Supervisor and Time Approver Guide to Kronos Time and Attendance

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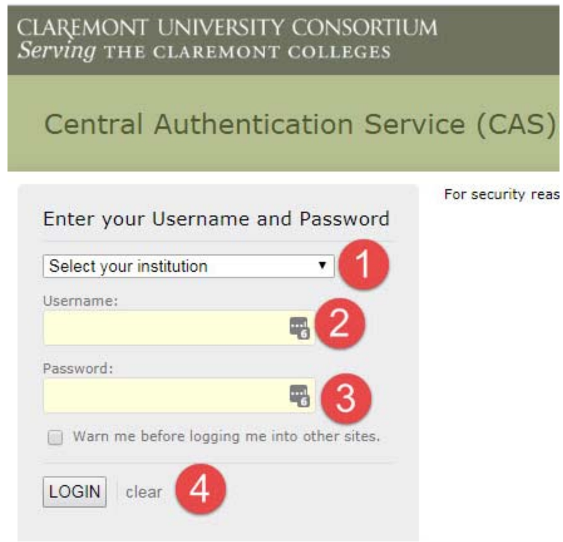
Logging In and Signing Out

You will need your HMC credentials to login to Kronos. If you need assistance with resetting your HMC credentials please contact the CIS Help Desk at extension 77777.

Logging in

1. Login to Kronos at https://timekeeping.claremont.edu
2. In the **User Name** field, enter your HMC user name.
3. In the **Password** field, enter your password.
4. Click Login or press the **Enter** key on the keyboard.



Signing out

1. Click **Sign Out**. You are brought to the Workforce Central log on page.

> Note
> 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.

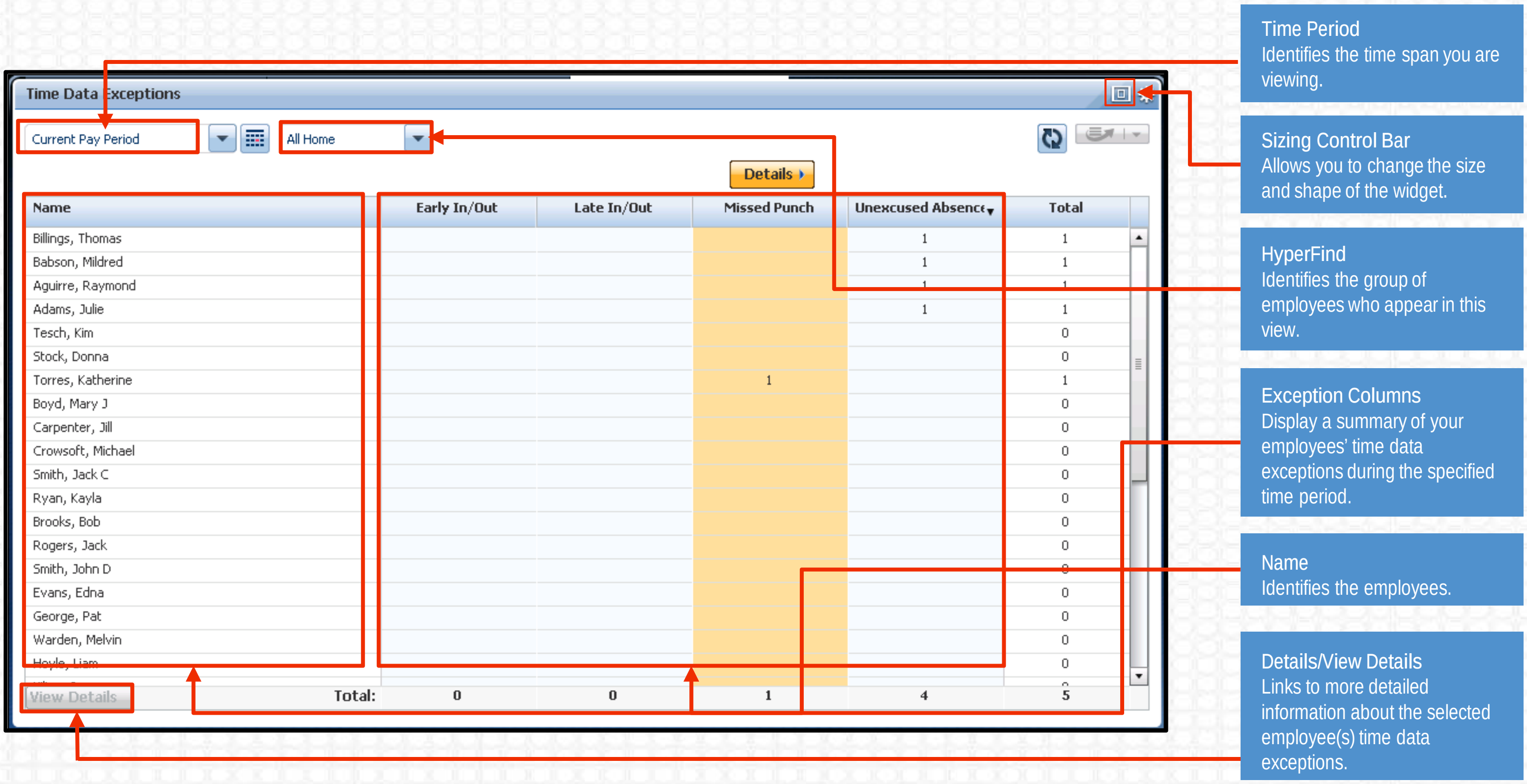
Workforce Timekeeper is an automated timekeeping application that helps you better manage employee time data so that it can be approved and processed in your organization's payroll application. It provides several tools that assist you in performing the following key tasks:

