Workforce Timekeeper™ v8.0
Managing Timecards and Schedules for
Train-the-Trainer

Task Guide
The information in this document is subject to change without notice and should not be construed as a commitment by Kronos Incorporated. Kronos Incorporated assumes no responsibility for any errors that may appear in this manual. This document is for the use of the intended recipient, and it may not be reproduced in whole or in part or used for any other purpose than that for which it was provided without the prior written permission of Kronos Incorporated. Copyright, Kronos Incorporated or a related company, 2016. All rights reserved.


IBM, eServer, and iSeries are trademarks of International Business Machines Corporation. StandardsPro® is a registered trademark of H.B. Maynard and Company, Inc. Vortex and Vortex Mobile Scheduler Connect are trademarks of Vortex Connect. Citrix is a registered trademark of Citrix. All other product and company names mentioned are for identification purposes only, and may be trademarks of their respective owners.

When using and applying the information generated by Kronos products, customers should ensure that they comply with the applicable requirements of federal and state law, such as the Fair Labor Standards Act. Nothing in this Guide shall be construed as an assurance or guaranty that Kronos products comply with any such laws.

These training materials are provided for general educational purposes and are not intended to convey legal, accounting, or regulatory compliance advice. Such advice can only be obtained through your own attorney, certified public accountant or other qualified professional, with full knowledge of your organization's particular operations, circumstances and policies. Readers are encouraged to consult with appropriate professional advisors concerning their individual circumstances before making decisions affecting their business operations. Last updated January 8, 2016.

Kronos KnowledgePass™ subscription is designed to be your pre-training, post-training, and refresher skills destination. Kronos KnowledgePass contains tutorials, learning snippets, job aids, and much more to support the training you receive from Kronos-certified instructors. Kronos KnowledgePass education support materials stream right to your desktop and are all available 24/7.

To find out if your organization subscribes to Kronos KnowledgePass, speak to the individual responsible for the Kronos solution at your organization. If you are not a subscriber and you are interested in Kronos KnowledgePass, please give us a call at 888 293 5549.

Published by Kronos Incorporated
297 Billerica Road, Chelmsford, Massachusetts 01824-4119
Phone: 978-250-9800, Fax: 978-367-5900
Kronos Incorporated Global Support: 1-800-394-HELP (1-800-394-4357)

Workforce Timekeeper 8.0
Managing Timecards and Schedules
Document Revision History

<table>
<thead>
<tr>
<th>Document Revision</th>
<th>Product Version</th>
<th>Release Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Workforce Timekeeper 8.0</td>
<td>July 2015</td>
</tr>
<tr>
<td>B</td>
<td>Workforce Timekeeper 8.0</td>
<td>January 2016</td>
</tr>
</tbody>
</table>
# Table of Contents

Using the Workforce Timekeeper Interface ................................................................. 1

**Basic Navigation** ........................................................................................................ 2
  - Logging On .................................................................................................................. 2
  - Using the Inactivity Timeout ..................................................................................... 3
  - Signing Out ................................................................................................................ 4
  - Using Your Navigator ................................................................................................. 5
  - Managing the Active Workspace ............................................................................. 7
  - Opening Workspaces and Widgets ......................................................................... 8
  - Widget View Options ................................................................................................. 9
  - Using the Search Widget .......................................................................................... 11
  - Accessing Support in the Application ..................................................................... 13

**Monitoring Timecards to Facilitate Payroll Processing** .............................................. 14

**Reviewing Notifications of Time Data** ..................................................................... 15
  - Using the Exceptions Alert and Widget .................................................................... 15
  - The Exceptions Widget ............................................................................................ 16

**Resolving Exceptions in the Exceptions Widget** .......................................................... 18
  - Action Buttons in the Exceptions Widget ................................................................. 18
  - Resolving Punch Issues ......................................................................................... 19

**Reviewing Exceptions in Hourly and Project Timecards** .............................................. 24

**Accessing Hourly Timecards** .................................................................................... 25
  - Accessing Timecards via the View Timecard Link in the Exceptions Widget Details View .................................................................................................................. 25
  - Accessing Timecards via a Genie ........................................................................... 25
  - Accessing Timecards via GoTo Navigation .............................................................. 25

**Analyzing and Resolving Exceptions in Hourly Timecards** ...................................... 28
  - Saving Changes to Information in the Timecard View .......................................... 28
  - Calculating Totals Before Saving Changes ............................................................... 29

**Transferring Employees** ........................................................................................... 30
  - Using the Transfer Field .......................................................................................... 30

**Reviewing Timecard Data** .......................................................................................... 32

**Accessing Employee Data Using Workforce Genies** .................................................. 33
  - The Genies Widget .................................................................................................. 33
  - Filtering within Genies ......................................................................................... 33
  - Sharing Data in a Workforce Genie ....................................................................... 34

**Running and Viewing Reports** ................................................................................... 36
  - Running a Report ...................................................................................................... 36

**Finalizing Timecards** .................................................................................................. 37

**Approving Employee Timecards** ............................................................................... 38
  - Approving Employee Timecards Using the Approval Wizard ................................ 38
  - Removing your Approval ...................................................................................... 39

**Appendix** .................................................................................................................... Error! Bookmark not defined.
Using the Workforce Timekeeper Interface .................................................................40

Basic Navigation .........................................................................................................41
  Searching for Employees Using the QuickFind Genie .............................................41

Monitoring Timecards to Facilitate Payroll Processing .............................................43

  Resolving Exceptions in the Exceptions Widget .........................................................44
    Justifying an Employee’s Missing Time .................................................................44
    Canceling a Meal Deduction ..................................................................................45

Finalizing Timecards ..................................................................................................46

  Signing Off Employee Timecards (Managers Only) ................................................47
Using the Workforce Timekeeper Interface
Basic Navigation

Logging On

The Workforce Central logon page provides access to all features in the Workforce Timekeeper application to which you have been given access.

