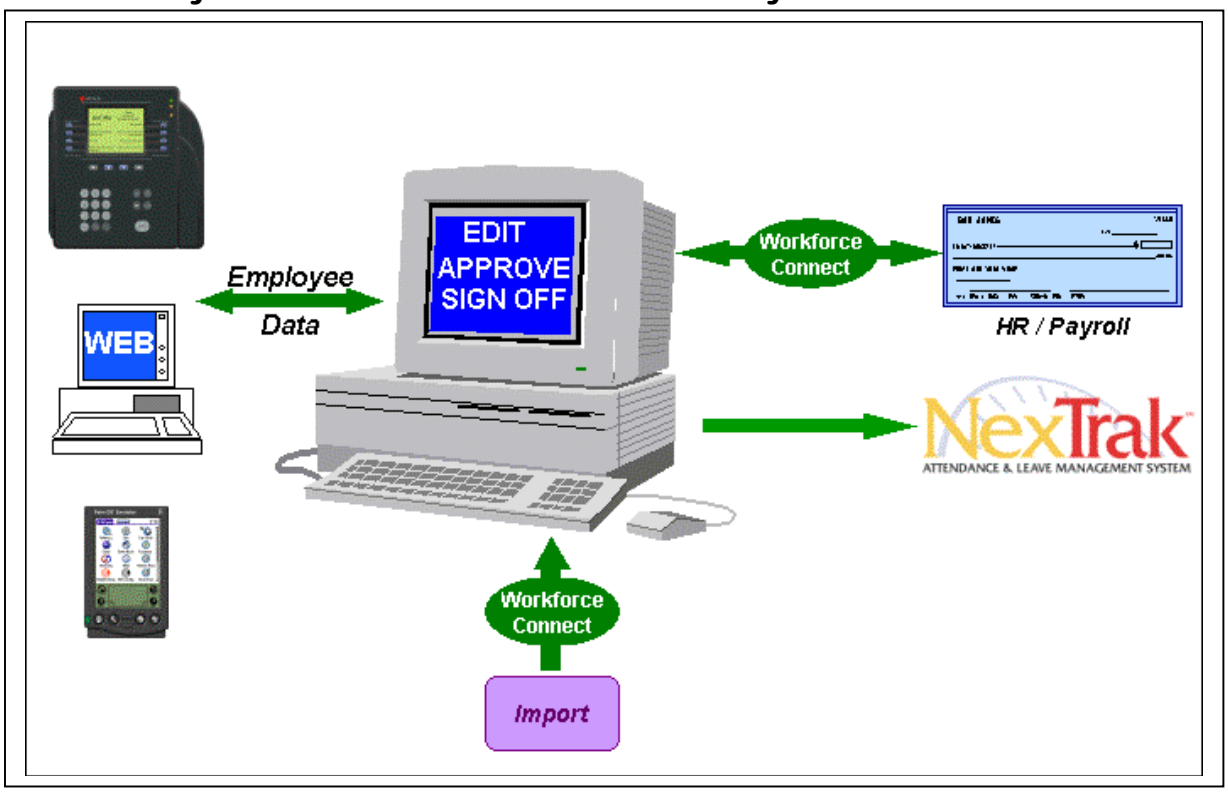
A. Introduction

Welcome to the Kronos Workforce Timekeeper System Training Class.

After completing this course, you should be able to:

- Be familiar with basic Workforce Timekeeper functions and terminology.
- Understand navigation concepts.
- Review, apply edits and approve timecards.
- Generate daily reports.
- Edit and maintain schedules.

"Punch to Payroll Process" Pictorial Summary



B. Log On

As you log on, the system checks the access profile that was created for you when your personal data was entered into the system. Workforce Timekeeper uses a display profile, assigned specifically to you, to open your default view in a Web browser.

To launch Workforce Timekeeper, click on desktop icon (if available) on your computer desktop; alternatively, a link will be available via the Holy Redeemer Health System Intranet.

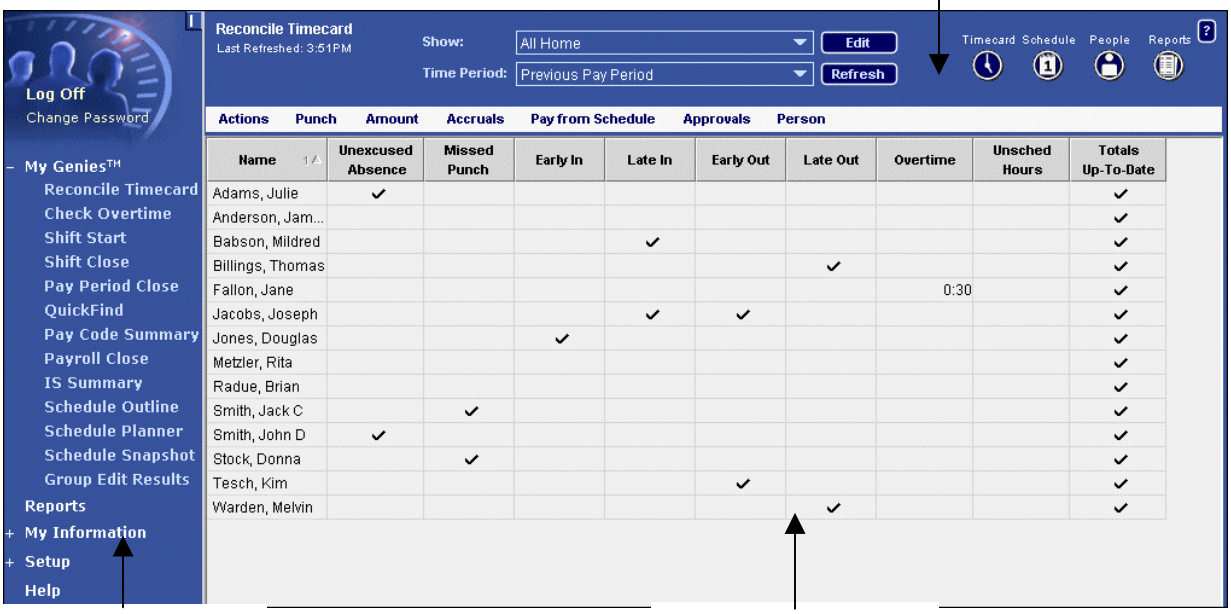
The Workforce Timekeeper login screen will be displayed:

Steps To log on to Workforce Timekeeper:

1. Enter your User Name.
2. Enter your Password.
3. Click **Log On**.

C. Navigation and Genie Overview

Examining the Timekeeper Page



The Workforce Timekeeper display is customized according to time and attendence policies, as well as your access profile.

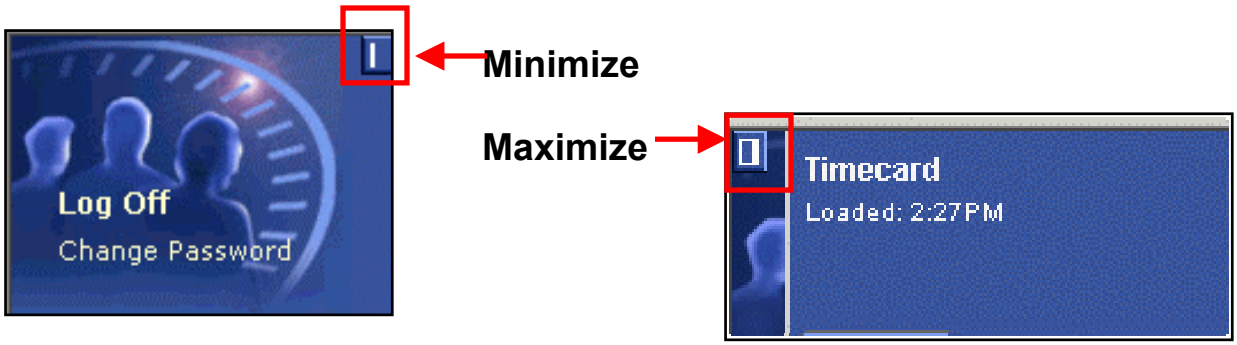
The main Workforce Timekeeper page contains three main areas.

Navigation Bar The navigation bar is located on the left side of the page. This area contains the Workforce Timekeeper features to which you have been granted access. You select a link by clicking on the text. When you click one of the links, the selected component opens in the workspace.

Header The header is located at the top of the page underneath the Web browser menus and icons. This area identifies which employees and what time period are currently selected. The header also shows a menu of the tasks you can perform.

Workspace The workspace is the large area in the middle of your page. This area contains detailed information abou the employees and time period that are currently selected.

The **Minimize/Maximize** button in the upper right corner of the Navigation Bar allows you to reduce the size of the navigation bar and restore its default size with one click. You can also resize the navigation bar and the workspace by dragging the frame border with the mouse.



The **Show drop-down** box in the header area of a Detail is a HyperFind query used to populate the Genie with a selected set of people. When Show is used, the Genie automatically changes to display only those people who match the query criteria.

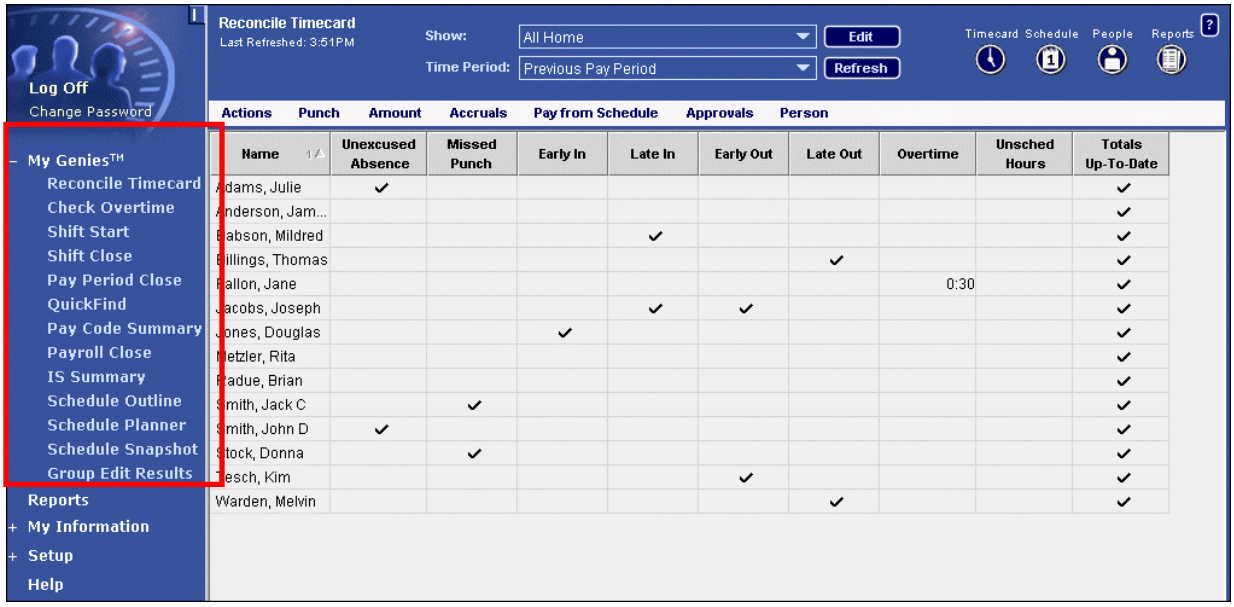
Each Workforce Genie displays information relative to time period. When you click in the **Time Period** box, a drop-down list displays the available time period choices. Click an option to change the time period for the current editing session.

When you select a Workforce Genie, the workspace displays the most recent information gathered from the database. Information in the database, however, can change. And those changes might not be reflected on the page unless you click **Refresh** from the header. The time of the most recent Refresh is identified in the upper left corner of the header:

Once a Workforce Genie appears, one to four **Launch** icons might display in the upper-right corrner of the header. These icons are the primary way to navigate from one Workforce Timekeeper compenent to another.

Workforce Genies

Workforce Genies are powerful tools that provide you with instant feedback on critical time, labor, and schedule information. They are helpful in displaying critical information in an easy to read format, so you can quickly identify which employees might need edits or adjustments.



Three types of Workforce Genies are:

The **Detail Genie** is based on employee name. It is often the starting point for editing timecards, schedules, people attributes, and requesting reports for selected people. Some common Detail Genies visible on your navigation bar include Reconcile Timecard and Pay Period Close.

- **Reconcile Timecard Genie** displays the employees to whom you have access, and shows the following types of information:
  - Employee name
  - Exceptions, such as unexcused absences and missed punches
  - Overtime hours
  - Unscheduled hours
  - Whether totals are up-to-date

- **Pay Period Close Genie** is used to prepare for payroll processing. It is used to determine which managers have approved the timecards, whether employees have unexcused absences or missed punches, and the total number of hours for each employee.

QuickFind Genie allows you to search for one or more people, based on their name and ID. Quickfind lets you quickly search for one or more specific employees who might not be in the group of employees that currently appear. You can also use **wildcard** characters (* % - ?). When you are setting up a search or query, wildcards let you search for database entries with a partial string of characters. In a search or query, a wildcard character, such as the asterisk (*), percent symbol (%), question mark (?) or underline (_), represents other characters.

- Use either the asterisk (*) or the percent symbol (%) to indicate that multiple characters can occupy a position in the search string. For example, to search for the names of all employee IDs that begin with the letter C, enter c* or c% in the text box and click Search.
- Use the question mark (?) or underline (_) to indicate a single character occupies a position in the search string. For example, to search for four-digit numbers starting with 07, enter ?? 07 in the text box and click Search.

Roll-up Genie is a roll-up summary that displays a header area and a table of information in the workspace showing time and labor details about groups belonging to a particular labor account. A Roll-up Genie is intended for use by supervisors such as a payroll administrator who needs to view summary information for a large group of employees.