- Edit employee start and stop times, as needed
- Check for missed punches and exceptions
- Enter non-worked time for employees who are unable to enter the time for themselves
- Make schedule changes
- Transfer employees

Displaying Time Data Views: Exceptions Summary and Exceptions Detail

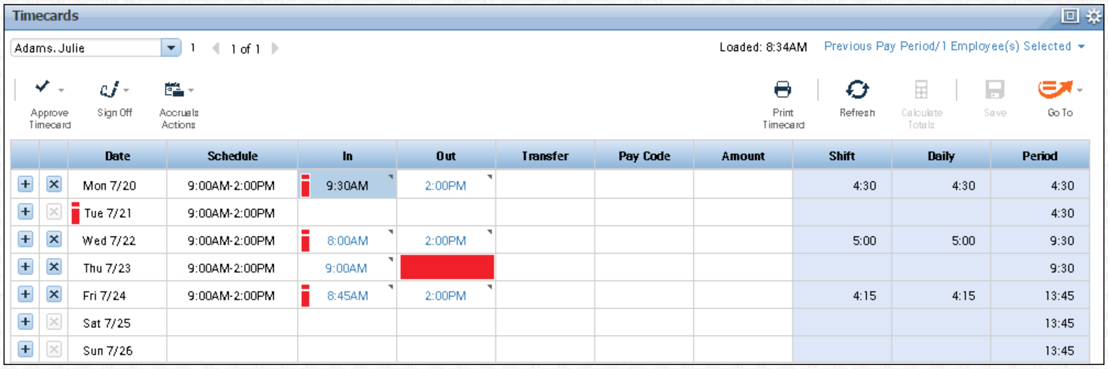
Exceptions Widget – Summary view

This view provides an at-a-glance view of timecard exceptions for employees with hourly timecards. Exceptions appear by employee and by exception type. You can access this view by opening the Exceptions widget directly, or from the Details view using the Summary left-facing arrow. When an employee record is selected, you are brought to the Details view.



Exceptions Widget – Details view

This view is populated only when an employee has an exception. From this view, you can see the dates and exception details, and resolve exceptions using one of the available action buttons. You can also access an employee's timecard view to see information about the employee's worked time and schedule. Hover over the red icon to view more information on the exception type.

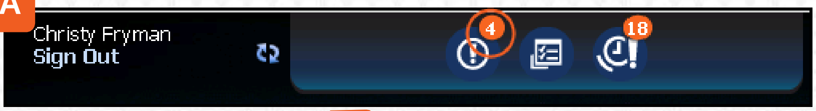


Reviewing the Exceptions alert

Your navigator is configured to receive alerts, and if any employees trigger a time data exception (such as a missed punch), the Alert icon in your navigator will display a number corresponding to the number of employees with exceptions in the top-right corner of the icon. (See graphic A.)

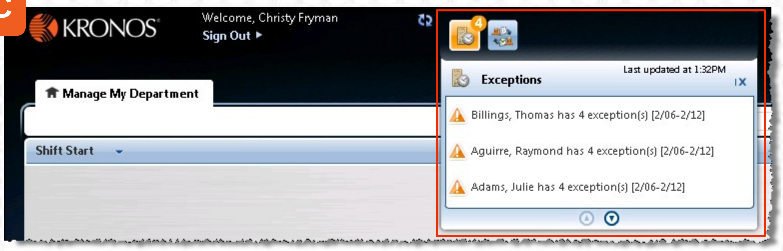
Hover over the alert to see a pop-up (graphic B). Click the Alert icon to display a list of your employees' time data exceptions (graphic C). Click View All to see more details in the Alerts and Notifications widget (graphics C and D). At any time, when you click an employee's name, you are brought directly to the Details view of the Exceptions widget for the selected employee.