To access Workforce Timekeeper, enter your organization’s unique Workforce Central Uniform Resource Locator (URL) in a standard browser. Then enter a user name and password on the logon page.

Note

Check with your Workforce Timekeeper application administrator for your organization's specific Workforce Central URL.

Password requirements, such as required characters and case-sensitivity, vary according to organizational needs. Check with your Workforce Timekeeper Application Administrator for your Workforce Central user name and password, and to identify your application’s password requirements.

Logging on to Workforce Timekeeper
1. Access the Navigator log on page.
2. Enter your user name and password in their designated fields.
3. Click the right-facing arrow or press the Enter key on the keyboard.
   Your navigator appears.
Using the Inactivity Timeout

The inactivity timeout screen appears if there is no user activity, such as saving or searching, for a set length of time.

When the timeout warning appears, click **Yes** to continue. If you are finished with your session, click **No**.

![Warning]

**Note**

Your organization’s application administrator can configure the inactivity timeout by adjusting the Session Timeout parameter.

**Recommended Practice**

Be sure to click **Yes** if you want to remain logged in.

If you do not click **Yes** after receiving the inactivity timeout message, you will be logged out of the application and will lose all unsaved edits.
Sign Out

Signing Out of Workforce Timekeeper:

- Closes your session
- Signals to the application that you no longer require access to any of its components
- Prevents other people from accessing your information

To log off Workforce Timekeeper, click the Sign Out link.

Recommended Practice

Kronos recommends that you always end your work session by clicking the Sign Out link, located in the top-left corner.

Clicking Close (x) without first logging off might leave your connection to the application open, allowing unauthorized people to view and edit information.

Tip

Save the Workforce Central URL as a “favorite” in your web browser for quick access.
Using Your Navigator

After you log on to the application, your Navigator appears. Navigators are customized views of the information that is important to completing daily work tasks in the application. All navigators include a home workspace that is displayed when you first log on. Workforce Central includes Navigator templates that are assigned based on user licenses. There are templates for employees, managers, managers who are also employees, and administrators. The templates can be used as is, or copied and modified as necessary.

Parts of a Navigator

Navigators have many different parts. Each part of a navigator either provides you with information or helps you to perform a task.

<table>
<thead>
<tr>
<th>Screen Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Bar</td>
<td>A horizontal area at the top of the navigator that displays the currently opened workspaces as tabs. Click a tab to bring a workspace into focus. Click the Refresh icon next to the title to reload the workspace with its default information.</td>
</tr>
<tr>
<td>Name/Sign Out</td>
<td>Identifies the user and provides a link to log out of navigator. Your photo may also appear here.</td>
</tr>
<tr>
<td>Screen Area</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Alerts</td>
<td>Links, which appear as icons, enabling you to quickly view the type and number of tasks and issues that require your immediate attention. (Note: Alerts are optional)</td>
</tr>
<tr>
<td>Carousel</td>
<td>Container for one or more workspaces (Note: Carousel appears only if you have been assigned another workspace in addition to your home workspace.)</td>
</tr>
<tr>
<td>Search</td>
<td>Click to open the Search widget, to locate employees and their information.</td>
</tr>
<tr>
<td>Workspaces</td>
<td>A work area made up of one or more views and the Related Items pane.</td>
</tr>
<tr>
<td>Views and Widgets</td>
<td>A workspace can have one or more pre-sized views. Views are holding areas for widgets, which are the task-oriented tools you use to review data and perform actions. In this example, there are two views, and each one currently holds a widget. When you need to work with a different widget, you can swap it into either view, replacing the current occupant.</td>
</tr>
<tr>
<td>Related Items Pane</td>
<td>Includes one or more additional widgets that are part of the workspace; the Related Items pane contains different widgets for each workspace.</td>
</tr>
</tbody>
</table>
Managing the Active Workspace
You can change your view of the information in the workspace or associated widgets.

Primary and Secondary Widgets
All workspaces have at least one primary view, and some also have one or more secondary views. Normally, to work in a widget you must move it into a primary view. Widgets occupying secondary views often provide useful information, but are not fully functional until moved into a primary view.

Multiple Primary Views
Some workspaces feature two equally-sized views in a side-by-side or top-and-bottom layout. In this case, both views act as primary views, and widgets in those views are fully functional.

Repositioning Widgets
Move a secondary widget into a primary position by clicking the title bar, dragging it over the primary widget, and releasing.

Hovering for Details
Hover the mouse to see a tool tip containing details, where applicable.

Contextual Callouts
Right-click a cell within a widget; in many cases, this opens a callout with detailed information and icons for any actions you are allowed to perform on that cell.

Using the GoTo Control
Depending on how your navigator is configured, you may be able to perform further actions on the entries in a widget. If your navigator has a GoTo control configured, you may be able to select one or more employees, click the GoTo control, and then access the employees’ timecards, the Schedule Planner, or another Workforce Central page where you can perform an action.

Workspace Tabs
Each active workspace gets its own tab. You can switch back and forth between workspaces by selecting the tab you want to view. You must always have at least one workspace open, but you can close any additional workspaces by hovering over its tab and clicking the Close (X) button.
Opening Workspaces and Widgets
Opening different workspaces provides access to different sets of widgets.