Scheduling Genies provide tools you can use to do the following:

- Build schedules for individuals or groups of employees
- Create groups of employees who use the same schedule
- View schedules for the set of employees and time period you select
- Adjust schedules as needed

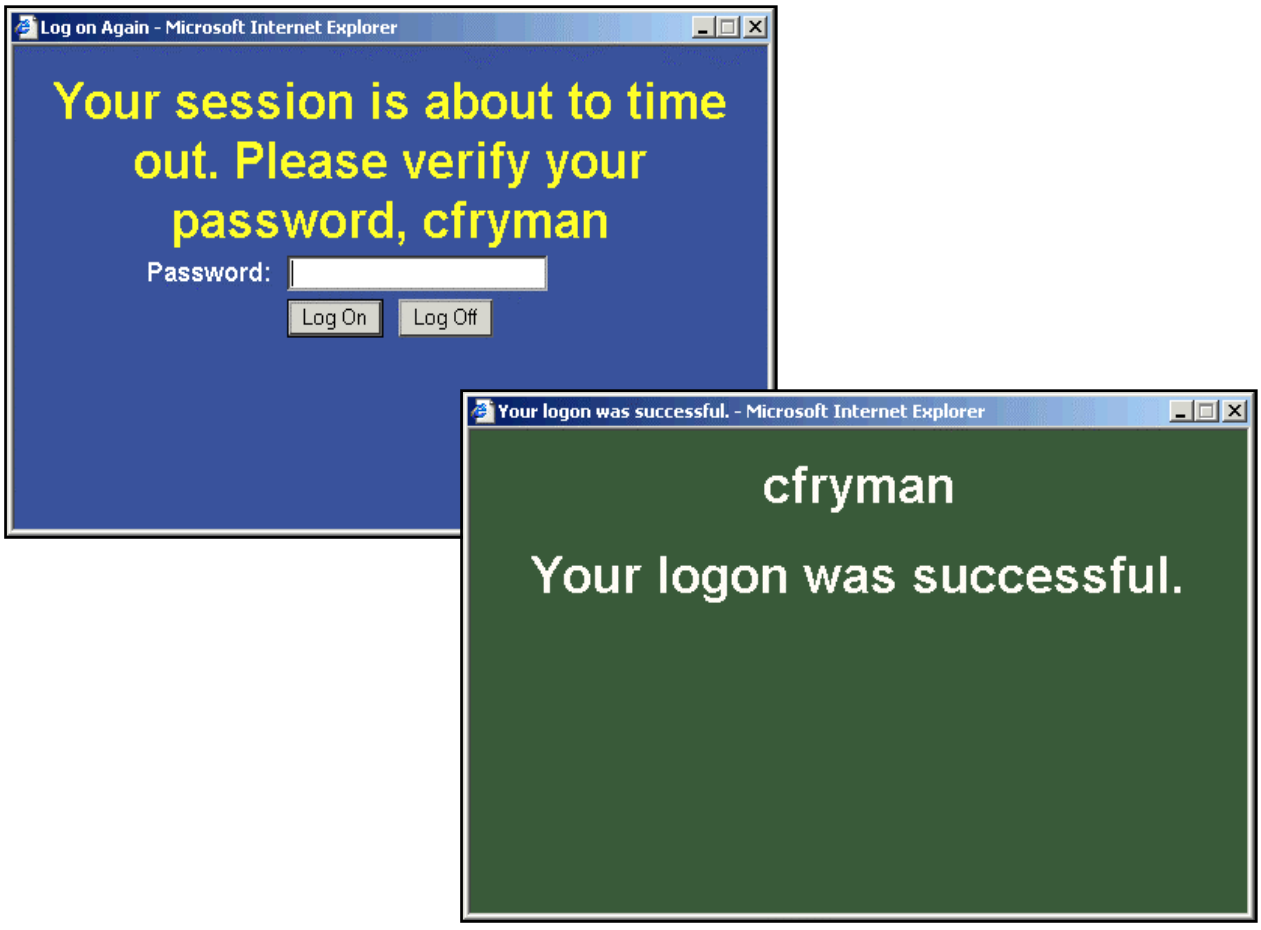
An employee's scheduled time is automatically charged to his or her home account. You can schedule pay codes and make pay code edits, or transfer time to another account or work rule as required. Scheduled pay codes and shifts can be automatically transferred to the employee's timecard so he or she can be paid from the schedule.

Log On Timeout

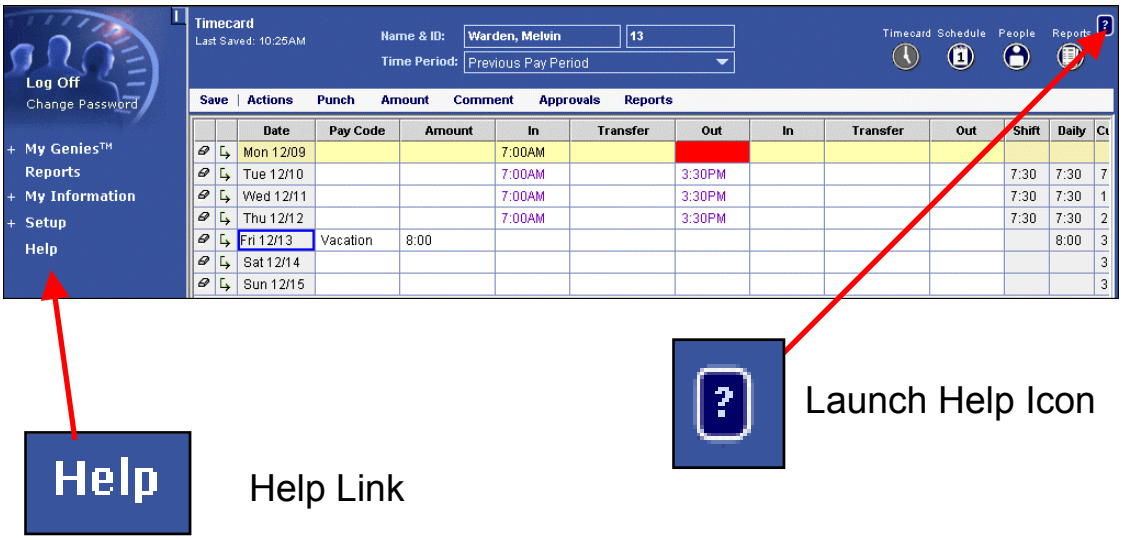
If you are logged on for a period of time without Workforce Timekeeper detecting any activity, you will receive a message that states, “Your session is about to time out. Please verify your password, (user name)”.

You can do one of the following:

- Enter your password and click Log On to continue your session where you left out. Once you enter your password, you will receive another message that states “(user name) Your logon was successful.”
- Click Log Off to end your Workforce Timekeeper session.



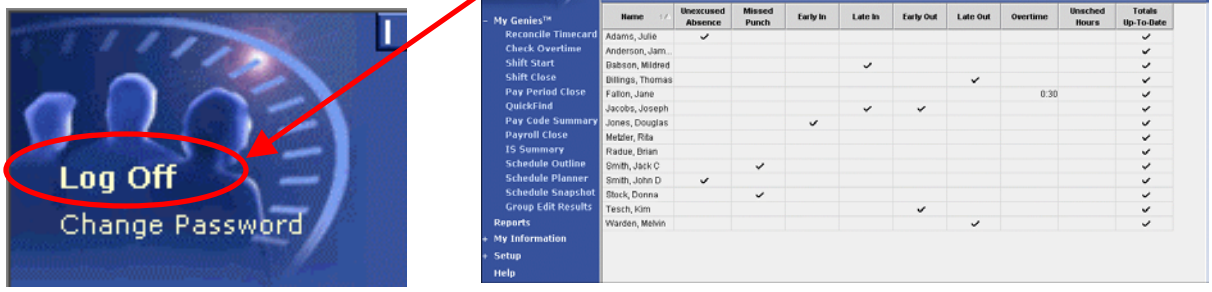
Accessing Online Help

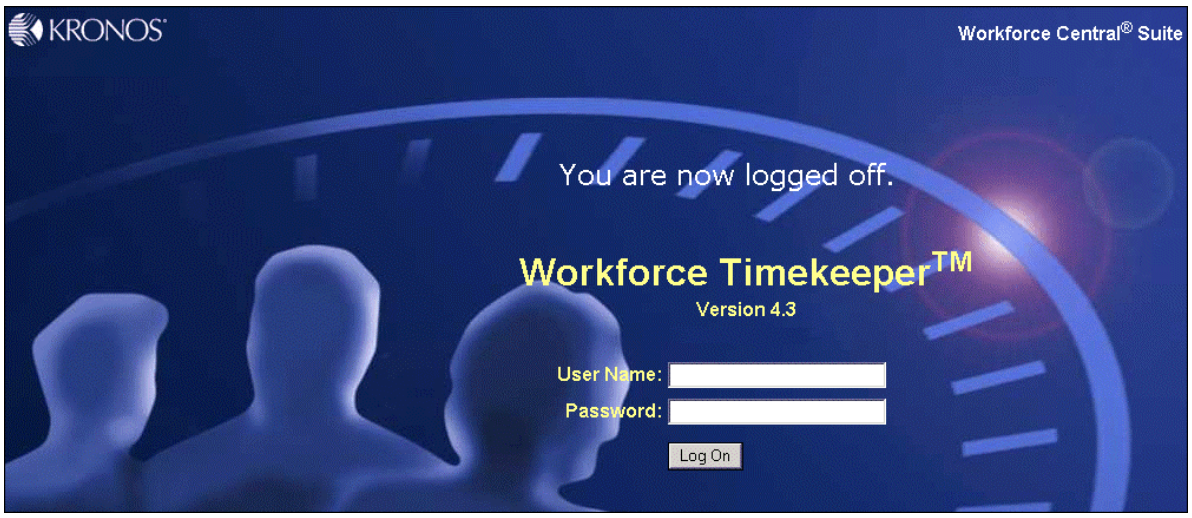


All components within Workforce Timekeeper have online Help, which you access in the following ways:

- Select the Help icon (?) located in the upper right corner of the workspace. A Help topic for the visible component opens with links to various other related topics.
- Click the Help link at the bottom of the navigation bar to open the Workforce Timekeeper Help table of contents. Click a component in the list to expand for chapter headings. Click a chapter heading to expand for a list of topics. To access information, click a topic name.
- Click the Help button within individual dialog boxes to obtain Help about the visible dialog box.

D. Logging Off





When you log off Workforce Timekeeper, you are ending your session. You will lose any changes if you do not save the changes before logging off.

Steps To log off:

1. Select **Log Off** from the navigation bar.
2. Review the message that appears, confirming you that you have successfully logged off.

Important To close the Workforce Timekeeper application, you should select the Log Off from the navigation bar before closing your browser. **If you click the X in the upper-right corner of your browser without logging off, your connection to the application might remain open, which makes it possible for another person to view and edit your information.**

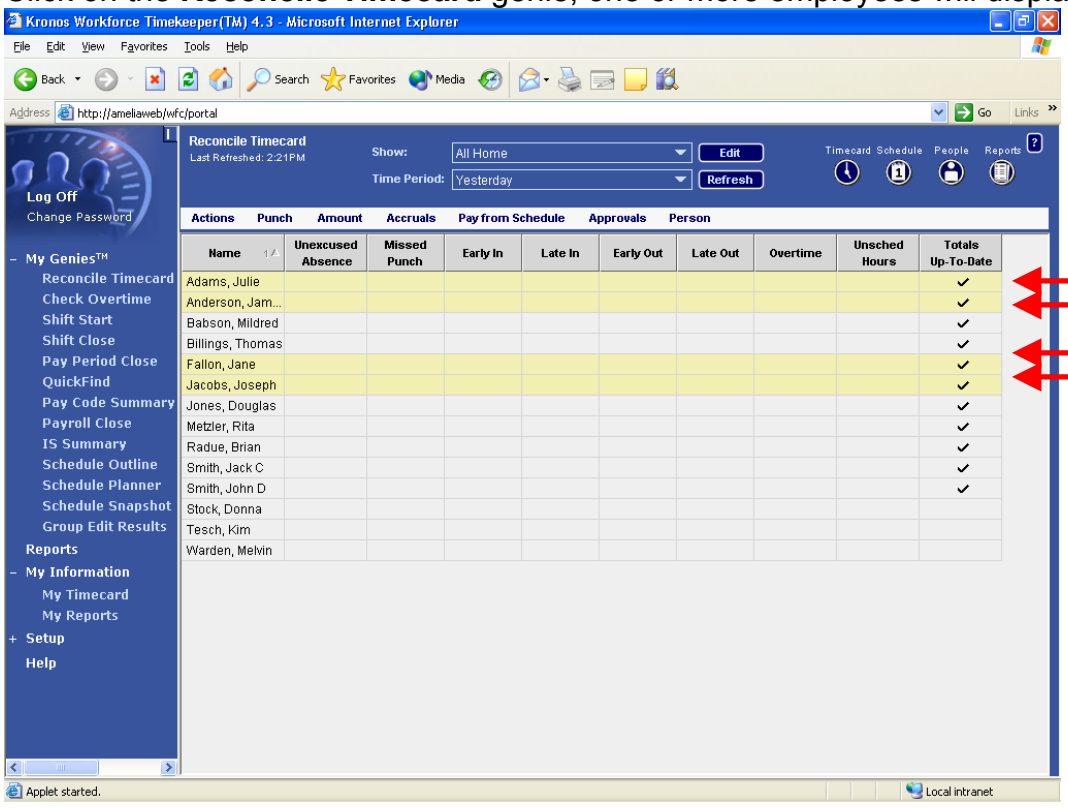
E. Timecards

Your access profile defines the timecards that you can access. Depending on your access profile, you can perform the following tasks:

- Open your own timecard by clicking My Timecard on the navigation bar (under My Information).
- Open the timecards of other employees from a Time and Attendance Genie or a Workforce Genies for Scheduling.

Example:

Click on the **Reconcile Timecard** genie; one or more employees will display



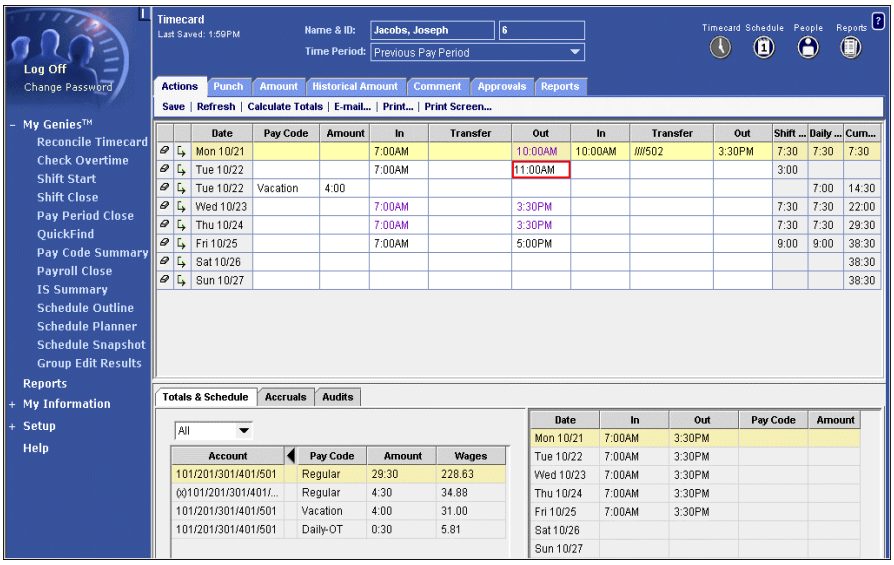
To select more than one employee, hold the CTRL key while clicking on another row

To proceed to view Timecards for one or more employees click on the Timecard launch icon

You may also double click on one row if viewing only <u>one</u> Timecard

Hourly Timecard

- Used to enter start and stop time stamps over the Web
- Captures and displays start and stop times, non-worked time, job transfers, and exceptions
- Allows entry of pay code amounts and durations amounts
- Can be pre-populated using scheduled times



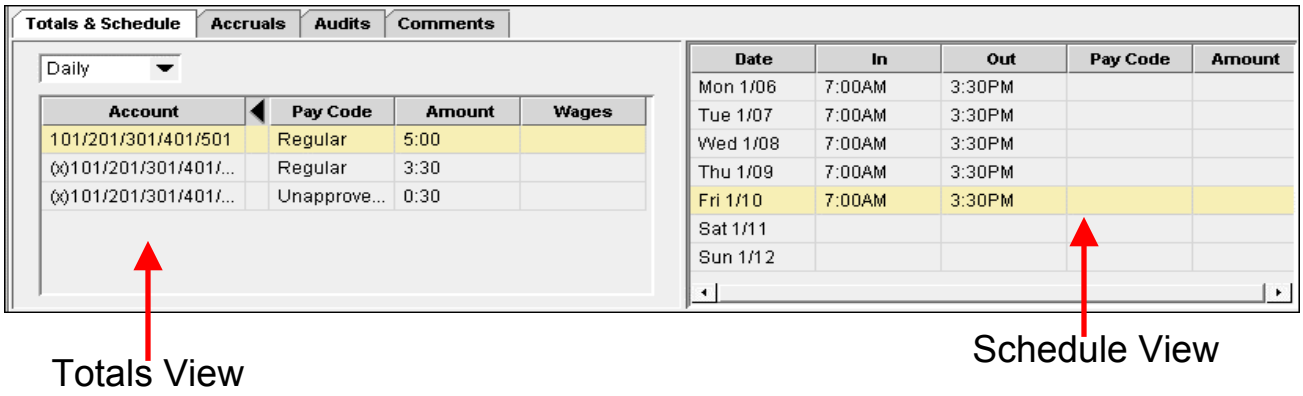
Project Timecard

- Used for charging time to a project or job.
- Captures pay code amounts and durations amounts.
- Can be pre-populated with schedule data.
- No start and stop times
- Dates appear horizontally

Timecard Tabs

The timecard tabs appear under the timecard grid. When you click one of these tabs, additional information about the visible timecard appears.