A

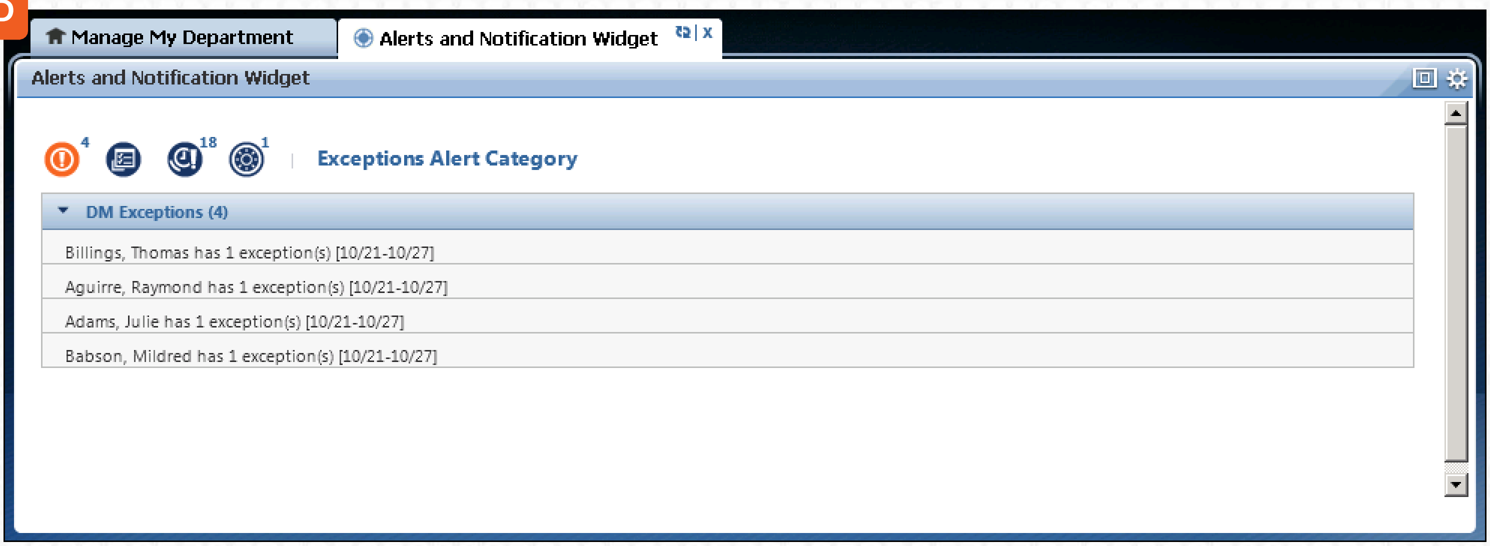


B

C



D



Editing a Punch

1. In the Details view, click the **In** or **Out** cell.
2. Enter the new time; for example, 3:30P. Then click **Save**.

Acceptable Punch Formats

- Enter time in either 12-hour or 24-hour format (1:00P or 13:00).
- Leading and trailing zeros are optional (0700 and 7 will be converted to 7:00AM).
- Colons are optional (730 will be converted to 7:30AM).
- AM is assumed for all entries except for 12:00 to 12:59, when PM is assumed.

Acceptable Amount Formats

- Leading zeros are optional (07 will be converted to 7:00).
- Trailing zeros should not be used (0700 will be converted to 700 hours).
- Decimal entries are supported (7.5 will be converted to 7:30).
- A colon or decimal is required when entering minutes (for 7-1/2 hours, enter either 7.5 or 7:30).

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Adding a Punch

1. In the **Hours Summary** Genie, highlight the employee(s) name.
2. Select **Timekeeping** and **Add Punch**.
3. Select date, enter time and click **Apply**.

(You can also add a punch from the employee timecard.)

Removing a Punch

1. If an In or Out punch was entered accidentally, open the timecard and click the cell and delete the text using the delete button on your keyboard.
2. Click **Save**.

Adding Comments to an Exception

1. In the timecard, **select the punch or pay code amount** to which you want to add a comment.
2. Right-click punch, select **Comments** and then select one or more comments from the comment list or select
3. Other-please explain to enter a free-text comment.
4. Click **OK** and then click **Save**.