**Opening Workspaces**
If you have been assigned more than one workspace, you can:

- Access all available workspaces by clicking the carousel.
- Use the arrows to toggle between available workspaces.
- Click a workspace to make it active.
- Click the X in the workspace tab to close the workspace (other than your default workspace).

**Additional Workspaces**
Click an item in the carousel to open an additional workspace. To close that workspace later, hover over its tab and click the Close (X) button.

**Closing the Carousel**
Click the Workspaces tab to close the carousel.

**Cycling the Carousel**
If there is more than one workspace in the carousel, use the arrows to cycle through the additional workspaces.

**Opening Widgets**
Within any workspace, you can access widgets and activate them by bringing them into your active workspace. To open a widget:

- From the Related Items pane, select a widget OR click a widget and drag it into your active workspace.
- To remove the widget, click the gear icon and click Close.
There are several ways to adjust the view or preferences of a widget to better suit your needs while you work through tasks.

### Activating a Widget
There are two ways to activate a widget in the Related Items pane:
- To add it to the current workspace, drag it out of the pane and release it over a widget in the workspace.
- To work with the widget in a temporary workspace, click the widget while it is still in the pane. To close that workspace later, hover over its tab and click the Close (X) button.

### Widget View Options

<table>
<thead>
<tr>
<th>Gear Icon</th>
<th>Preferences Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click to view options for moving the widget. Unavailable options will be grayed out. (For example, widgets in the primary view cannot use Close or Pop-out.)</td>
<td>Select Preferences to edit settings for a widget, such as time period, and permanently save the changes. Preferences, if enabled, are saved only for your use in your own widget.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resize Bar</th>
<th>Pop-out Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click and drag the resize bar to reveal more of a particular secondary view.</td>
<td>Select Pop-out to promote a secondary widget to a primary position.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title Bar</th>
<th>Close Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click and drag a widget’s title bar to swap it with another widget or return it to the Related Items pane.</td>
<td>Select Close to send a widget in a secondary view back to Related Items.</td>
</tr>
</tbody>
</table>
Maximize/Restore Icons
Click to expand a widget in a primary view to its maximum size. (This will temporarily hide any other widgets.) Click again when maximized to restore to the original size.
Using the Search Widget

Employee search allows you to quickly locate information about employees, locations, and jobs in Workforce Central. In addition, Employee Search evaluates your search text and offers suggestions that are possible matches for the information you are searching. When you find the employee or other information you are seeking, you can frequently drill down to a deeper level of information.

If a Search widget has been configured for you, it will appear in the upper-right corner of the navigator. Enter part of an employee’s name and Search offers potential results that fit your criteria. For example, when you enter “jo”, your search returns:

- A list called People. These are the employees who have those letters at the beginning of either their first or last name.
- A list called Who have. This category contains a list of people who have an assigned manager with the search letters in either their first or last name.
- A list called Were you looking for. This category contains possible items you may have been looking for that contain the letters entered in search.

Performing Actions on the Items in the Results Pane

Depending on how your navigator is configured, you may have several options for performing further actions on the entries in the Results pane. If your navigator has a GoTo control configured, you may be able to select one or more employees, click the GoTo control, and then access the employees’ timecards, the Schedule Planner, or another location where you can perform an action.

Hints

The Hints feature displays a drop-down list that contains categories that employees are assigned to. For example, to obtain a list of employees who have unexcused absences in the current pay period, from the drop-down list select Absence Unexcused > True. Then review the data in the Results pane.

Searching for an Employee Using Search

1. Click the Search icon.
2. Select an option to turn the Hints feature on or off.
3. In the Search field, enter at least the first three letters of the employee’s first or last name. For example, jon.
4. Click an entry to display more information in the Results pane. The information shown for the employee includes the employee name, badge number, contact information, job details, pay rules, and profiles assigned to that employee.
5. While viewing an employee’s information in the Results pane, you can select GoTo Control to move to a different Workforce Central location.
<table>
<thead>
<tr>
<th><strong>Contact Info</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phone 1:</strong></td>
<td>978-123-1234</td>
</tr>
<tr>
<td><strong>Phone 2:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Phone 3:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Email Address:</strong></td>
<td><a href="mailto:bjones@company.com">bjones@company.com</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Job Details</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Base Wage:</strong></td>
<td>50.00</td>
</tr>
<tr>
<td><strong>Primary Job:</strong></td>
<td>Olson PayMC</td>
</tr>
<tr>
<td><strong>Labor Account:</strong></td>
<td>1/233/4/408/546</td>
</tr>
<tr>
<td><strong>Hire Date:</strong></td>
<td>4/05/1999</td>
</tr>
<tr>
<td><strong>Employment Status:</strong></td>
<td>Active</td>
</tr>
<tr>
<td><strong>Seniority Date:</strong></td>
<td>4/05/1999</td>
</tr>
<tr>
<td><strong>Reports To:</strong></td>
<td>Supt./Pit.</td>
</tr>
</tbody>
</table>

1 results during Current Pay Period as of 12:15 PM
Accessing Support in the Application

Workforce Central offers the following support resources:

- KnowledgePass
- Online Help

If you have access to KnowledgePass and Online Help, you can access these links in the Related Items pane.

Using KnowledgePass

KnowledgePass provides just-in-time training—or refresher training—for tasks specific to your job role. KnowledgePass content covers a range of topics and tasks and includes tutorials, job aids, and practice simulations. It is available to organizations that subscribe to KnowledgePass.

If configured, KnowledgePass opens in a new tab and brings you to your My Learning page. This page provides access to all of the courses that have been assigned to you in the My Learning block.

Using Online Help:

Online Help is your tool for on-the-job support.