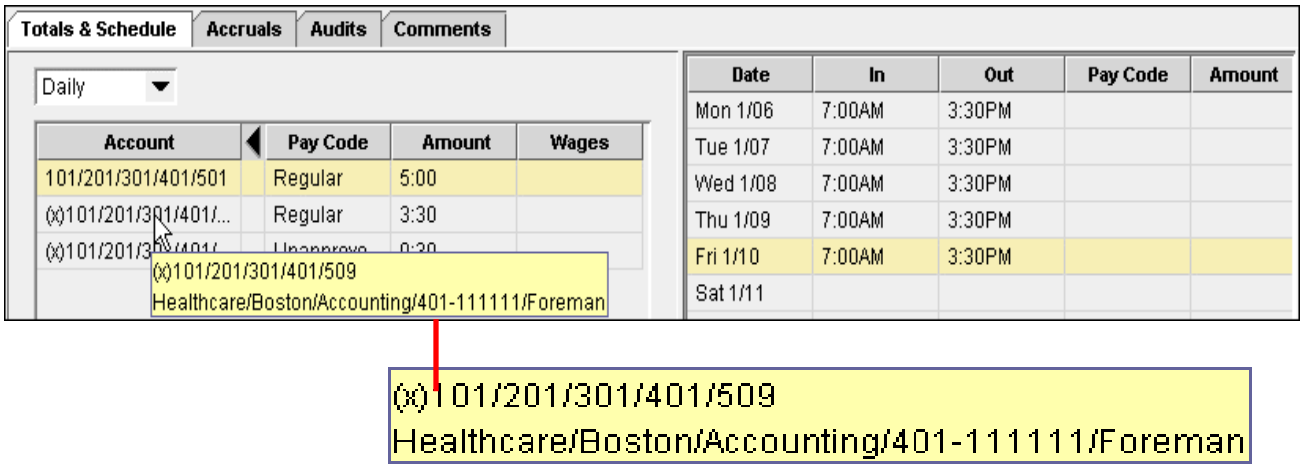
Totals & Schedule Tab



The **Totals & Schedule tab** is the first tab at the bottom of the timecard workspace. When you click this tab, the following areas of information appear:

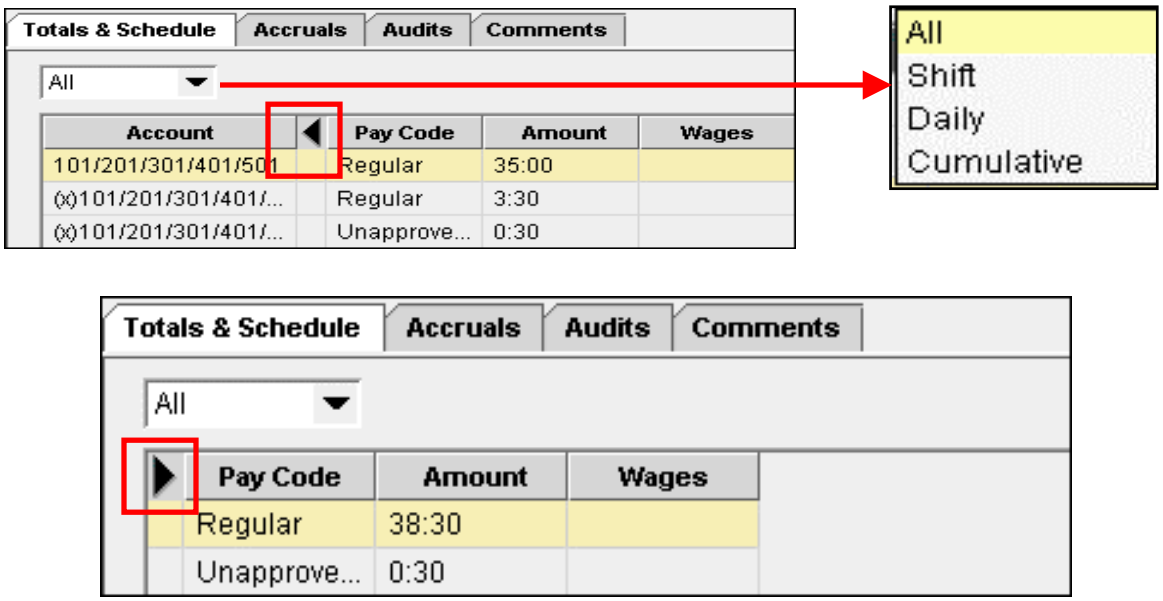
- The area on the left displays the timecard totals
- The area of the right displays the scheduled time for the timecard schedules.

Displaying Labor Account Information



If you hold the mouse over an entry in the Account column of the Totals view, Workforce Timekeeper displays the full details of the labor account entry, including the descriptive text.

Viewing the Totals section



The **Totals section** of the Totals & Schedule tab allows you to display a breakdown of totals in a number of ways. In an hourly timecard, you can choose to view daily or all totals. In an hourly timecard, you can also view shift or cumulative totals.
The Totals tab displays the summation of hours by labor account or pay code. You can change the summation by using the embedded directional < or > keys located between the Account and Pay Code columns.
Columns in the Totals section can include the following:

- **Account** - Total of transactions charged to each labor account. An **x** before a labor account indicates that the account is not the home labor account.
- **Pay Code** - The pay code to which the amount is applied. You can move a pay code to a different labor account by making a pay code move
- **Amount** - The number of hours or the dollar amount charged to the pay code.
- **Wages** - The totals section shows the calculation of wages based on the number of hours worked, pay code multiplier, base rate, wage profile, and dollar amounts earned.

Viewing the Schedule section

Date	In	Out	Pay Code	Amount
Sun 1/19				
Mon 1/20(o)	9:00AM	6:00PM		
Tue 1/21(o)	9:00AM	6:00PM		
Wed 1/22	9:00AM	6:00PM		
Thu 1/23	9:00AM	6:00PM		
Fri 1/24(x)	9:00AM	6:00PM		
Sat 1/25				

(x) Not the Home Account

(o) Scheduled Off Day

The **Schedule section** is visible at the bottom of the timecard workspace. The Schedule section displays the scheduled start and end time for all schedules in the time period shown in the timecard. When you select a cell in the timecard grid, the correct day and scheduled time, pay code, and amount are highlighted in the Schedule section.

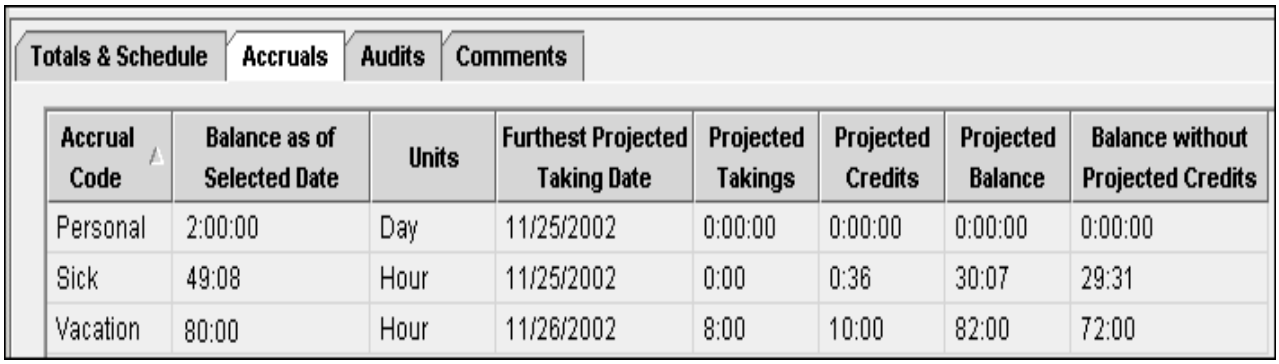
The Schedule section displays an indicator if additional labor account or work rule transfers exist for the schedule in addition to the in and out times.

An (**x**) after the date indicates that additional scheduling details are not visible in the timecard workspace. These details are scheduled labor account or work rule transfers. These scheduled transfers appear as phantom punches in the hourly timecard grid or as phantom amounts in the project timecard grid.

An (**o**) after the date indicates a scheduled off-day with an associated work rule.

You cannot edit the schedule directly from the timecard. You must use one of the Workforce Genies for Scheduling or the Individual Schedule editor to view a schedule comment or edit a schedule.

Viewing the Accruals tab



Accrual Code	Balance as of Selected Date	Units	Furthest Projected Taking Date	Projected Takings	Projected Credits	Projected Balance	Balance without Projected Credits
Personal	2:00:00	Day	11/25/2002	0:00:00	0:00:00	0:00:00	0:00:00
Sick	49:08	Hour	11/25/2002	0:00	0:36	30:07	29:31
Vacation	80:00	Hour	11/26/2002	8:00	10:00	82:00	72:00

The **Accruals tab** is located at the bottom of the timecard workspace. The tab allows you to view accrued time (sick or vacation time) that belong to the employee of the visible timecard. To view accurate accrued time, you must first select a date in the timecard grid. Most information in the Accruals table is based on this selected date.

The following information is included for each type of accrual:

Accrual Code - The code that identifies and holds the type of accrual balance, such as vacation, sick, or holidays.

Balance as of Selected Date - A number that represents the balance available, for example, if you have 40 hours of vacation available, this number is 40.

Units - The unit that is associated with an accrual code. Accrual codes are measured in days, hours, or money.

Furthest Projected Taking Date - The furthest date in the future when a taking is scheduled that affects this accrual code.

Projected Takings - The total amount of time or money scheduled to be used (taken) from the end of the visible pay period through the Furthest Projected Taking Date.

Projected Credits - The total amount of time or money scheduled to be granted (fixed grants) from the end of the visible pay period through the Furthest Projected Taking Date.

Projected Balance - The balance for the Accrual Code as of the Furthest Projected Taking Date, including projected credits and debits.

Balance without Projected Credits - The accrual balance as of the Furthest Projected Taking Date, without the projected credits.

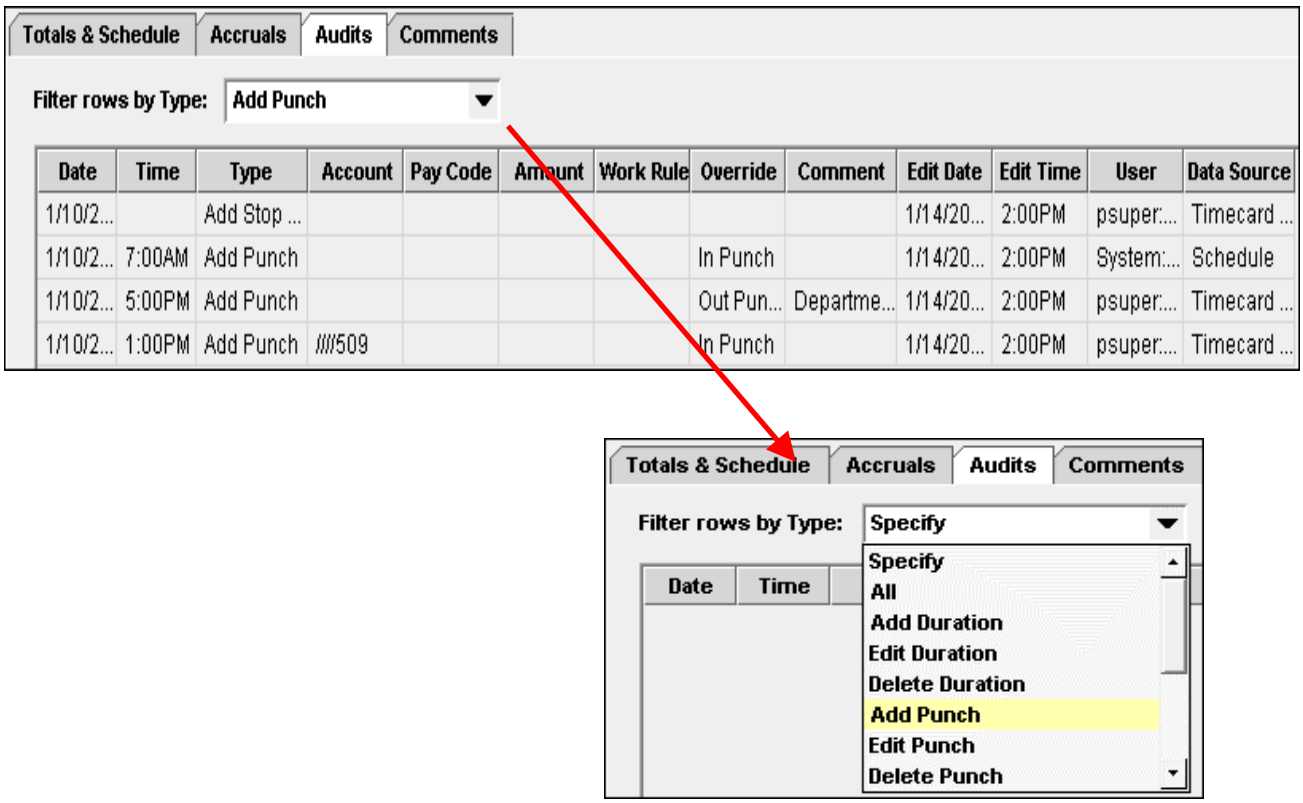
Example

Assume that you are looking at your own timecard and you want to see how much vacation time you have this week and how much you will have several months from now on January 1.