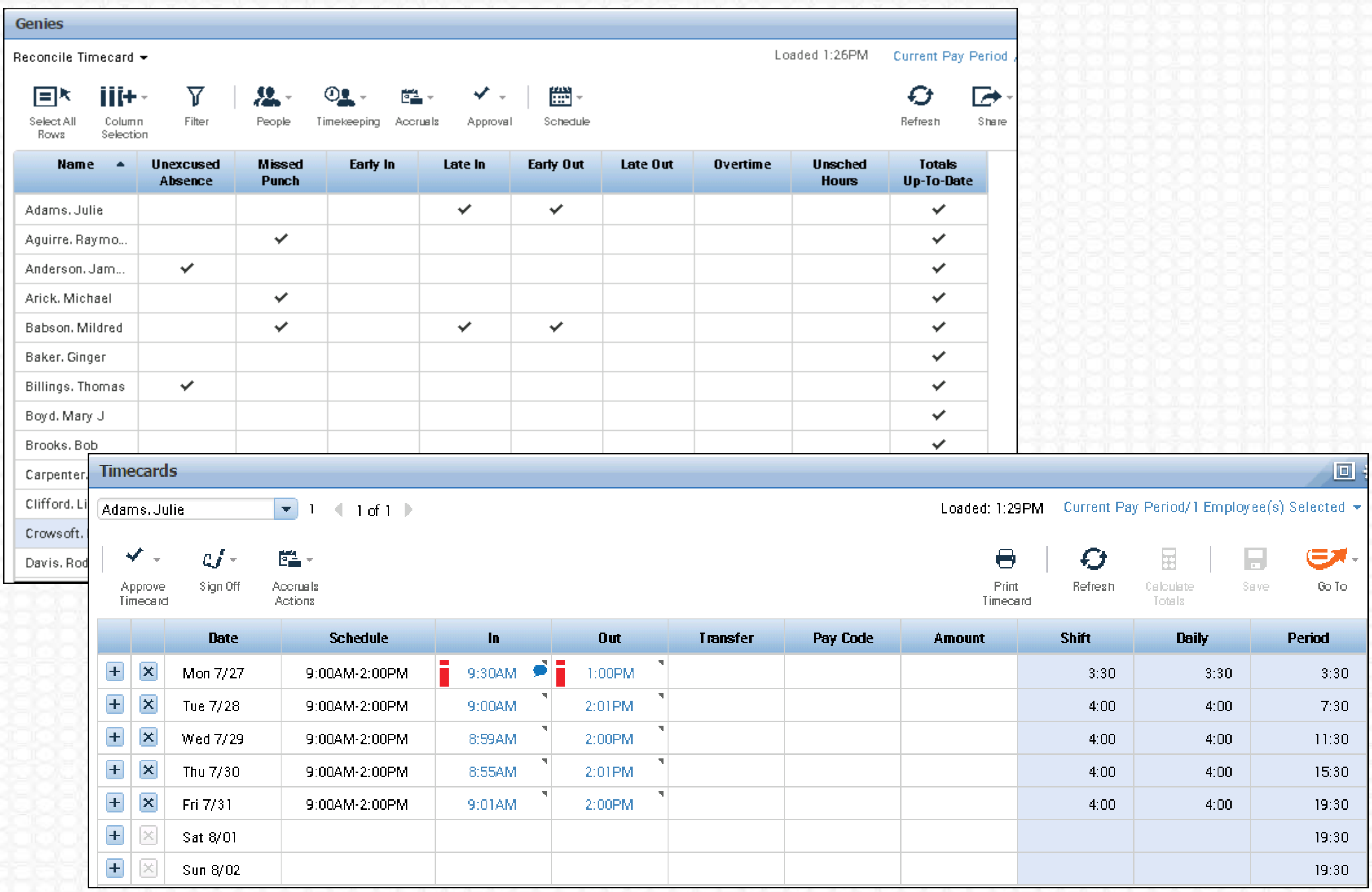
Best Practices

- If a comment is attached to an exception, a balloon icon appears to the right of the punch. Hover your cursor over the balloon to read the comment.
- To remove a comment, select the punch with a comment, click **Comment**, clear the check box for the comment, and then click **OK**.

Accessing Employee Timecard Data via Workforce Genies

From a Genie, such as the **Hours Summary** Genie, select an employee. Then use the orange **GoTo** Control function to access the Employee Timecard. You can also double-click on the employee name from your workspace to open their timecard.

All of the tasks that can be performed in the Details view of the Exceptions widget can also be performed in the Timecard view. However, more tasks can be performed in the Timecard view.



Common Tasks for Supervisors & Time Approvers

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Adding Non-Worked Time (Vacation, Sick, Personal)

1. In the employee timecard, double-click the **Pay Code** cell for the date you want to add non-worked time.
2. Select the applicable pay code from the list and press **Tab**.
3. In the **Amount** cell, either select an amount or enter an hours amount using one of the acceptable formats.

Best Practices

- You cannot add a pay code edit to a row that contains punches. If you want to add non-worked time to a day that has punches, click the plus sign associated with the day to add a new row.
- If needed, add a comment to the pay code to provide further details of the transaction.

Labor Level / Job Transfer on Employee Timecard

1. Access the employee timecard.
2. Enter the in-punch for the transfer.
3. Click the **Transfer** cell for the applicable shift. Either select an entry from the list or click **Search** to choose the new job by position title.
4. Enter the out-punch in the corresponding **Out** cell.

Best Practices

- When transferring hours to an employee's primary job or labor account after he or she has worked in a different job or labor account, be sure to enter the employee's primary job or labor account in the second Transfer cell.
- To transfer hours to a different job or task when two or more consecutive transfers appear for the same day, click the plus sign to create a new row in the timecard for each additional transfer.

Marking an Exception as Reviewed

1. In the employee's timecard, click the punch with an exception.
2. Click **Mark as Reviewed**.
3. Click Save.

Best Practices

- Exceptions occur when employee's do not work their scheduled hours. Kronos allows you to mark these exceptions as reviewed for future reference or if other managers assist in the timecard approval process. This only applies if your employees are using schedules.