- Use the Contents tab to scan through the table of contents for the applications(s) in the suite that you are using.
- Use the Search tab to search for a specific topic of interest.
- If desired, click Maximize to gain more space on the screen. Click Restore Down to return the widget to its original size.
Monitoring Timecards to Facilitate Payroll Processing
Reviewing Notifications of Time Data

Using the Exceptions Alert and Widget

The Exceptions widget can help you to manage employee time data exceptions quickly and efficiently. You can access the widget using the following methods:

- Clicking the Exceptions alert; this activates the Exceptions widget and moves the data to an open workspace.
- Clicking and dragging the Exceptions widget to the open workspace.
- Clicking the widget to open it in a temporary workspace.

The Exceptions Alert

The Exceptions alert quickly draws your attention to time data issues in timecards for hourly employees. It is:

- An optional configuration.
- Applicable only to hourly employees who have triggered a time data exception that requires your attention.
- Available when you log in; it displays an alerts indicator in the top center or your navigator.

Time data exceptions alerts can notify you about issues such as missed punches, late or early in punches, and late or early out punches that require your immediate attention.

The alert icon includes a number in the upper-right corner that tells you how many employees have time data issues.

Select an employee from the list to access the Summary and Details views of the exceptions widget. When you click an employee’s name, you are brought to the Details view of the Exceptions widget.

Refresh

Click the Refresh icon to get immediate updates to your alerts.

Alert Icons

Each type of alert has its own icon. A number in the icon’s corner indicates that there are items you should review. Click an icon to view details.

Alert Details

Click an item in the details of an alert to open the relevant widget. You can then take whatever actions are needed in the open widget.

View All

Click to open the Alerts and Notifications widget. This provides more room for reviewing alerts, and may also include uncategorized alerts and notifications that are not actionable.
The Exceptions Widget

The Exceptions widget is a specialized widget that displays exception data for hourly employees or employees who punch in and out to track their worked time. Managers can perform most of the tasks they need to accomplish on their employees’ time data in the Exceptions widget. Some of the key functions that can be performed in the detail view include:

- Add and remove punches
- Add comments
- Mark exceptions as reviewed
- Change an employee’s time to their normally scheduled time

Note

The exceptions widget displays time data exceptions for hourly employees only. There are two views in the widget: Summary and Details.

Exceptions Summary View

The Summary view:

- Provides an at-a-glance view of employee exceptions
- Displays one or more exception types by column
- Allows your organization to configure the columns based on your business requirements
- Displays exceptions by employee

Selecting an employee activates the Details button, which allows you to view details for one employee at a time. When you hover over any column, the Details button is enabled. Selecting the Details button allows you to view details for all employees who have that type of exception.

Details View

The Details view is populated only when an employee has an exception. If there are no exceptions, the Details view for the employee is blank. From this view, you can:

- See the dates and exception details
- Access an employee’s hourly timecard view
Workforce Timekeeper

- Toggle to display or hide an employee’s schedule
- Resolve exceptions manually or by using one of the available action buttons

Accessed from Summary view, the Details view provides access to in and out punches, schedule data, and more details about exceptions. In this view, you can also resolve exceptions and enter comments.

**Visual Indicators in the Details View**

The Details view provides several visual indicators to help you quickly interpret the data on the screen.

<table>
<thead>
<tr>
<th>Exception Type</th>
<th>Details View Visual Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unexcused absence</td>
<td>Date displayed in red text</td>
</tr>
<tr>
<td>Excused absence</td>
<td>Date displays in blue text</td>
</tr>
<tr>
<td>Early in/out or late in/out</td>
<td>In or out time displayed in red text</td>
</tr>
<tr>
<td>Missed punch</td>
<td>In or out time cell filled with solid red</td>
</tr>
<tr>
<td>Reviewed exception</td>
<td>In or out time displayed in green</td>
</tr>
</tbody>
</table>
Resolving Exceptions in the Exceptions Widget

Action Buttons in the Exceptions Widget

Depending on the type of exception and its status, action buttons appear along the bottom of the page. Only the relevant actions are available. The following table lists and describes the action buttons you will see in the Exceptions widget.

<table>
<thead>
<tr>
<th>Action button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Save your changes to the database.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Cancels changes that you made prior to saving.</td>
</tr>
<tr>
<td>Justify</td>
<td>Allows you to review exceptions that were either justified by employees or that need to be justified by you. You can approve the employee change, approve application-delivered resolution, or justify the exception. Once justified, the exception color changes to green. Note: This is only applicable to certain organizations.</td>
</tr>
<tr>
<td>Mark as Reviewed</td>
<td>Indicates that you have reviewed the exception, and that no further action is required. The color of the exception changes to green and the Mark as Reviewed button changes to Unmark as Reviewed.</td>
</tr>
<tr>
<td>Change to Scheduled</td>
<td>Changes a missed in or out punch to the scheduled time. This feature only works for employees who have assigned schedules.</td>
</tr>
<tr>
<td>Comment</td>
<td>Adds a comment, and optionally a note, to an employee’s punch data.</td>
</tr>
<tr>
<td>Add Punch</td>
<td>Opens the Add Punch dialog box and inserts a punch time.</td>
</tr>
<tr>
<td>Remove</td>
<td>Removes punch data.</td>
</tr>
</tbody>
</table>

The following image highlights the action buttons within the Exceptions widget.

Tool Tip for Resolving Exceptions

The Details view of the Exceptions widget provides tips for resolving each particular exception type. If you hover the cursor over a time data exception, the application displays a recommendation.
Resolving Punch Issues

Using Change to Scheduled
To fix a missed punch exception, you can use the Change to Scheduled option. This button is available only with missed punch exceptions for employees who have schedules assigned to them.