- To view this week's vacation balance, select Week to Date in the Time Period box and select a day displayed in the grid. When you click the Accrual tab, your available vacation time is displayed in the column labeled "Balance as of Selected Date."
- To view your vacation balance on January 1, select Specific Date from the Time Period box and use the calendar to locate January 1. Then, select January 1 in the timecard grid, enter a number of vacation hours, and save the timecard. When you click the Accrual tab, your vacation balance as of January 1 is displayed in the column labeled "Balance as of Selected Date."

If you return the timecard to the current week, your vacation balance shows the amount accrued for the current week, but the Projected Takings, Projected Credits, and Projected Balance columns display information based on the Furthest Projected Taking Date, which in this example is January 1.

Viewing the Audits tab



The Audits tab lists all of the edits made to an employee's timecard. These edits include any group edits that affected the employee's timecard.

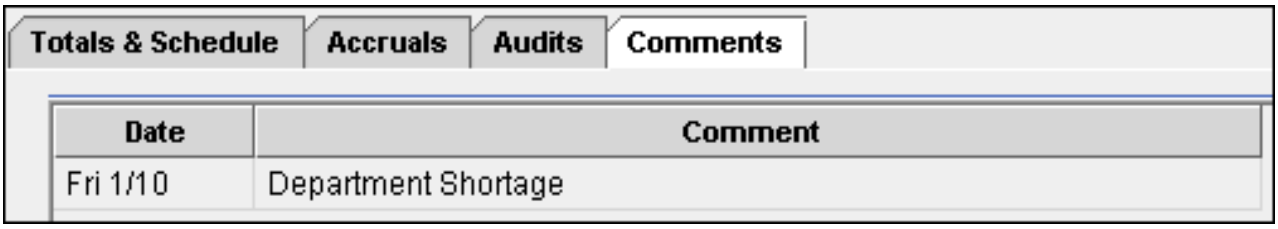
Columns visible in the Audits tab are:

- **Date -** Displays the date to which the edit applies.
- **Time -** Specifies the time to which the edit applies.
- **Type -** Displays the type of edit performed, such as add punch or edit punch, or approval by manager.
- **Account -** Displays transferred labor accounts. **Pay Code -** Displays name of the pay code applied if the edit was associated with a pay code.
- **Amount -** Displays the amount of hours that is applied to the pay rule or to the selected pay code.
- **Work Rule -** Displays the work rule that was applied to the punch or amount.
- **Override -** Displays the override type to which the punch or amount was converted.
- **Comment -** Displays the comments associated with a punch, pay code edit, duration, or historical amount.
- **Edit Date -** Displays the date when the edit was made.

- **Edit Time -** Displays the time when the edit was made.
- **User -** Displays the user name of the person who made the edit.
- **Data Source -** Displays the source of the entry or edit, for example, Timecard or group edits.

Comments Tab

The Comments tab allows you to view all comments that are attached to punches or amounts in the active timecard. The tab at the bottom of the timecard workspace only appears if comments exist in the specified time period.



The Comments tab is located above the timecard grid and displays the following information:

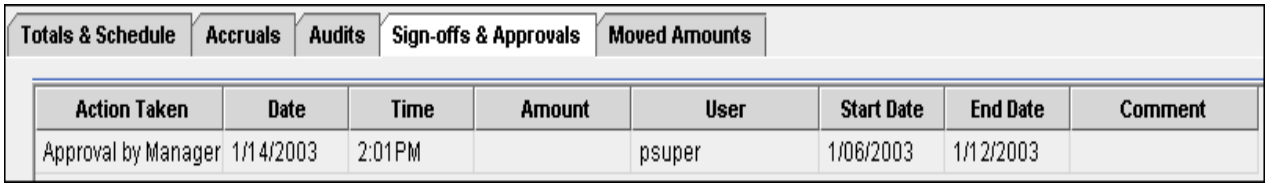
- Date – Date of the associated comment.
- Comment – Descriptive text from the predefined comments list.

Moved Amounts tab

Pay code moves are transactions in which the hours or money associated with a pay code are transferred to another pay code or labor account. The **Moved Amounts tab** at the bottom of the workspace displays move information that was entered during the specified time period.
The Moved Amounts tab only appears if a pay code move was entered during the selected time period. The tab displays detailed information about the moves. You cannot edit the information in the tab area. The tab area is a read-only grid that shows the following information:

- Effective Date - The date on which the result of the modification was applied.
- From Account - The labor account from which the amount was moved.
- To Account - The labor account to which the amount was moved.
- From Pay code - The original pay code from which the amount was removed.
- To Pay code - The pay code to which the amount was moved
- Amount - The number of hours or the amount of money (+ or -) associated with the pay code move.
- Comments - Displays any comments on the edit.

Sign-Off & Approvals Tab

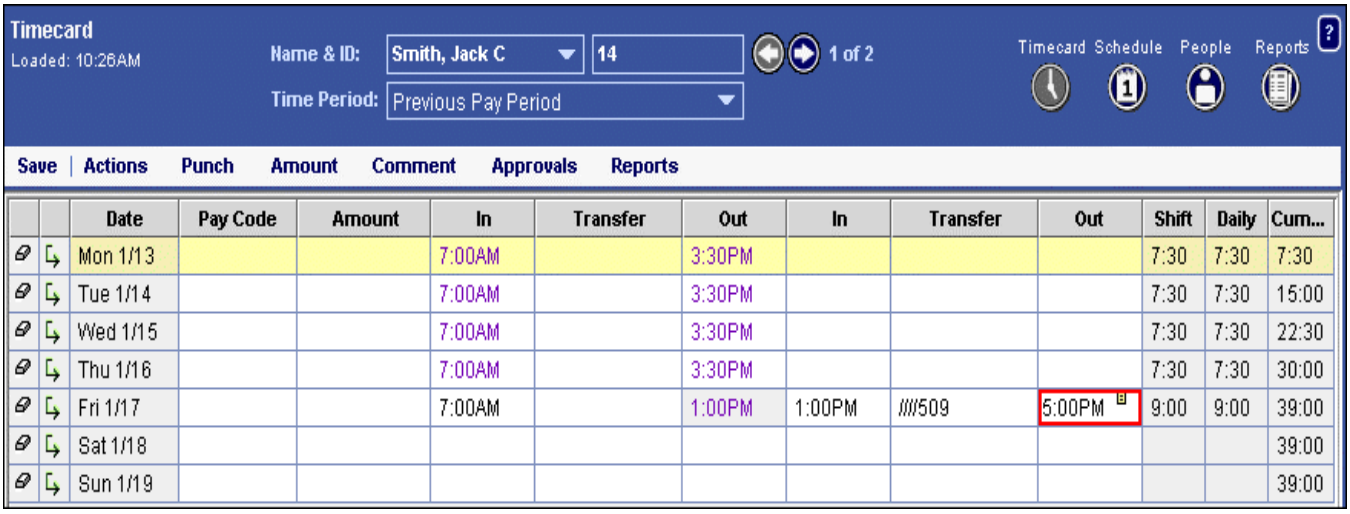


When a manager approves or signs off on a timecard, the Sign-offs & Approvals tab appears at the bottom of the timecard.

Time Card Edits

As a manager, you can review, edit, or approve the timecards of the employees who report to you. You can access one timecard or many timecards at the same time. There are several types of edits that can be performed to a timecard. They include:

- Adding punches
- Adding comments
- Canceling meal deductions
- Entering labor account transfers
- Entering pay code amounts



		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cum...
		Mon 1/13			7:00AM		3:30PM				7:30	7:30	7:30
		Tue 1/14			7:00AM		3:30PM				7:30	7:30	15:00
		Wed 1/15			7:00AM		3:30PM				7:30	7:30	22:30
		Thu 1/16			7:00AM		3:30PM				7:30	7:30	30:00
		Fri 1/17			7:00AM		1:00PM	1:00PM	////509	5:00PM	9:00	9:00	39:00
		Sat 1/18											39:00
		Sun 1/19											39:00

Depending on the task, you can edit the timecard in a number of ways:

- **In cell editing** - Many timecard functions allow you to enter, edit, and delete information directly in the cell using the keyboard.
- **Menus** - The menus along the top of the timecard workspace allow you to make additional selections.
- **Right-clicking** - In certain circumstances, right-clicking is an alternative to using the menus.

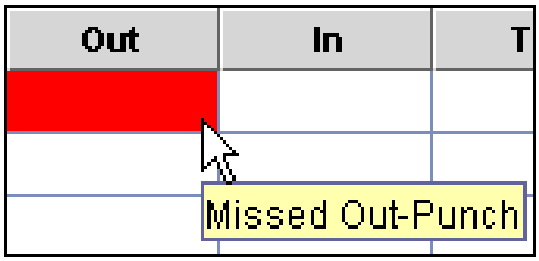
Phantom Punches

In the timecard workspace, you might see some punches that appear in purple. These are known as phantom punchbes. A phantom punch is added to a timecard by Workforce Timekeeper. If the punch has a gray background, you cannot edit it. If the punch does not have a gray background, you can edit it.

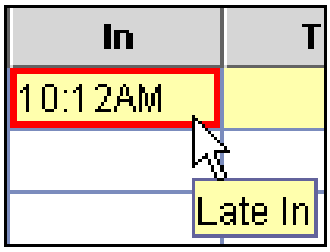
Identifying Exceptions

Exceptions are flags or markers that alert managers when employees work outside of their regular shifts. Possible exceptions include:

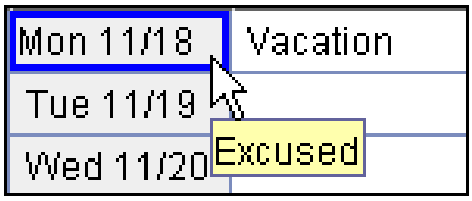
- Unscheduled
- Long interval
- Missing in-punch
- Missing out-punch
- In-punch: very early, early, or late
- Out-punch: early, late, or very late



Missed in-punch or out-punch



Late or early punch or an unexcused absence



Excused absence

- A solid red cell indicates a missed in-punch or out-punch.
- A red-outlined cell indicates an unexcused exception, such as a late or early punch, an absence, an unscheduled punch, or a core hour violation.
- A blue-outlined cell indicates an excused exception, such as vacation.

Adding Punches

You might find it necessary to add a punch; for example, if an employee forgets to punch in or out for shifts or breaks. You might also need to add a punch if an employee transfers from one labor account or work rule to another during the shift. When you add a punch, you can designate the associated labor account and specify an alternate work rule.

The timecard grid contains two sets of In and Out columns in which you enter punches. The two sets of In and Out columns allow you to enter more than one start and stop time; for example, if you punch out for a meal or break and then punch back in when you return to work.

You usually have a corresponding out-punch for every in-punch, although exceptions can exist.

Steps:
To enter your punches:

1. Click the first In cell across from the appropriate date and enter the time that you start work.
2. Click the first Out cell and enter the time that you end work. This time can be at the end of the day or for a break or lunch.
3. If you punched out for a break or meal, click the second In cell and enter the time that you returned to work.
4. Click the second Out cell and enter the time that you ended work.
5. Click **Save**.

Adding Durations Amounts (Project View Timecards)

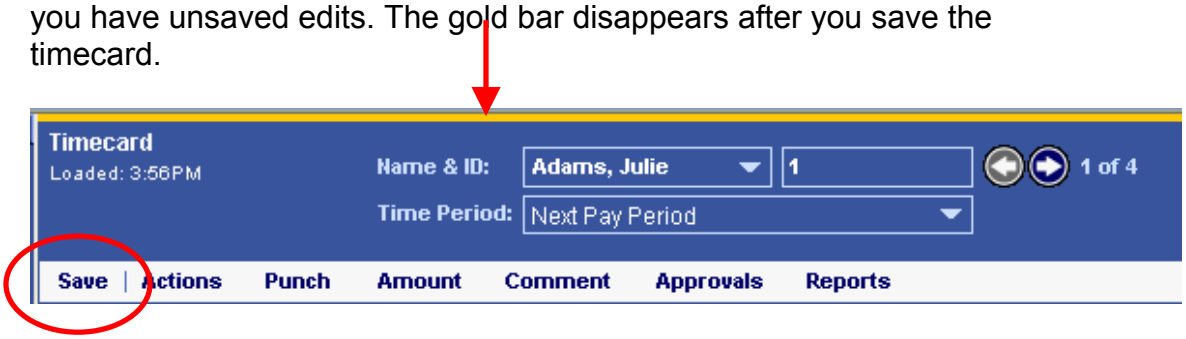
Durations amounts represent blocks of worked time that use work rules to determine how the time is allocated. Duration amounts have no start or stop times, and do not represent any specific type of time, like Regular or Vacation.

Steps:
1. Add a new row, if necessary.
2. Select **Hours Worked** from the Pay Code drop-down list, if adding a durations amount. (The assigned work rule is applied to the durations amount and the Totals window reflects any automatic deductions.)
3. Select a transfer from the Transfer drop-down list is the hour account.
4. Enter the amount into one or more appropriate date cells.
5. Click **Save**.

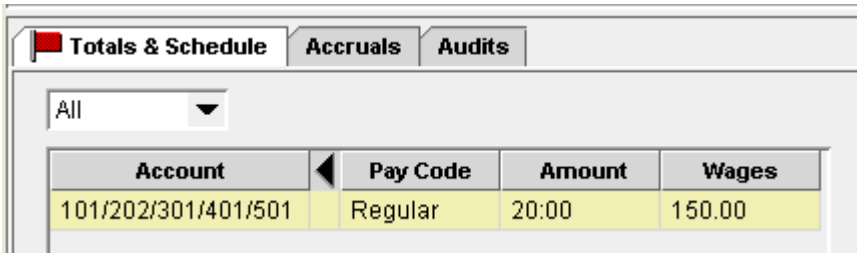
Saving Information

When you edit punches or amounts, Workforce Timekeeper provides the following graphic cues that indicate the timecard's changed state:

- The system adds a gold bar along the top of the timecard to indicate that you have unsaved edits. The gold bar disappears after you save the timecard.