Group Edits

1. From a Genie, select the employee group(s) and correct time period.
2. Select Timekeeping in the header and then select an **action** from the list like **Add Punch** or **Add Pay Code**
3. Complete the information in the dialog box and click Apply.
4. Access **Group Edit Results** widget to verify the **Status** and **Results** columns.

Best Practices

- Use either a Workforce Genie or a HyperFind query to select a specific set of employees.
- Use a group edit whenever you want to apply the same change to a number of employees. Group edits run as a background process, so you can perform additional edits in Workforce Timekeeper while the group edit is processing.

Generating Reports

1. Reports are visible as a widget that appears in the Related Items pane. Select the **Reports** widget.
2. Expand one of the categories and select a **specific report**.
3. From the **People** list, select a **HyperFind** option.
4. From the **Time Period** list, select a time span.
5. Click **Run Report**.
6. Click **Refresh Status** once.
7. When **Complete** appears in the Status column, click **View Report**.

Best Practices

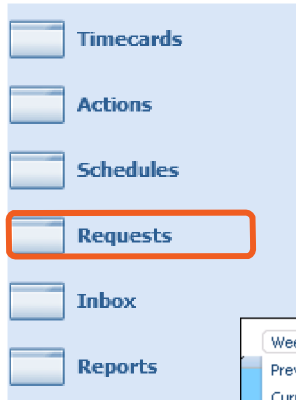
- To generate a report for one or more employees, select those employees using a Workforce Genie, and then select **GoTo > Reports**. Continue with step 2.
- To ensure that the report matches your needs, click the report name once and review its description in the workspace.
- While viewing a report, you can use the **Search** feature in Adobe Acrobat to locate specific information within a report.
- To send a report via e-mail, open the Share pane, and then select **Attach to Email**. By default, all standard reports use the Adobe Acrobat Document (.pdf) format.
- To print a report, use the **Print** option on the menu to send a report to a local or network printer.

Approving Time-Off Requests

After reviewing an employee's time-off request and gathering the data to support the request, you can approve the request from w ithin Workforce Timekeeper. You can approve the request as is, or edit the request to suit your staffing requirements. After approving the request, the application updates the employee's schedule and timecard to reflect the request details.

Approving a Time-Off Request

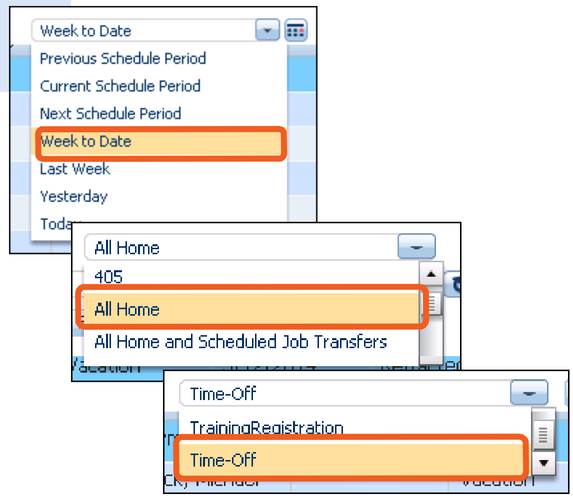
After an employee submits a time-off request, you will receive a notification regarding the request. You can review and act on the request from within the Requests widget.



1 Login to Kronos at https://timekeeping.claremont.edu

2 Log on to the application with your credentials.

3 If not already open in the main workspace, navigate to the **Related Items** pane and select **Requests**.



4 Enter or select the applicable time-frame for which you want to view requests.

5 Select the applicable group of employees for whom you want to review requests.

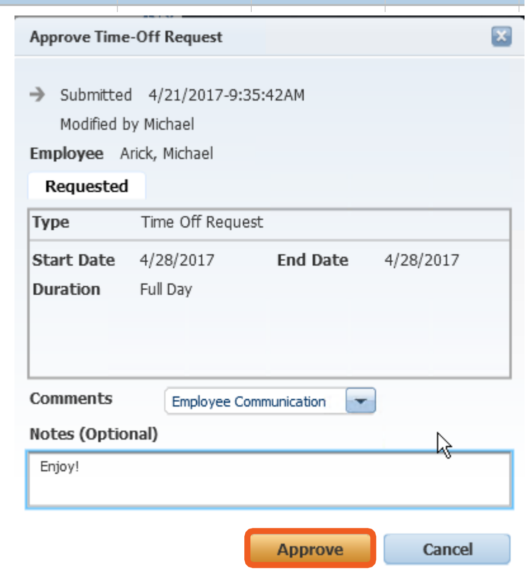
6 Select the applicable request type and status for which you want to view requests.

7 Highlight the applicable employee's name within the grid.

8 Click **Approve**.

9 Review the details within the **Approve Time-Off Request** window. If applicable, select the comments type from the **Comments** drop-down list and enter any associated comments within the **Notes** field.