If you know that the employee started work or left on time and simply forgot to punch, click the cell containing the missed punch to activate the Change to Scheduled button. The button is available only when the missing punch is either the first punch of the day or last punch of the day. For missing punches in the middle of the day, only the Add Punch option is available.

Resolving a Missed Punch with Change to Scheduled
1. Access the Time Exceptions widget.
2. From the Time Period drop-down list, select the applicable pay period.
3. Select the applicable group.
4. Select the applicable employee and then click View Details.
5. Click the cell with the missing punch and click Change to Scheduled.
6. Click Save.

Note
The Change to Scheduled button is only available when the missing punches are either the first or last punch of the shift. For missing punches in the middle of a shift, use the Add Punch option.

Using Add Punch
The Add Punch feature allows you to enter punch information in the time data using the Add Punch dialog box. In this dialog box, you can select the punch type and enter a punch time.

Adding a Punch in the Exceptions Widget
1. In the Details view in the Exceptions widget, click the cell containing the exception and then click Add Punch.
2. In the Add Punch dialog box, confirm the date. From the Insert drop-down list, select the applicable punch option.
3. Enter the appropriate punch time and click Add.
4. Click Save. Confirm that the exception no longer appears in the time detail view.

Note
You can also double-click a punch cell and enter a punch.

Unsaved Data Indicators
When you change any time or data information in the Exceptions widget, the Save and Cancel buttons turn orange, indicating that there is unsaved data.

- Click Save to write the edits to the database.
- Click Cancel to refresh the data, which reverts the data to its previous condition.

When you save or cancel, both indicator buttons become inactive.

Phantom data
Punches and pay code amounts that appear in purple text represent phantom data. Workforce Timekeeper automatically adds these entries to a timecard based on an employee’s schedule assignment.

Entering Comments
Comments are predefined, organization-specific descriptions that you attach to punches to provide additional information about that transaction.

Comments let you document specific details of worked and non-worked hours to help you with future analysis. If you have access, you can also add free-text notes to comments for clarification.
Adding a Comment
1. After making an edit within the Time Data Exceptions widget for an employee, access the details view.
2. Select the applicable punch.
3. Click Comment.
4. Select the applicable comment.
5. If applicable, click the + to add a clarifying note.
6. Click OK.
7. Click Save.
8. Validate that the comment is attached to the punch by hovering over the applicable punch.
9. To view any added notes, select the applicable punch and click Comment.
10. Scroll down and click the + next to the selected comment. The note text appears.
11. Click Cancel to exit the screen.

Marking an Exception as Reviewed
Even if alerts are not configured, managers can view summary and details of any employee time data exception by accessing the Exceptions widget. Managers can perform most of the key tasks they need to accomplish on their employees’ time data in the Exceptions widget, including marking and unmarking an exception as reviewed.

You would mark an exception as reviewed to indicate that you have seen it, and do not want to see it repeatedly in general queries and searches. Only punch exceptions can be marked as reviewed.

Note that after an exception is marked as reviewed, it disappears from the Summary view of the Exceptions widget.

Marking Exceptions as Reviewed
1. The Details view, select the cell containing the exception.
2. Click Mark as Reviewed.
   The exception turns from red to green.
Unmarking Exceptions as Reviewed
1. In the Details view, select the cell containing the exception.
2. Click Unmark as Reviewed.
   The exception turns from green to red.

3. Click Save.

Tip
Add a comment to a resolved exception if you want to note additional information about the resolved exception.
Use HyperFind functionality to search for resolved exceptions and general exceptions.

Removing a Punch
Many organizations discourage the modification of punches that originate from data collection sources, such as a Kronos 4500 device, because these punches reflect actual times an employee worked. However, there are exceptions to this rule. For example, an employee might punch twice when starting or ending a shift. If this occurs, you can delete the double punch.

Removing a Punch
1. Access the Time Data Exceptions widget and select the applicable pay period.
2. Select the applicable employee and click View Details.
3. Click the applicable punch and click Comment.
4. Select the comment that represents the reason for the punch removal.
5. Click OK.
6. Click Save.
7. Click the applicable punch cell again and then click Remove.
8. Click **Save**.

9. To verify that this issue was resolved, navigate back to the **Summary** view of the **Time Data Exceptions** widget.

10. With the applicable employee selected, access **GoTo > Audits**.

11. Verify that the deleted punch and comment attached to the deleted punch appear within the grid.

---

**Recommended Practice**

Before you remove a punch, attach and save a comment to it. You cannot add a comment to a punch after the punch is deleted. Adding a comment provides documentation about why you deleted the punch.
Reviewing Exceptions in Hourly

In Workforce Timekeeper, managers can access employee timecards in a central location, using the Manager Timecard widget. Managers can review and address exceptions in both hourly and project timecards from the widget.

Hourly Timecard View

The hourly timecard is another tool for managing employee time data for hourly employees, or employees who punch in and out to track worked time. Similar to the Details view of the exceptions widget, there are visual indicators that identify time data discrepancies. There is also a visual indicator for a comment that has been attached to a punch.

Exceptions can also be resolved in this tool, and comments can be added here as well.
Accessing Hourly Timecards

Workforce Central provides several methods for accessing hourly and project employee timecard data, including:

- Via the View Timecard link in the Exceptions widget Details view
- Using a Workforce Genie
- Using a GoTo Navigation link

Accessing Timecards via the View Timecard Link In the Exceptions Widget Details View

If an employee appears with an exception in the Exceptions widget Summary view, you can select the employee and click View Details.