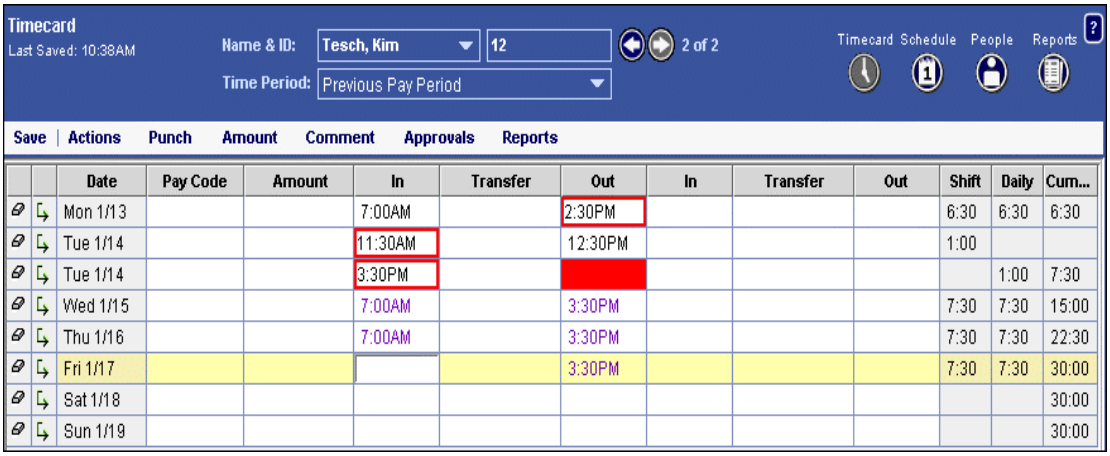


- The system adds a red flag to the Totals & Schedule tab, which lets you know that the timecard needs to be totaled.



Deleting a Punch

You can delete punches from an employee's timecard. For example, assume an employee forgets that he or she has already punched out and punches out a second time. You can delete the second punch from the employee's timecard to avoid confusion.



		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cum...
		Mon 1/13			7:00AM		2:30PM				6:30	6:30	6:30
		Tue 1/14			11:30AM		12:30PM				1:00		
		Tue 1/14			3:30PM							1:00	7:30
		Wed 1/15			7:00AM		3:30PM				7:30	7:30	15:00
		Thu 1/16			7:00AM		3:30PM				7:30	7:30	22:30
		Fri 1/17					3:30PM				7:30	7:30	30:00
		Sat 1/18											30:00
		Sun 1/19											30:00

Steps:
To delete a punch

1. Select the entire punch
2. Press the Delete key on your keyboard
3. The punch is immediately deleted from the workspace, but not from the database.
4. To delete the punch from the database, save the timecard.

Using Refresh

Information in a timecard or schedule comes from the database. If you have not saved you edits, the application cancels the edits and returns the information to the most recently saved information.

For example, assume that you add a pay code of eight hours of vacation to a timecard, and then realize that you do not want to apply the edit. Without saving the edit, select Actions>Refresh. In other words, think of Refresh as a way to undo changes you have just made on the page.

Steps:
To Refresh:

1. Make sure timecard is displayed.
2. Click Actions.
3. Click Refresh

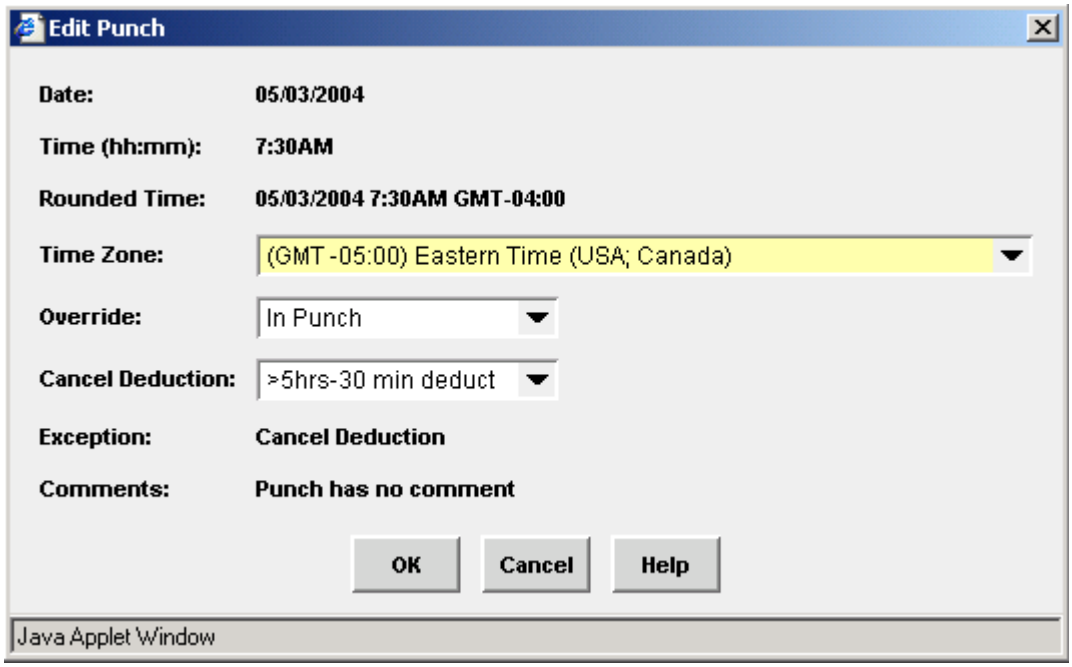
Editing Punches

To change certain characteristics of a punch, you need to access the Edit Punch dialog box to do the following:

- Change time zone
- Change punch status
- Cancel automatic meal deductions

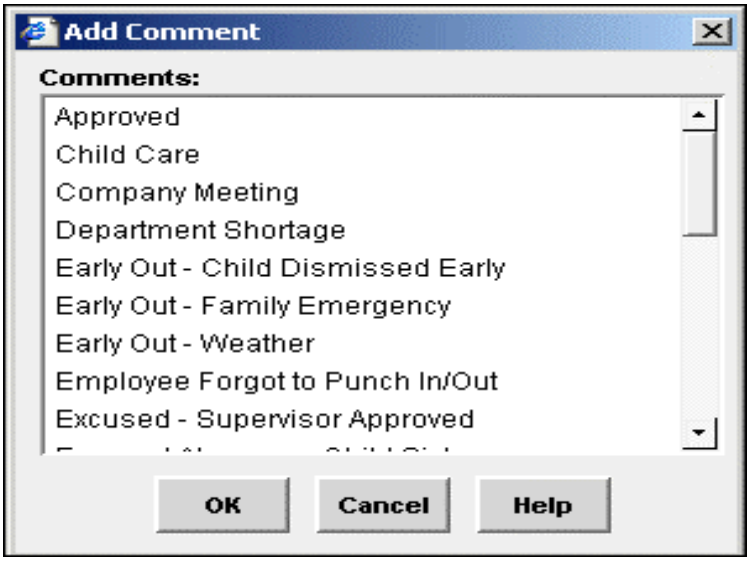
Steps:
Canceling automatic meal deductions

1. Open the Edit Punch dialog box by selecting **Punch -> Edit** or right mouse click the selected punch.
2. From the Cancel Deduction drop-down list, select the appropriate deduction.
3. Click **OK**.
4. Click **Save**.



Adding Comments

The Comments tab allows you to view all comments that are attached to punches or amounts in the active timecard. The tab at the bottom of the timecard workspace only appears if comments exist in the specified time period.



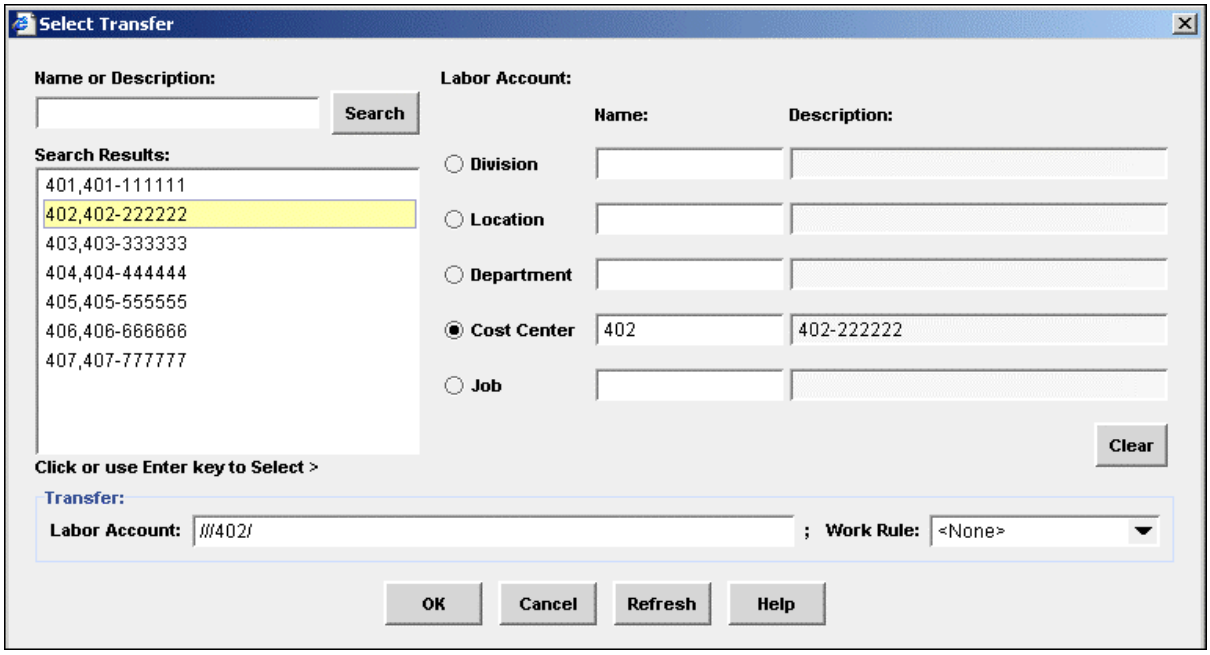
Steps:
To add a comment

1. Make sure the correct employee name appears in the Name & ID box and the correct time period appears in the Time Period box.
2. In the punch columns (In or Out), click the punch that needs a comment.
3. Select Comment > Add.
4. Select a comment from the Add Comment dialog box and click OK.
5. Click **Save**.

To remove a comment, select the comment from the Comments tab. Select **Comment>Delete**. Click Save.

Labor Account Transfers

The main labor account (sometimes called a cost center) in which an employee's worked hours accrue. When a supervisor adds an employee to the system, the supervisor assigns the employee a "home" account. Any hours worked by an employee are automatically charged to this account, unless hours are transferred or specifically allocated to another labor account.



Steps:
To transfer to a different labor account:

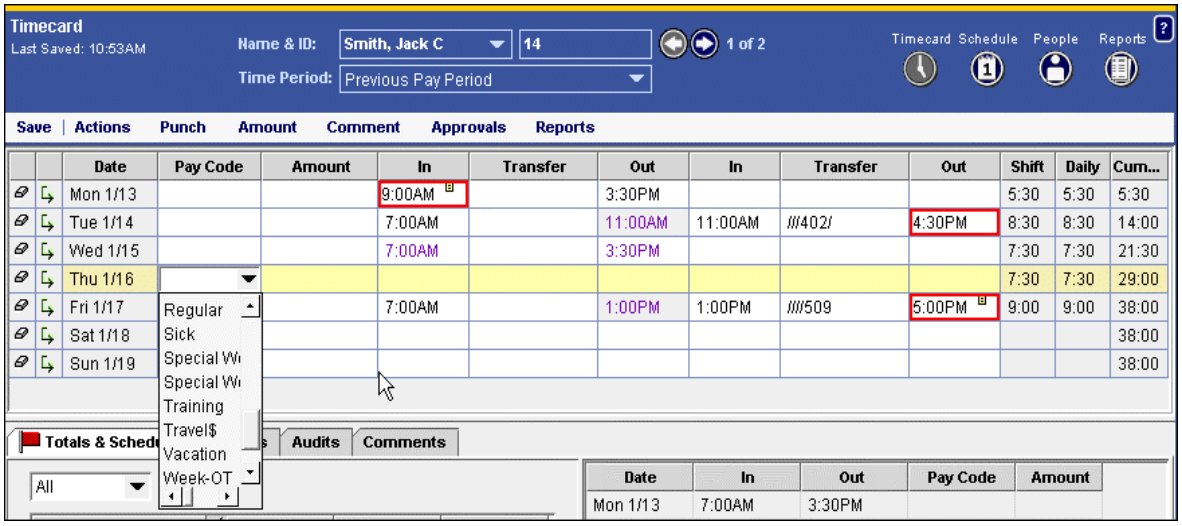
1. In the timecard grid, click the Transfer column on the row that is associated with the punch or amount to transfer. A drop-down list opens that shows the most recent transfers made. The actual number of transfers shown varies from company to company.

2. Select one of the following:
   - A labor account from the drop-down list.
   - The Search option, which appears at the end of the drop-down list. The Select Transfer dialog box opens. Enter the appropriate selection criteria and click OK.

When you transfer a labor account, you transfer the total range of time between the shift start and shift end to the account. The timecard grid supports up to two transfers in each row. To transfer your time to a different labor account more than twice in a given day, add a row under the day that you are currently editing and continue your entries.

When you enter a labor account transfer, the Workforce Timekeeper system automatically generates an out-punch to end the first part of the shift and enters the in-punch transfer to the new department in the In column. The in-punch carries the transfer information and the out-punch appears in purple type on a gray background; you cannot edit the out-punch.