Note
If you select the same comment type that is associated w ith the request type, the note that you enter w ill be visible to the employee. How ever, if you select another comment type, then the note w ill be visible only to other manager level users w ithin the approval chain (if applicable).

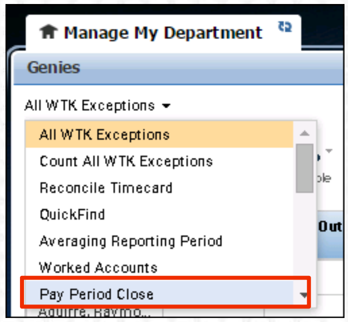


10 Click **Approve**.

- The status of the request within the grid will automatically be updated to **Approved.**
- The employee's schedule will be updated to reflect the approved time-off request.

Pay Period Close Tasks for Supervisors and Time Approvers

Viewing Genies to Close the Pay Period



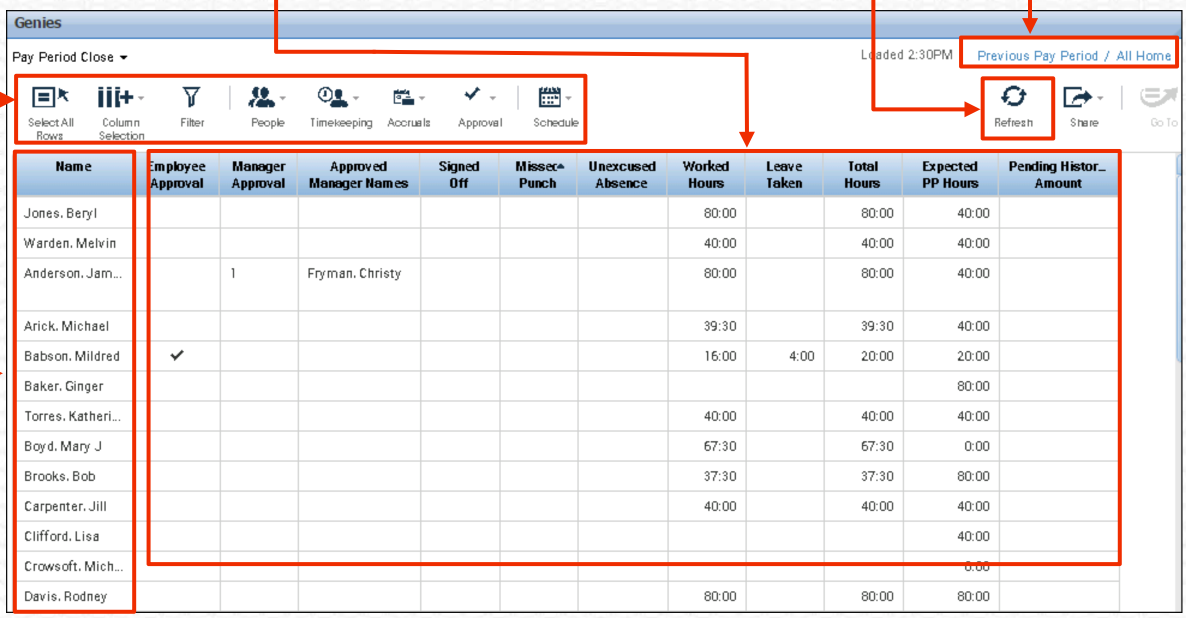
Columns
Displays information relevant to the end-of-payroll cycle.

Refresh
Displays the most current information from the Workforce Timekeeper database.

Show/Time Period
Identifies the employees who appear on the page and the time span you are viewing

Action menu
Displays actions and categories for performing tasks within Workforce Timekeeper.

Name
Identifies the employees.



Name	Employee Approval	Manager Approval	Approved Manager Names	Signed Off	Missed Punch	Unexcused Absence	Worked Hours	Leave Taken	Total Hours	Expected PP Hours	Pending Histor_ Amount
Jones, Beryl							80:00		80:00	40:00	
Warden, Melvin							40:00		40:00	40:00	
Anderson, Jam...		1	Fryman, Christy				80:00		80:00	40:00	
Arick, Michael							39:30		39:30	40:00	
Babson, Mildred	✓						16:00	4:00	20:00	20:00	
Baker, Ginger										80:00	
Torres, Katheri...							40:00		40:00	40:00	
Boyd, Mary J							67:30		67:30	0:00	
Brooks, Bob							37:30		37:30	80:00	
Carpenter, Jill							40:00		40:00	40:00	
Clifford, Lisa										40:00	
Crowsoft, Mich...										0:00	
Davis, Rodney							80:00		80:00	80:00	

Note: Depending on how Workforce Timekeeper is configured for you, you may have access to only some of the features mentioned here.