<table>
<thead>
<tr>
<th>Name</th>
<th>Early In/Out</th>
<th>Late In/Out</th>
<th>Missed Punch</th>
<th>Unexcused Absence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams, Julie</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Agee, Raymond</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Baxton, Michael</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Baker, Ginger</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Billings, Thomas</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Boyd, Mary J</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brooks, Bob</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**View Details (1)**

Total: 0 0 0 0 4

From the Details view, you can click View Timecard to access the employee’s timecard.

The employee’s timecard appears. You can perform an action on the timecard, or close the timecards workspace to return to the Details view of the Exceptions widget.

Accessing Timecards via a Genie

You can access a timecard from a Genie by double-clicking the employee’s name.

Accessing Timecards via GoTo Navigation

Depending on how your navigator is configured, you may have a GoTo Control icon in the upper-right corner of some widgets.
GoTo navigation is configurable, so it is possible to configure this control to provide a link directly to an employee timecard.

To access the timecard, you select one or more employees, click the GoTo control, and select the Employee Timecard link.

Visual Indicators in Hourly and Project Timecards

The timecard views provide several visual indicators to help you quickly interpret the data on the screen.

<table>
<thead>
<tr>
<th>Exception Type</th>
<th>Hourly View Visual Indicator</th>
<th>Project View Visual Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unexcused Absence</td>
<td>Red icon with white line near top in Date cell</td>
<td>Same</td>
</tr>
<tr>
<td>Excused Absence</td>
<td>Blue icon with three white lines in date cell</td>
<td>Same</td>
</tr>
<tr>
<td>Early In/Out or Late In/Out</td>
<td>Red icon with white line near top in the impacted punch cell</td>
<td>NA</td>
</tr>
<tr>
<td>Missed punch</td>
<td>In or Out time cell filled with solid red</td>
<td>NA</td>
</tr>
<tr>
<td>Reviewed exception</td>
<td>Green icon with three white lines in the impacted punch cell</td>
<td>NA</td>
</tr>
</tbody>
</table>
When a comment is added in a timecard, a blue comment bubble appears to the right of the punch.

Tip
To learn more about visual indicators in the different time data views, review the following topics in Online Help:
- From Contents, access: Timekeeping > Timecard > Icons in the timecard and Colors in the timecard
- From Contents, access: Timekeeping > Exceptions widget
Analyzing and Resolving Exceptions in Hourly Timecards

The hourly timecard view allows you to perform additional tasks for hourly employees, beyond resolving time data exceptions. In this topic, we will review:

- Saving time data changes in the hourly timecard view
- Transferring employees

Saving Changes to Information in the Timecard View

Unsaved Data Indicators

Similar to the Exceptions widget, the hourly timecard view provides visual indicators to inform you when you have unsaved data. The Save icon turns orange when changes have been made to timecard information. If changes have been made that impact timecard totals, the Calculate Totals icon will also turn orange.

After you complete your edits, you must click Save to write those edits to the database. When you do, the visual indicators will disappear.

Saving Changes within a Timecard

1. Complete your edits within the timecard.
2. If you decide you no longer want the edits to be made, click Refresh. The data will return to the state before edits were made.
3. To save your edits, click Save.
4. If your data is not updated, click Refresh.

Refreshing Workforce Timekeeper Data

Clicking Refresh cancels unsaved edits and displays data as of the last save.

- To discard any changes, after clicking Refresh, click Yes.
- If you click Refresh, but want to save the changes, click No and save the data.
Calculating Totals Before Saving Changes

In some cases, you may want to calculate the totals that were impacted by your edits before saving the data. To do this, perform these steps.

1. Complete the edits within the timecard.
2. Click **Calculate Totals**.
3. If you decide you do not want to save the edits after review the impacts, click **Refresh**.
4. If you decide to move forward with the edits, click **Save** and, if necessary, click **Refresh**.
Transferring Employees

During the normal workday, all worked and non-worked hours are calculated using the employee’s default work rule and charged to the employee’s assigned labor account and job.

Employees are each assigned to a primary labor account, a default work rule, and possibly a primary job. Employees are not limited to working where they have been assigned.

Using the Transfer Field

Use the Transfer field in the timecard to transfer employee’s time to a new labor account, work rule, or job. Click Search to display the Select Transfer dialog box.

Transferring an Employee

1. Access a Genie and click Refresh.
2. Select an employee and access GoTo > Timecards.
3. Select a day you want to transfer hours to.
4. Click the Transfer cell in the row for the applicable date.
5. If the applicable job does not appear in the Transfer list, click Search.
6. In the Job Transfer tab of the Transfer dialog box, click + until you reach the applicable job.
7. Click Apply.
8. Click **Save**.

Use the Transfer field in the timecard to transfer employee’s time to a new labor account, work rule, or job. Click Search to display the Select Transfer dialog box.

**Note**

If employees regularly work in multiple location, they can be set up to automatically distribute their hours to multiple labor accounts, pay codes, and/or organizational jobs.

In addition to searching for transfers, a short list of transfers can be displayed. By default, the list displays a user’s most recent transfers, known as the Most Recent Used (MRU) list. However, some organizations can choose to limit the labor accounts and work rules that employees can transfer to. The MRU list can be replaced with an Easy Transfer list. To learn more about Easy Transfers, access content on KnowledgePass.
Reviewing Timecard Data
Accessing Employee Data Using Workforce Genies

Genies are highly customizable for users to ensure that they see only the data that is applicable to their business needs. Depending on your navigator configuration, you can select available Genies from either the Related Items pane or the Genies widget.