Adding a Pay Code

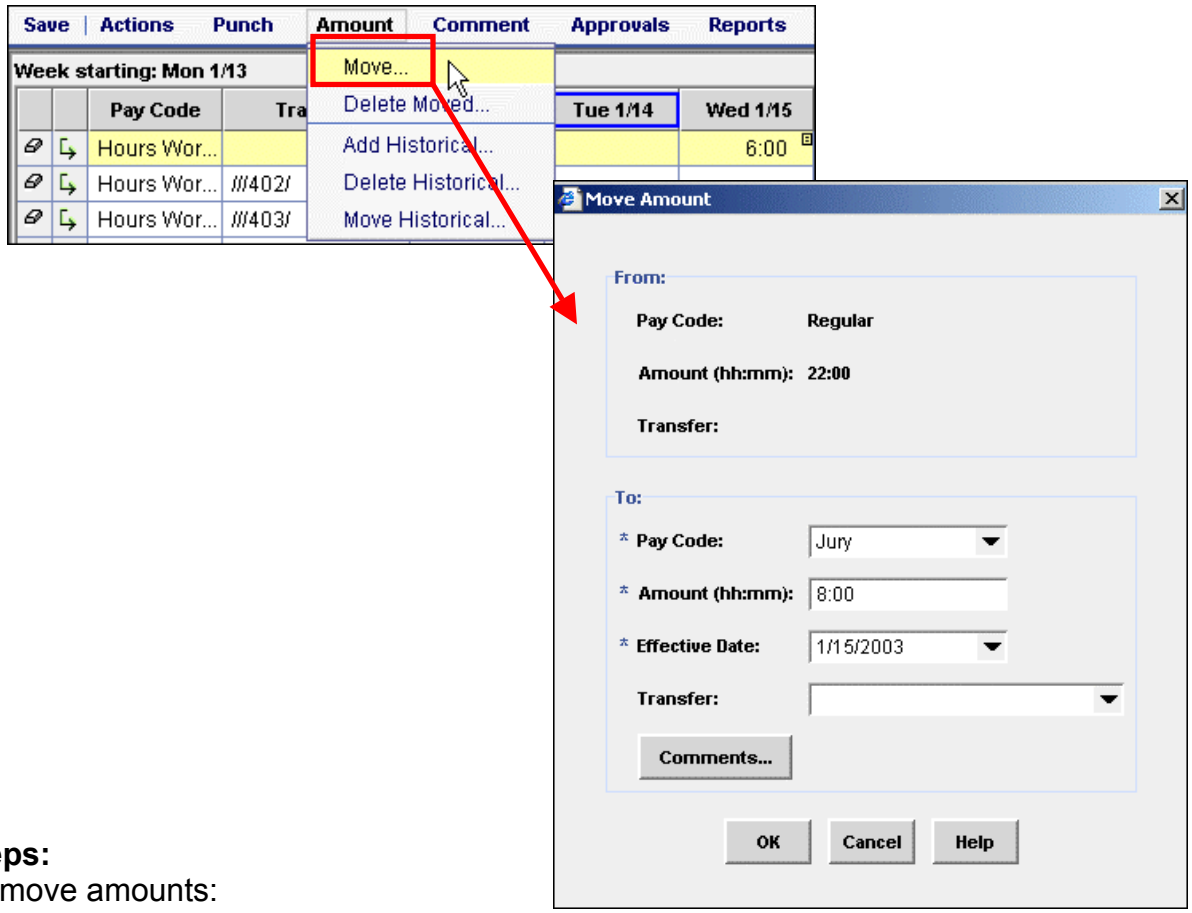


Steps:
To add a pay code amount:

1. Select an empty row or insert a row for the appropriate date.
2. Click the down-arrow in the Pay Code column, and select the pay code from the drop-down list.
3. Enter the number of hours in the Amount cell.
4. Click Save.

Moving Pay Code Amounts

Sometimes it may be necessary to move a pay code amount to correct an error or to handle something unexpected. For example, if an employee received a pay code amount of 7.5 Regular hours on his timecard, but the amount should have been allocated to the Jury pay code, then moving the amount will enable you to correct the discrepency.

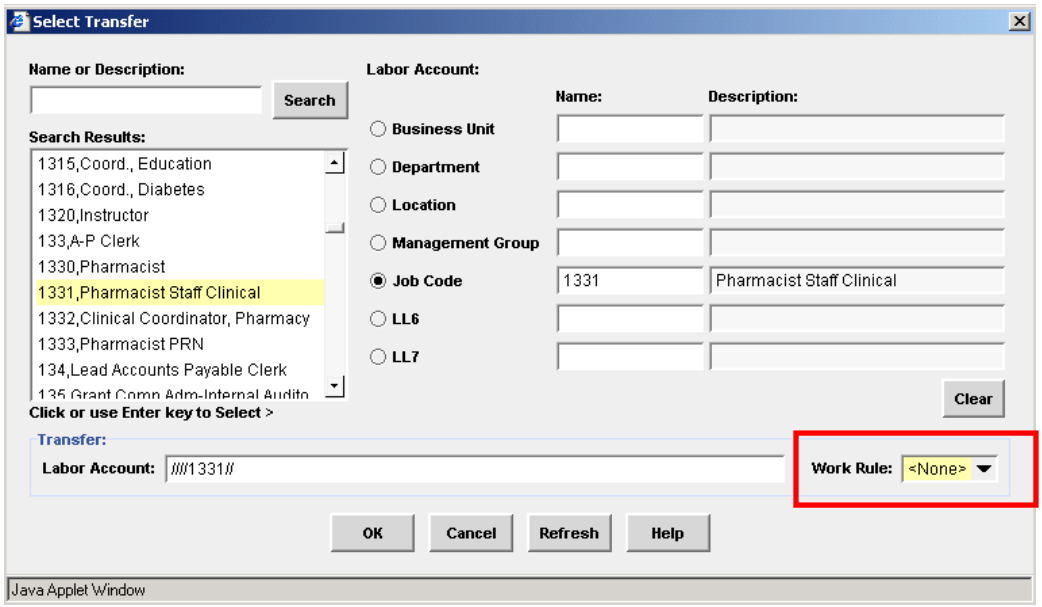


Steps:
To move amounts:

1. From the Totals and Schedule tab, select the amount that you want to move.
2. Select Amount, Move, or you can double-click the pay code amount that you want to move in the totals view of the Totals and Scheudule tab. The Move Amount dialog box opens with the From section filled in with the amount you selected in step 1.
3. Complete the To section of the Move Amount dialog box.
4. To add a comment to describe the pay code move amount, click **Comments** and complete the Add Comment dialog box.
5. Click **OK**.
6. Click **Save**. The move information appears in the Moved Amounts tab.

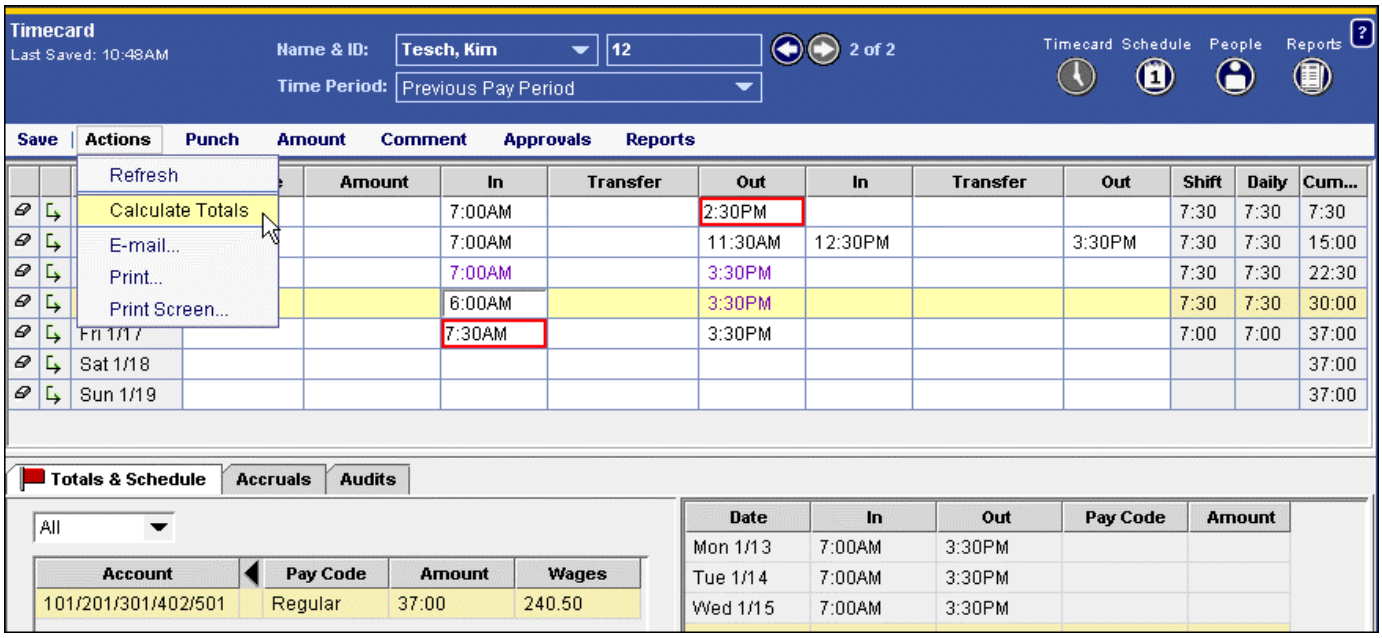
Applying Work Rule Transfers

A work rule transfer lets you apply a different set of rules to an employee's shift. For example, an employee is temporarily filling in for the Administration department and should be paid based on the Administration work rules, including meal breaks, rounding, and which exceptions are flagged. The work rule transfer ensures that the appropriate payroll rules are associated with the worked time.



Steps:
To apply a work rule transfer:
Click in the Transfer cell.
Click **Search** to open the Search Transfer dialog box,.
Form the Work Rule drop-down list, select the appropriate work rule.
Click **OK**.
Click **Save**.

Calculating Timecard Totals



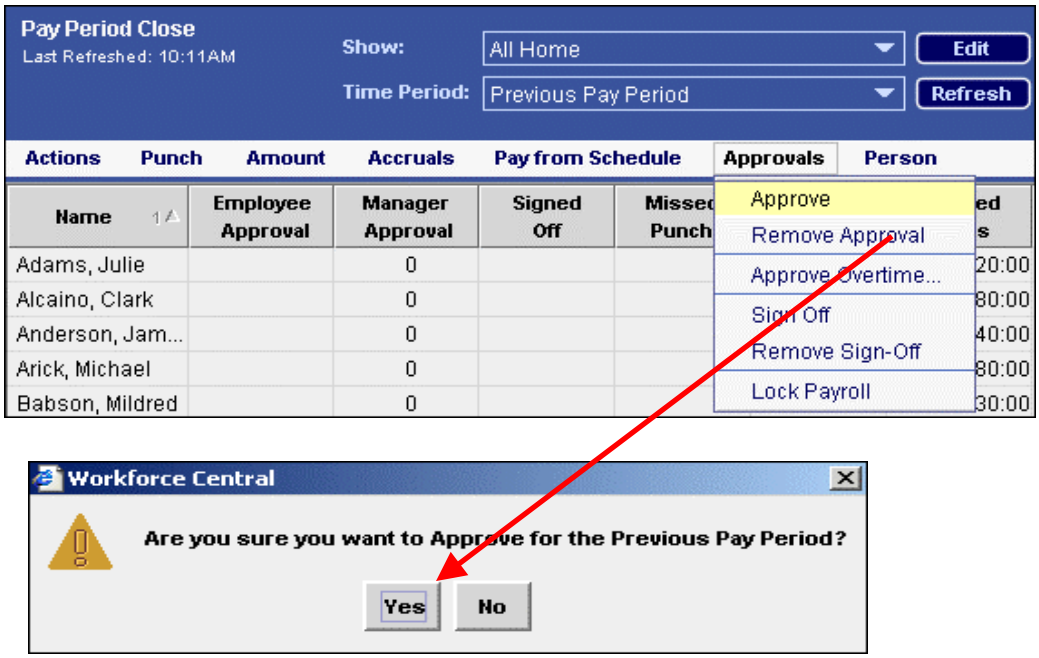
Steps:
To calculate timecard totals:

1. When you finish editing punches or amounts, select **Actions>Calculate** Totals.
2. Review the new totals, and then do one of the following:
   - If you do not want to save your edits, select Actions>Refresh.
   - If you want to save your edits to the database, select Save.

F. Approvals

Approving Timecards

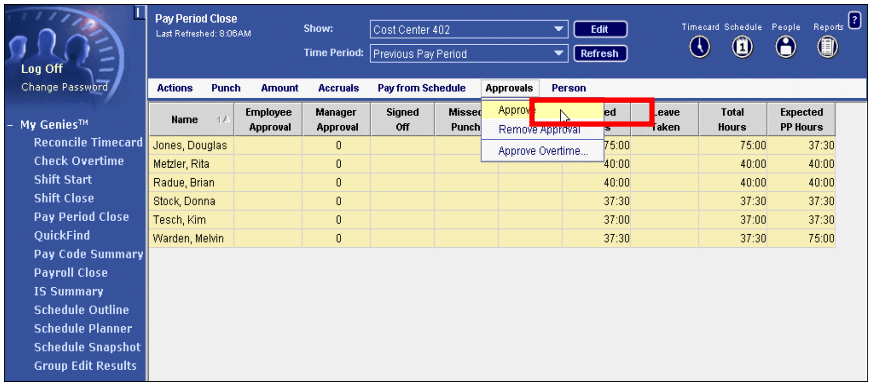
Approval is simply an indication of acceptance. Approvals allow managers and employees to indicate that the timecard is acceptable for payroll processing. Note that more than one manager can approve the time of employees for whom they are responsible.



Steps:

To approve an employee's timecard while viewing the timecard in the Timecard Editor:

1. Open the employee's timecard for the previous pay period.
2. Select Approvals>Approve.



To approve an employee's timecard from a Workforce Genie:

1. Select a Detail Genie, such as Pay Period Close.
2. Select Previous Pay Period from the Time Period drop-down list.
3. Select an employee from the Detail Genie workspace.
4. Select Approvals>Approve.

Steps:
To Print Timecard:

You can print the timecard in the following ways:

- Print the timecard, which includes all rows and columns, including those that can only be viewed by scrolling.

- Print the timecard workspace, which includes only those areas that are visible.

    1. Select Actions > Print.
    2. In the Print dialog box, click Print. The system prints the timecard grid and the section that is visible at the bottom of the workspace, for example, Totals, Accruals, Comments, or Audits. The system uses your default printer unless you change the printer setting in the Print dialog box.

G. Scheduling

Scheduling Genies provide tools you can use to do the following:

- Build schedules for individuals or groups of employees
- Create groups of employees who use the same schedule
- View schedules for the set of employees and time period you select
- Adjust schedules as needed

An employee's scheduled time is automatically charged to his or her home account. You can schedule pay codes and make pay code edits, or transfer time to another account or work rule as required. Scheduled pay codes and shifts can be automatically transferred to the employee's timecard so he or she can be paid from the schedule.

Schedule building blocks

Before you create schedules, determine the shifts and patterns you need. Then use the following building blocks to create and maintain schedules.

Shift - A span of time with a start and end time, usually in one day. For example, 9 A.M. to 5 P.M. Shifts can be divided into segments, which can contain labor level and work rule transfers. Segments can be any of the following:

- **Regular -** Work time charged to the home account.
- **Break -** Non-working time.
- **Transfer -** Time in a different work rule, labor account, or both.
- **Off -** Time associated with a work rule, such as when employees are scheduled to be on call. The amount they are paid depends on whether or not they are called in.
- **Unavailable -** Time that cannot be scheduled for work.

Pattern - One or more shifts, pay codes, or accrual amounts that repeat over specific days. For example, 9 A.M. to 5 P.M. Monday through Friday.
You can also create complex patterns; for example, employees can be scheduled to work 7a - 3:30p for two consecutive weeks and then 3:30p - 11p for one week. At the end of the third week, the pattern repeats.

Schedule Groups - A group of people who share the same schedule. Any employee included in the group inherits the schedule for the group.