Reviewing Employees' Time

1. In the **Pay Period Close** Genie, review the data in the columns. You can double-click each header to sort.
2. To view more details about an employee's time, double-click the **employee's name** to display his/her timecard.
3. Always use the **Hours Summary** Genie to sort by number of hours worked, overtime, meal penalties and other values.

Best Practices

- Review the Worked Hours column to quickly identify discrepancies in employee's total worked hours.
- Address missed punch issues to ensure that your payroll data is as accurate as possible.

Approving Timecards

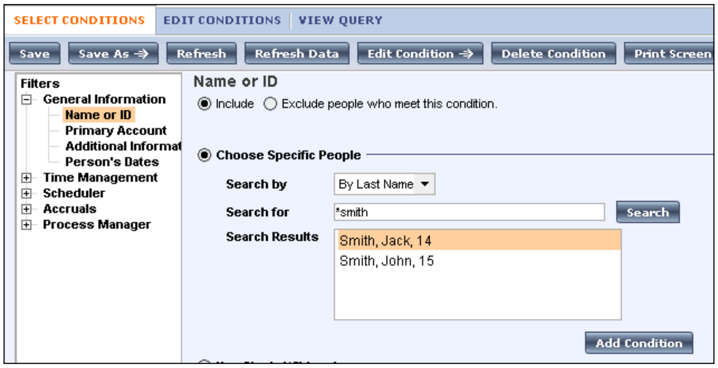
1. In the **Pay Period Close** Genie, select **the employee group(s) and ensure you are viewing the correct time period**.
2. Either **Select All Rows** or select the **individual employees** you want to approve.
3. Select **Approval > Approve Timecard**. Click **Yes**.
4. View **Group Edit Results**.

Best Practices

- Review the **Pay Period Close** Genie to ensure all employees have approved their timecard. (This does not apply to time clock users.)
- If you do not want your employees to perform additional edits for a specific timeframe, apply your approval for that timeframe.
- To perform additional edits to a timecard you have approved, select **Approval > Remove Timecard Approval**.

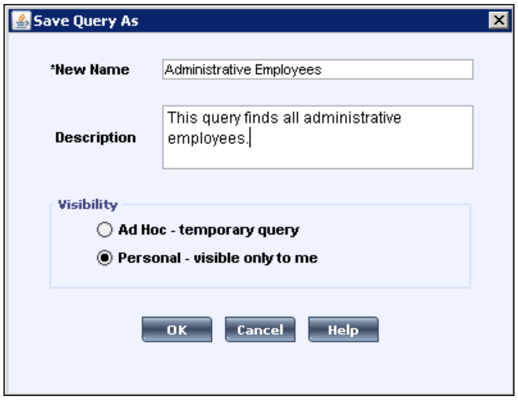
Creating a HyperFind Query to View Selected Employees

1. From any genie, such as **Hours Summary**, select **All Home and Transferred In** and then click **Edit**.
2. Select the filter category **Name or ID**.



3. In the **Search by** field, select an option if necessary .
4. In the **Search for** field, enter part of a name or ID.
5. Click **Search**.
6. Select an employee from the list.
7. Click **Add Condition**.
8. Repeat steps 3-7 to add additional employees.

9. Click **Save As**.



10. Select **Personal – visible only to me**.
11. In the **New Name** field, enter a name.
12. (Optional) In the **Description** field, enter a description.
13. Click **OK**.

Note:
- You can add additional filters by clicking on the filter category and adding one or more conditions.
- Most filters have the option to **Include** or **Exclude** a condition.
- Conditions selected on the same filter category are joined by “or.” Conditions selected on different filter categories are joined by “and.”

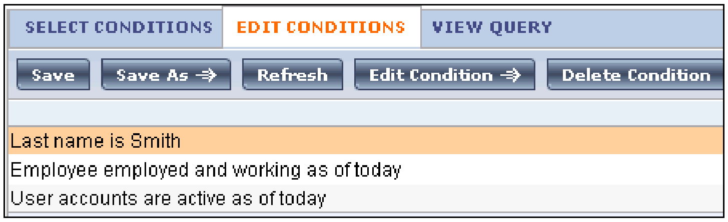
Testing a HyperFind Query

1. Click **Test**.
2. Review the list of names that appear.

Note: If the hour glass icon is visible, then the query is still running. If no people appear and the hour glass icon is gone, then the query did not return any employees.

Editing a HyperFind Query

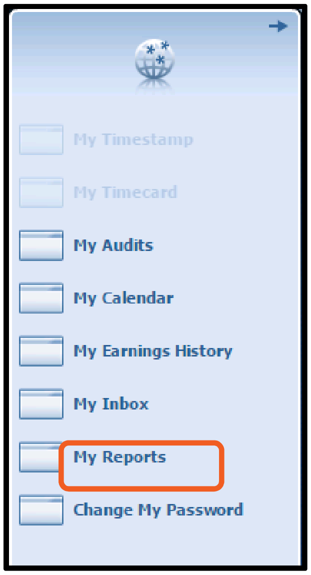
1. From any genie, such as **Hours Summary**, select a HyperFind Query and then click **Edit**.
2. Click **Edit Condition**.
3. Select a condition and click **Edit Condition**.
4. Complete the edit condition dialogue box.
5. Click **Update**.
6. Repeat steps 3-4 to edit additional conditions.
7. To delete a condition, select a condition and then click **Delete Condition**.
8. Click **Save**.
9. Click **Test**.