The Genies Widget

The Genies widget provides convenient access to Genies within your workspace. If configured, all of the widgets that you have access to can be found in the Genies widget.

Sorting, Grouping, and Refreshing Data in a Genie

You can access the most up to date data within a Genie by clicking the refresh icon. You can also manage the look of the Genie by using the sort and filtering features within the Genie.

Within Workforce Genies, you can sort columns of information by clicking the small arrow that appears when you hover over a column header to see your options for how to sort or group the data within the column.

Click **Refresh** to display the most current information.

Filtering within Genies

Use the filter function to narrow down the number of employees you are viewing within the Genie.

After clicking the Filter icon, filter fields appear at the top of any columns that can be filtered. As you type in any of these filter fields, only rows containing the characters you type will remain in the workspace.
**Workforce Timekeeper**

**Sharing Data in a Workforce Genie**

Workforce Genies display critical information in an easy-to-read format. You can print this information or export the data to other applications, such as Microsoft Excel, where you can reformat the data for your business needs.

**Note**

When the exported file is opened with a compatible application, each row appears on a separate line or row.

**Locating Employees Using the QuickFind Genie**

You can use the QuickFind Genie to search for a specific person or set of people. In QuickFind you can use the Name or ID field to change the list of employees that is displayed. You can also use the Time Period drop-down list to change the time frame of the records you want to view.

1. Navigate to the **QuickFind Genie**.
2. With the * in the Name or ID field, click the magnifying glass to display all employees that you have access to.
3. In the Name or ID field, enter the last name or first 3 letters or a last name with the * after your entry.
4. Click the magnifying glass or press Enter.
5. If applicable, from the Time Period drop-down list, select the applicable timeframe.
6. Click Filter.
7. In the filter field of the applicable column, enter a value to further narrow down your returned results.
8. Click within a column header to sort the column values in descending order.
9. Select the employee or employees from the list and perform the applicable action.
Using the Reconcile Timecard Genie to View Exceptions

The Reconcile Timecard Genie displays at-a-glance, summarized information about scheduled and worked time differences for employees.

- Black check marks represent unresolved exceptions
- After exceptions are marked as reviewed, they are removed from Reconcile timecard

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Unexcused Absence</th>
<th>Missed Punch</th>
<th>Early In</th>
<th>Late In</th>
<th>Early Out</th>
<th>Late Out</th>
<th>Overtime</th>
<th>Unaltered Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams, Julie</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aguirre, Raymo...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anderson, Jam...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Araki, Michael</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Babson, Mildred</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baker, Ginger</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Billings, Thomas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boyd, Mary J</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brooks, Bob</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carpenter, Jill</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clifford, Lisa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crowsoft, Mich...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