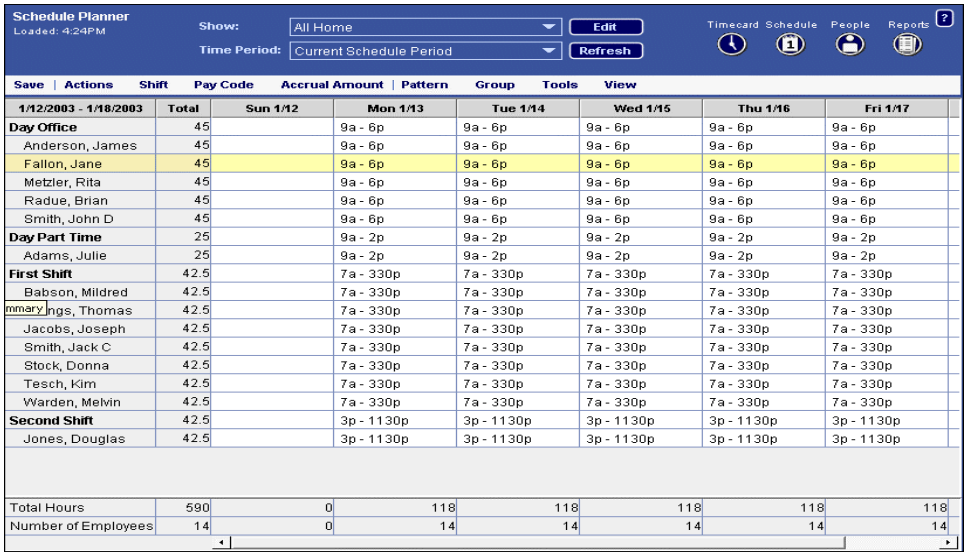
- When a schedule change occurs, you only need to make the change once for the group and all employees in the group inherit the change.
- If you need to make a temporary change, you can enter an ad hoc shift for the group rather than for each individual employee. The change to the schedule affects all employees in the group.
- If you have employees who change schedules during the year, you can use effective dates to assign an employee to a group in the future without affecting their current group assignment.

Employees in a schedule group inherit the schedule assigned to the group. You can assign patterns and shifts as well as pay codes to a group.

There are three Workforce Genies that apply to scheduling:

- **Schedule Planner**
- **Schedule Snapshot**
- **Schedule Outline**

Schedule Planner



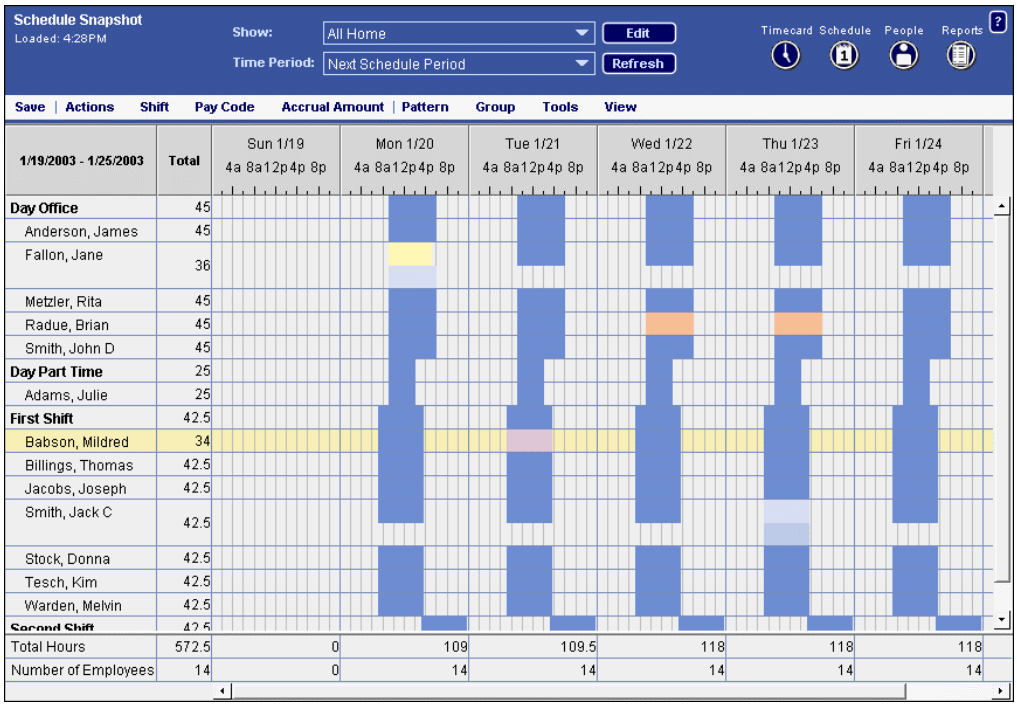
1/12/2003 - 1/18/2003	Total	Sun 1/12	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16	Fri 1/17
Day Office	45		9a - 6p	9a - 6p	9a - 6p	9a - 6p	9a - 6p
Anderson, James	45		9a - 6p	9a - 6p	9a - 6p	9a - 6p	9a - 6p
Fallon, Jane	45		9a - 6p	9a - 6p	9a - 6p	9a - 6p	9a - 6p
Metzler, Rita	45		9a - 6p	9a - 6p	9a - 6p	9a - 6p	9a - 6p
Radue, Brian	45		9a - 6p	9a - 6p	9a - 6p	9a - 6p	9a - 6p
Smith, John D	45		9a - 6p	9a - 6p	9a - 6p	9a - 6p	9a - 6p
Day Part Time	25		9a - 2p	9a - 2p	9a - 2p	9a - 2p	9a - 2p
Adams, Julie	25		9a - 2p	9a - 2p	9a - 2p	9a - 2p	9a - 2p
First Shift	42.5		7a - 330p	7a - 330p	7a - 330p	7a - 330p	7a - 330p
Babson, Mildred	42.5		7a - 330p	7a - 330p	7a - 330p	7a - 330p	7a - 330p
mmary ngs, Thomas	42.5		7a - 330p	7a - 330p	7a - 330p	7a - 330p	7a - 330p
Jacobs, Joseph	42.5		7a - 330p	7a - 330p	7a - 330p	7a - 330p	7a - 330p
Smith, Jack C	42.5		7a - 330p	7a - 330p	7a - 330p	7a - 330p	7a - 330p
Stock, Donna	42.5		7a - 330p	7a - 330p	7a - 330p	7a - 330p	7a - 330p
Tesch, Kim	42.5		7a - 330p	7a - 330p	7a - 330p	7a - 330p	7a - 330p
Warden, Melvin	42.5		7a - 330p	7a - 330p	7a - 330p	7a - 330p	7a - 330p
Second Shift	42.5		3p - 1130p	3p - 1130p	3p - 1130p	3p - 1130p	3p - 1130p
Jones, Douglas	42.5		3p - 1130p	3p - 1130p	3p - 1130p	3p - 1130p	3p - 1130p
Total Hours	590	0	118	118	118	118	118
Number of Employees	14	0	14	14	14	14	14

Schedule Planner is the primary workspace for scheduling tasks, and it is available to users with the necessary access rights. Schedule Planner lists employees and groups and their schedules for the time period that you select in the Show and Time Period boxes. The Total column displays the total number of hours for which individuals and groups are scheduled for the selected time period, as well as the number of employees and the sum of employee hours for the time period.

The date cells display either the shift start and stop times or the shift labels, and any pay codes for the employees and groups.

To add, edit, and delete shift information, you can use in cell editing or menu options. Or you can right-click a name or date cell and select an option from the shortcut menu. For most scheduling tasks, you can double-click an employee, a group, or specific day cell to activate the appropriate editor.

Schedule Snapshot

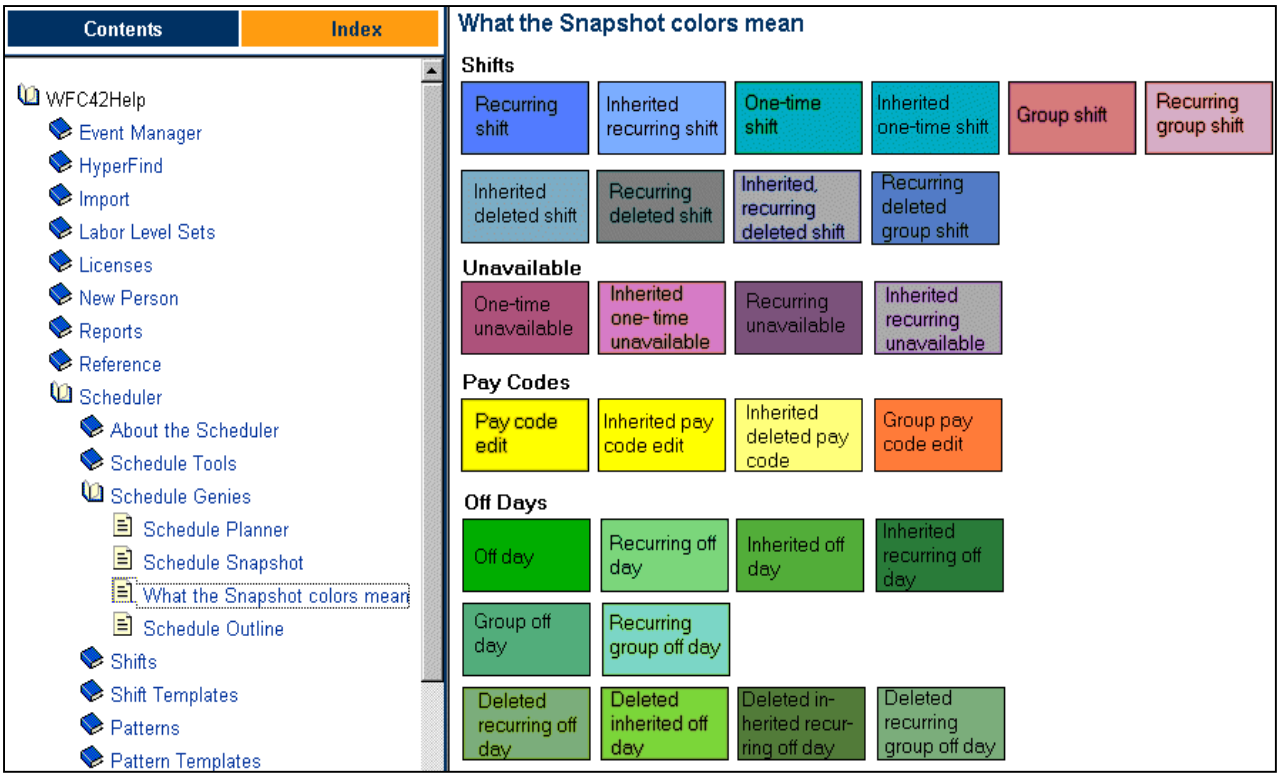


Schedule Snapshot is a graphical display of the schedule for individuals and schedule groups. Each bar represents a shift, pattern, or pay code. The best place to evaluate schedule coverage is in Schedule Snapshot.

The bar colors indicate the type of shift, pattern, or pay code. If you hold the mouse pointer over a bar, details of the shift or pay code appear. Character codes in the Snapshot view provide information, including whether there is a comment or transfer associated with the shift.

Schedule Snapshot displays the number of hours scheduled for each employee, schedule group, and day, as well as totals for the time period.
In cell editing is not available in the Schedule Snapshot, but you can access the Shift Editor, Pattern Editor, and Pay Code Editor using the menu options on the menu bar, or you can right-click an employee name, schedule group name, or date cell and select an option from the shortcut menu.

Schedule Snapshot Color Key



You can use online Help to find out what the Schedule Snapshot colors represent.

Using Scheduling Tools

Shift Editor

The Shift Editor allows you to add or edit shifts for an individual on a specific date, and assign attributes to the shift. Access the Shift Editor in one of the following ways:

In Schedule Planner or Schedule Snapshot, click a date cell for an employee or group, then select **Shift > Add**, **Edit**, or **Delete**.

In Schedule Outline, select an employee or group, then select **Shift > Add**, **Edit**, or **Delete**.

In Individual Schedule, select **Shift > Add**, **Edit**, or **Delete**.

Pay Code Editor

The Pay Code Editor lets you do the following:

- Add a pay code, such as leave time or a bonus, to an employee or group schedule
- Edit a pay code
- Delete a pay code

To open the Pay Code Editor in a Schedule Genie, select a date cell for an employee or group, then select **Pay Code > Add**, **Edit**, or **Delete**.

Shift Templates

A shift that is saved with a name so that it can be reused as needed; for example, 7a - 3p. Shift templates save time if you have employees who work the same standard shifts. Once your templates are created, you can apply them to individuals and groups from Schedule Planner.

Steps:

Applying a shift template to an employee or group:

1. In Schedule Planner or Schedule Snapshot, select the day cell to which you are assigning the shift template.
2. Select **Shift > Apply Template**.
3. In the Apply Shift Template dialog box, select the shift template you want to assign.
4. Click **OK**.
5. Select **Save**.

You can also apply a shift template using the **Shift Editor**.

Steps:

1. In Schedule Planner or Schedule Snapshot, click a date cell for an employee or group, then select **Shift > Add**.
2. In the Shift Editor, select a template in the Shift Template drop-down list, then click Copy.
3. Click **OK** to close the Shift Editor.
4. Select **Save** in the Schedule Genie.

Pattern Templates

A pattern template contains a series of shifts and/or pay codes that repeat over time. You name the pattern template, and then use it to assign a schedule to schedule groups or individuals.

Pattern templates are helpful if your company has:

- Established rotations, or patterns, to which employees are assigned when hired.
- More than one employee in your company who works the same pattern.

When assigning the pattern to the different employees, you can specify a different start date for each employee. This allows employees to work the same pattern but on a different rotation.

Example

Ann, John, Fred, and Sandra all work a pattern that rotates every four weeks. It includes the following shifts:

Week 1: 7 A.M. to 3 P.M.
Week 2: 3 P.M. to 11 P.M.
Week 3: 11 P.M. to 7 A.M.
Week 4: No scheduled shifts

You can add a pattern template with a rotation of four weeks that includes these shifts and assign it to Ann, John, Fred, and Sandra. If you hire a new employee for this pattern, you can simply assign the pattern with the appropriate start and end dates to create the new employee's schedule.

Steps:

1. Assigning a pattern to an individual or existing group:
2. In Schedule Planner, Schedule Snapshot, or Schedule Outline, select a group or employee, then select **Pattern > Add Pattern**.
3. In the Pattern Editor, select Insert Pattern.
4. Select a template in the Pattern Template drop-down list or click New to create a new pattern.
5. Select a Work Start Date, then select an End Date or Forever.
6. To create a temporary schedule for an employee or group that is already on a forever schedule, select the Override other patterns check box.
7. Click Apply to save the pattern and continue working in the Pattern Editor or click OK to close the Pattern Editor.
8. Select Save.

Example

Jane is assigned to a 7:00 A.M. to 3:30 P.M. Monday to Friday pattern that started on her date of hire. For the month of July, she will be working overtime for two hours each day. Jane's manager can create a new pattern of 7:00 A.M. to 5:30 P.M Monday to Friday, and assign it to Jane with a Work Start Date of July 1 and an End Date of July 31. She also selects Override other patterns. This means that after July 31, Jane returns to her Monday to Friday, 7:00 A.M. to 3:30 P.M. forever pattern.

H. Hyperfind Queries

About HyperFind

HyperFind allows authorized HyperFind users to create queries (searches) for people in Workforce Timekeeper. Department managers and supervisors use queries when generating reports, viewing and editing information, and setting up workflow notifications.

Examples of queries

- Finding people who are Workforce Managers
- Finding people who missed punches or who have not approved their timecard
- Finding people who were late or absent during the previous pay period
- Finding people with exceptions during the previous pay period

I. Group Edits Overview

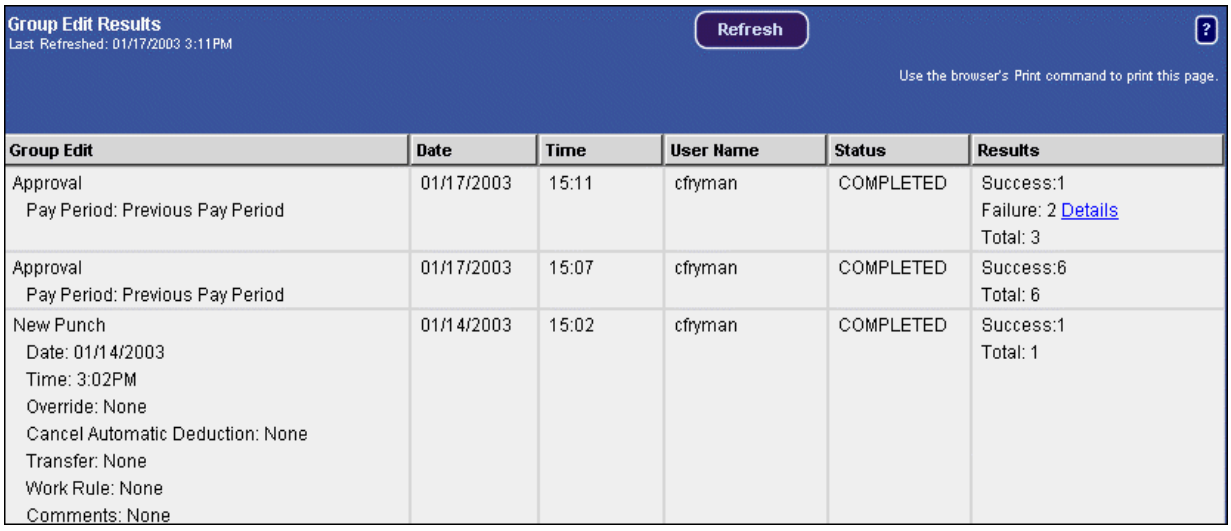
Group edits are changes that are made to more than one person record at a time using a Time and Attendance Genie.

For example, a few employees worked off site for a few days last week at a client's site. You need to add eight hours a day for each of them, and allocate the time to the client's job code.

Steps:
To perform a group edit:

1. Select a set of people from a Genie.
2. Click an menu bar to select from the available menu actions.
3. Click an action.
4. If a dialog box appears, enter the necessary information and click OK when finished.
5. If a confirmation box appears, click Yes.
6. To see the results of the group edit, select Group Edit Results from the navigation bar.

The edits are submitted at one time, and allows you to continue using the system while the edits complete in a background process. The results of a group edit are displayed in the Group Edit Results.

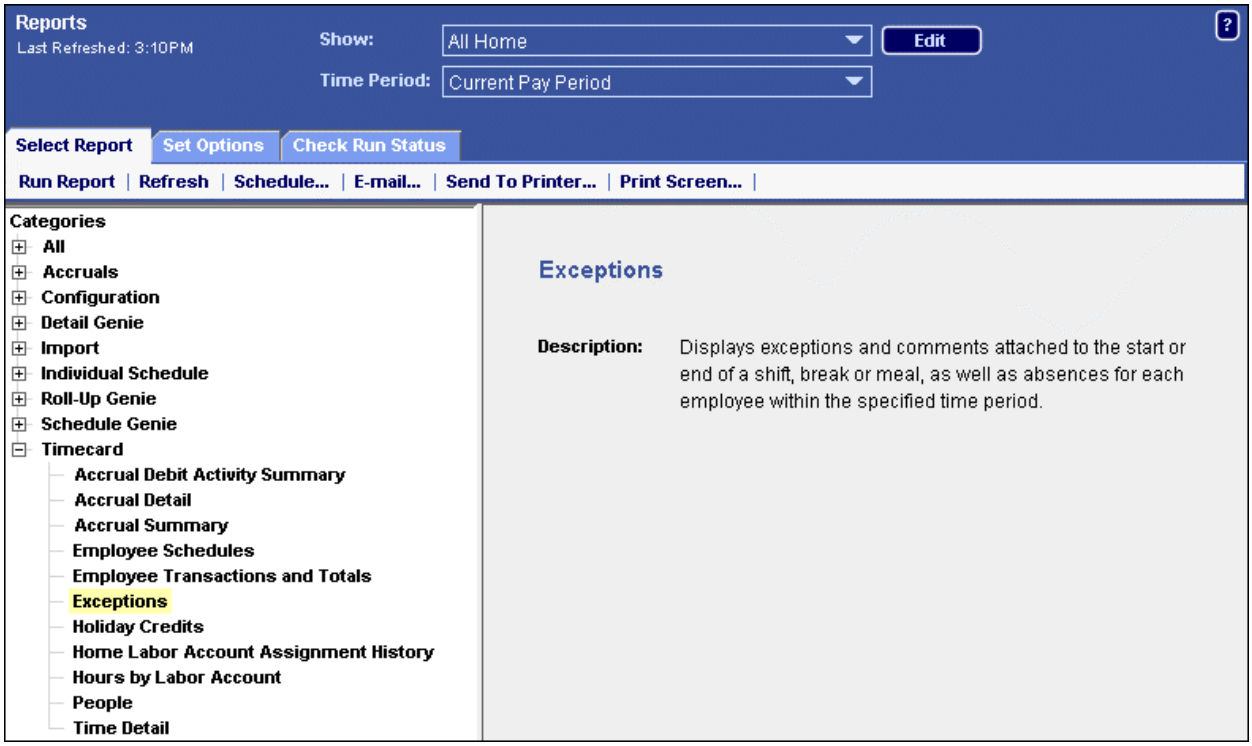


Group Edit	Date	Time	User Name	Status	Results
Approval Pay Period: Previous Pay Period	01/17/2003	15:11	cfryman	COMPLETED	Success:1 Failure: 2 Details Total: 3
Approval Pay Period: Previous Pay Period	01/17/2003	15:07	cfryman	COMPLETED	Success:6 Total: 6
New Punch Date: 01/14/2003 Time: 3:02PM Override: None Cancel Automatic Deduction: None Transfer: None Work Rule: None Comments: None	01/14/2003	15:02	cfryman	COMPLETED	Success:1 Total: 1

J. Reports

As a workforce manager, you can access the Reports function in two ways:

- Select Reports from the navigation bar.
- Click the Launch Reports icon from a Workforce Genie.



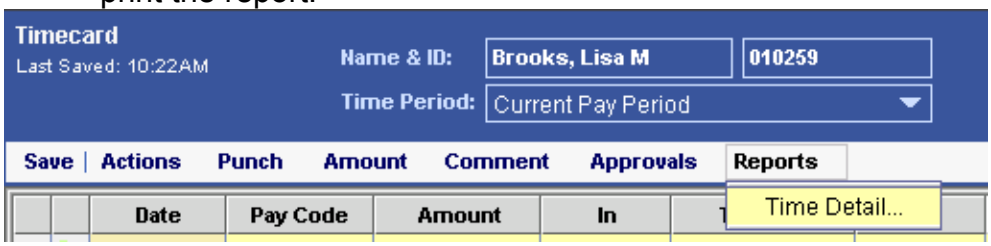
Steps to run a report:

1. Select a report.
2. Define which employees to include in the report.
3. Select a time period.
4. Set options (not available for all reports).
5. Choose Run Report.
6. Check the Run status.
7. View or print the report.

Some reports, like the Time Detail report are available from within a specific genie. The Time Detail report, which can be viewed or printed from the Timecard editor, includes exceptions and comments. The Time Detail report displays the selected employee's Time Detail report for the chosen time period.

To launch a Time Detail report for the current employee and the selected time period from the Timecard Editor:

1. Launch a timecard for an employee. Make sure to select the correct time period.
2. Select Reports -> Time Detail
3. Select File ->Print or click the Print button from the browser's toolbar to print the report.



Time Detail

Time Period: Current Pay Period
Dates: 5/02/2004 - 5/15/2004
Printed: 5/10/2004

Name: Brooks, Lisa M **ID:** 010259 **Pay Rule:** Pharm-B
Home Account: 010107090/017090/010/000/1760/0/0 4/04/2004 - No End

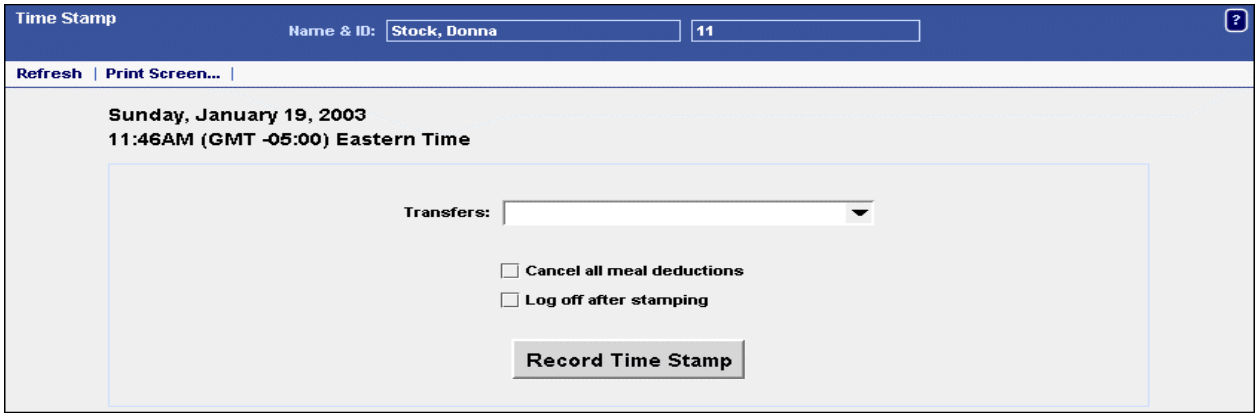
Date	Apply To	In Punch	In Exc	Out Punch	Out Exc	$Amt	Adj/Ent Amount	Totaled Amount	Cum. Tot. Amount	Absence
Sun 5/02									0.00	
Mon 5/03		[7:30AM]		4:00PM				8.00	8.00	
Tue 5/04		[7:30AM]		[6:00PM]	LV			10.00	18.00	
Wed 5/05		6:30AM	EV	5:00PM	LV			10.00	28.00	
Thu 5/06		7:00AM	EV	5:30PM	LV			10.00	38.00	
Fri 5/07		[7:30AM]		[5:00PM]	LV			9.00		
Fri 5/07	Vacation						8.00		55.00	
Sat 5/08									55.00	
Sun 5/09									55.00	
Mon 5/10									55.00	Absent
Tue 5/11									55.00	
Wed 5/12									55.00	
Thu 5/13									55.00	
Fri 5/14									55.00	
Sat 5/15									55.00	
Totals						0.00	8.00	47.00	55.00	

Pay Code	Money	Hours
010107090/017090/010/000/1760/0/0		
Reg		39.50
RegNgt-B		0.50
OT		7.00

Pay Code	Money	Hours
Reg		39.50
RegNgt-B		0.50
OT		7.00
Totals	0.00	47.00

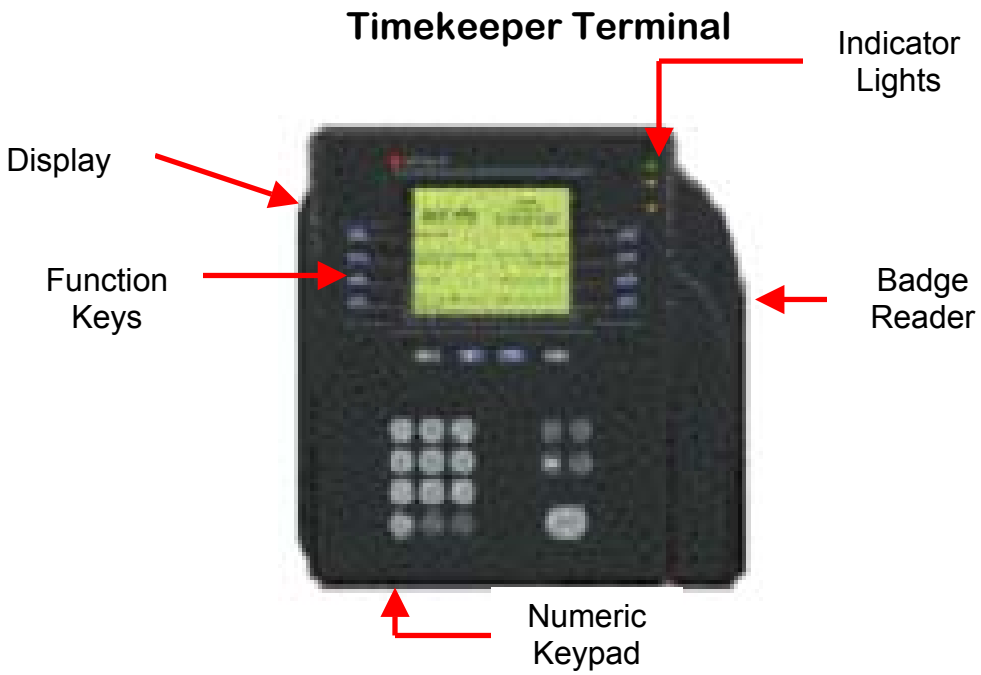
K. Time Entry Methods

Employee Time Stamp



The Workforce Employee Time Stamp view uses the PC as a data collection device. Employees open the Time Stamp view and click Record Time Stamp to capture their worked time. They do not need to specify whether their time stamp is an in-punch or an out-punch; the status is assigned according to their work rule and pay rule.

The Time Stamp view can also provide options for employees to transfer hours to a different job or task and log off immediately after stamping.



Information is sent from the Timekeeper Terminal to the Workforce Timekeeper database, and from the database to the Timekeeper Terminal.

Which function keys you access and how the information is captured at the Timekeeper Terminal depends on the definitions used in your access profile.

L. Conclusion/Wrap Up:

You should now be familiar with:

- Basic Workforce Timekeeper functions and terminology.
- Navigational concepts.
- Using Workforce Genies to locate people for editing sessions.
- Applying edits and approvals to timecards.
- Printing timecards.
- Applying group edits to more than one employee.
- Generating reports.
- Identifying the different time entry methods.

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