44
0
```

Finalizing Timecard Review Using the Pay Period Close Genie

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

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Employee Approval</th>
<th>Manager Approval</th>
<th>Approved Manager Names</th>
<th>Signed Off</th>
<th>Missed Punch</th>
<th>Unexcused Absence</th>
<th>Worked Hours</th>
<th>Leave Taken</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams, Julie</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aguirre, Raymo...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anderson, Jam...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>80:00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

© 2015, Kronos Incorporated or a related company. All rights reserved.
Running and Viewing Reports

Workforce Central reports provide you with access to information stored in the database. All reports that you can access appear in one or more report categories.

Running a Report

1. From the Related Items pane, click the Reports widget.
2. On the Select Reports tab, expand the All category and select the report you need to run.
3. Select your report criteria.
4. Click Run Report and then click Refresh Status.
5. When the status is Complete, click View Report. Note that the report opens in a separate window or tab, depending on your internet browser options.
6. Access the tab or window and review the report.
Finalizing Timecards
Approving Employee Timecards

You need to validate that all employee timecards are ready for payroll processing and that your employees have applied their approvals. After the timecards are validated, you can apply your approval and check the results. If the approval is successful, Payroll personnel can then start preparing time data for payroll processing.

Approval Effects on Editing Capabilities for Managers

After a manager applies an approval to a specified time period for an employee, the ability of the manager to perform further edits depends on his or her access rights.

Check with your Workforce Timekeeper Application Administrator to determine whether you can edit employee timecards that you or another manager has approved.

Visual Indicators of Timecard Approval Status

Workforce Timekeeper provides visual cues within employee timecards that represent approval statuses. The timecard is shaded various colors depending on where the timecard is within the approval process.

The following table identifies the various timecard shading colors and what they signify.

<table>
<thead>
<tr>
<th>Timecard color</th>
<th>Status of timecard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange</td>
<td>Timecard has been approved by the employee only</td>
</tr>
<tr>
<td>Yellow</td>
<td>Timecard has been approved by the manager only</td>
</tr>
<tr>
<td>Green</td>
<td>Timecard has been approved by both employee and manager</td>
</tr>
<tr>
<td>Grey</td>
<td>Timecard has been signed off by either the employee, manager, or both</td>
</tr>
</tbody>
</table>

Approving Employee Timecards Using the Approval Wizard

1. Access the **Timecard Approval** wizard.
2. Confirm or modify the values in the **Time Period** and **HyperFind** field. If you make any changes, click **Save**.
3. Click **Next**.
4. Review the **Exceptions** widget for any exceptions that have not been addressed. Correct the exceptions as necessary. Click **Next**.
5. Select one or more employees whose timecards you want to approve. Hint: If you are not viewing the applicable Genie, select the applicable Genie from the drop-down list.
6. Select **Approval > Approve Timecard**.
7. Click **Yes** on the pop-up message. Then click **Next**.

8. Review the results of your time approvals. To start a new timecard approval, click **Clear**.

9. Click **OK** on the pop-up message.

---

**Removing your Approval**

After you apply an approval to one or more employee timecards, those employees can no longer edit their timecards for that time period. However, there might be circumstances when an employee needs to make further edits to a timecard after a manager has applied an approval.

Removing your approval from a timecard allows other managers—and possibly the employee—to edit time data for the dates from which you removed your approval.

If your organization chooses to implement this feature, you will be able to remove and re-apply approval as needed.
Using the Workforce Timekeeper Interface
Basic Navigation

Searching for Employees Using the QuickFind Genie

The QuickFind Genie is a convenient tool you can use to search for a person or a set of people in the application.

You can use the following methods to search for employees:

- Search by employee’s last name
- Search by name or ID
- Search by partial name or ID

You can also change the list of people that appear by selecting a different period from the Time period drop-down list.

**Searching by Employee’s Last Name**

1. In the Name or ID field, enter the employee’s last name and click Find.
   - For example, enter Babson and click Find.
   - QuickFind returns the list of all employees whose names begin with the letters Babson.

**Searching by Name or ID**

1. In the Name or ID field, enter the employee’s ID number and click Find.
   - For example, enter 601 and click Find.
   - QuickFind returns the person with ID 601.

**Searching by Partial Name**

If the employee you are looking for has a long name, or if you are unsure how to spell it, you can use the asterisk (*) wild card character, which allows you to search using just the first letter or first few letters of the employee’s name.

1. In the Name or ID field, enter the first few letters of the employee’s name, followed by an asterisk (*), and click Find.
   - For example, type ca* and click Find.
   - QuickFind returns the list of all employees whose names begin with Ca.
   - Note that you can use the wild card character in the middle of a name. For example, if you don’t know whether an employee’s name is MacDonald or McDonald, you can enter M*Donald, and QuickFind will return all employees whose names begin with M and end with Donald.
Searching by partial number or ID

You can also search by partial ID by entering the first number or first few numbers, followed by the * character in the Name or ID field. QuickFind returns all employees whose IDs begin with those numbers.
Monitoring Timecards to Facilitate Payroll Processing
Resolving Exceptions in the Exceptions Widget

Justifying an Employee’s Missing Time

Missing time is any instance of time that employees have missed when they were scheduled to work. In Europe, many organizations need to ensure that employees are working a target number of hours per day, week, month, or year. To help European organizations comply with labor laws that govern target hours, missing time exceptions can be automatically resolved with paid or unpaid duration pay codes.

To understand how this process works, imagine that your organization auto-resolves missing time exceptions. Your employee left work two hours early last Tuesday. Here are the steps that must be followed by both you and your employee to accurately account for missed time.

Justifying Missed Time

1. The employee reviews the timecard. In the timecard, the employee must justify any exception that has a Missing Time pay code. The employee selects the Out punch, selects Punch > Justify Exception. The employee selects a justification from the list and submits the timecard for manager approval.

2. As the manager, when you review the Summary page in the Exceptions widget, this employee appears with an Early Out Missing Time exception.

3. You can review the employee’s reason for the missing time, and either confirm the justification, change to another justification, or use a combination of justifications.

4. You then mark the exception as reviewed and approve the time data.
Canceling a Meal Deduction

An automatic meal or break deduction is a length of time defined in an employee’s work rule that is automatically deducted from shift hours when that employee works a specific length of time.

If, for any reason, the automatic deduction needs to be canceled, you can perform the task by editing the punch data.

This task is performed in the Edit Punch dialog box, which is accessible from the employee’s timecard. You select the applicable type of deduction from the Cancel deduction drop-down list.

Example: An employee is scheduled to work from 8 A.M. to 5 P.M. with a lunch break from 12 P.M. to 1 P.M. The hour is automatically deducted from the employee’s shift total; 8 hours instead of 9 hours. If the automatic deduction needs to be canceled, you can perform that task by editing the punch data.

Paying an Employee for Working through a Meal

1. Access Reconcile Timecard.
2. Using the Context Selector, select the applicable time period and group of employees.
3. Access an employee’s timecard.
4. Right-click the applicable punch and click Edit.
5. From the Cancel Deduction drop-down list, select the applicable meal deduction.
6. Click OK.
7. Click Save.

Recommended Practice

Add a comment to the edited punch to document the reason for the edit.
Finalizing Timecards
Signing Off Employee Timecards (Managers Only)

Every week, after approving your employees' timecards, you need to sign off the timecards so they can go through your payroll procedure. To facilitate this task, you can use the Timecard Sign Off wizard.

Signing Off on Employee Timecards
1. From the Related Items pane, access the Timecard Sign Off wizard.
2. Confirm or modify the values in the Time Period and HyperFind fields.
   Note: If you change the values in the Time Period or HyperFind fields, click Submit to apply these settings for the rest of the pages in the wizard.

3. Click Next.
4. In your Kronos inbox, click on each missed punch message. Approve or reject the employee’s submitted edits regarding missed punches.
   If you approve and submit, the edited missed punch will now appear on the employee’s timecard, and the employee will receive an email notification. You will not be able to sign off a timecard at the end of the pay period without all missed punches being taken care of beforehand (either manually, or through employee submission and approval).
5. Click Next.
6. Select one or more employees whose timecards you want to sign off.
7. Select Approvals > Sign Off.

8. Click Yes.
9. Click Next.
10. On this page, review the status of your timecard signoffs. If there are any failures, click Details to view additional details.
11. Click Clear.
12. Click OK.