Running Reports

In Workforce Central Navigator Framework, you will have access to the My Reports widget. This widget contains three reports that help you to track your accrual balances and schedule, and provides details regarding the time that you worked. Keep in mind that while these three reports are available, you may not have access to them all. Access is determined by your organization.

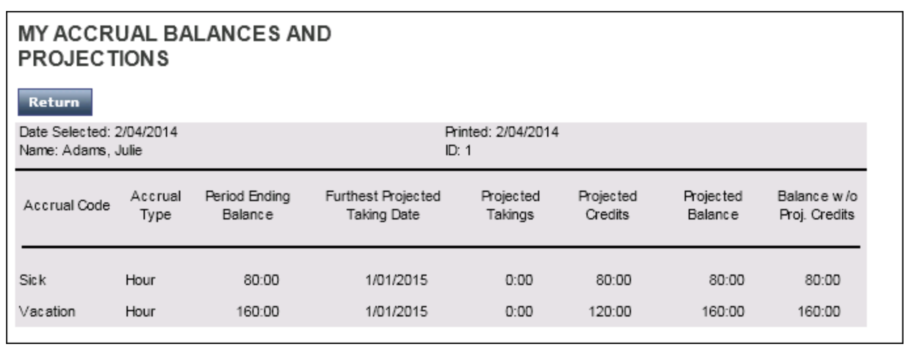
Accessing My Reports



Running the My Accrual Balances and Projections report

The My Accrual Balances and Projections report provides you with a summary of available leave time and projected future balances.

1. Access the **My Reports** widget.
2. From **Available Reports**, select **My Accrual Balances and Projections**.
3. If not running the report using today's date, from the **Time Period** drop-down list, select the **Specific Date** for which you want to run the report.
4. In the **Date** field, enter or select the applicable date.
5. Click the **View Report** button.
6. To print the report, click the print icon within your browser.



MY ACCRUAL BALANCES AND PROJECTIONS

Return

Date Selected: 2/04/2014 Printed: 2/04/2014
Name: Adams, Julie ID: 1

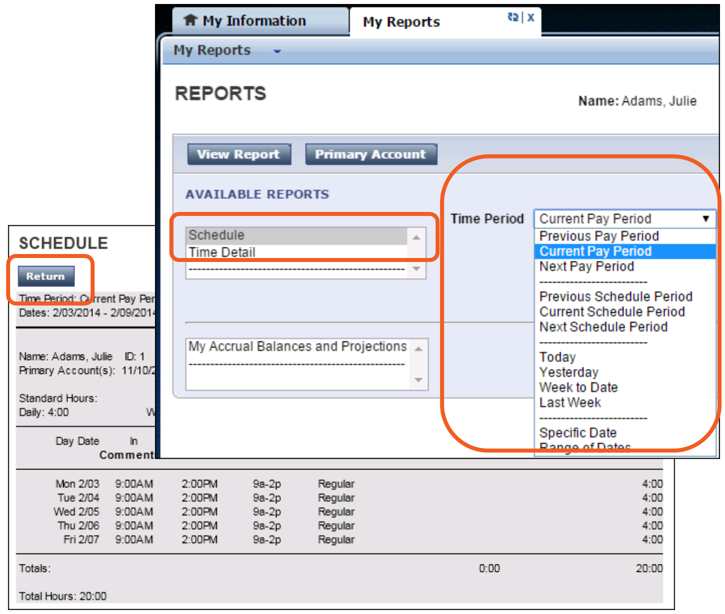
Accrual Code	Accrual Type	Period Ending Balance	Furthest Projected Taking Date	Projected Takings	Projected Credits	Projected Balance	Balance w/o Proj. Credits
Sick	Hour	80:00	1/01/2015	0:00	80:00	80:00	80:00
Vacation	Hour	160:00	1/01/2015	0:00	120:00	160:00	160:00

Column Name	Description
Period Ending Balance	Displays the number of hours or days you will have accrued as of the date of the report.
Furthest Projected Taking Date	Displays either the date you selected or the furthest date in the future for which your accruals have been projected, whichever is later.
Projected Takings	Displays how much leave time you will have used between the date you selected for the report and the furthest projected takings date.
Projected Credits	Displays leave time that is expected to be credited to you during that interval.
Projected Balance	Displays the balance for the furthest projected taking date after considering all projected takings and credits.
Balance w/o Proj. Credits	Displays the balance you would have as of the furthest projected taking date without considering any projected credits.

Running the Schedule report

The Schedule report provides details regarding dates and times you are expected to work as well as scheduled account transfers and vacation times.

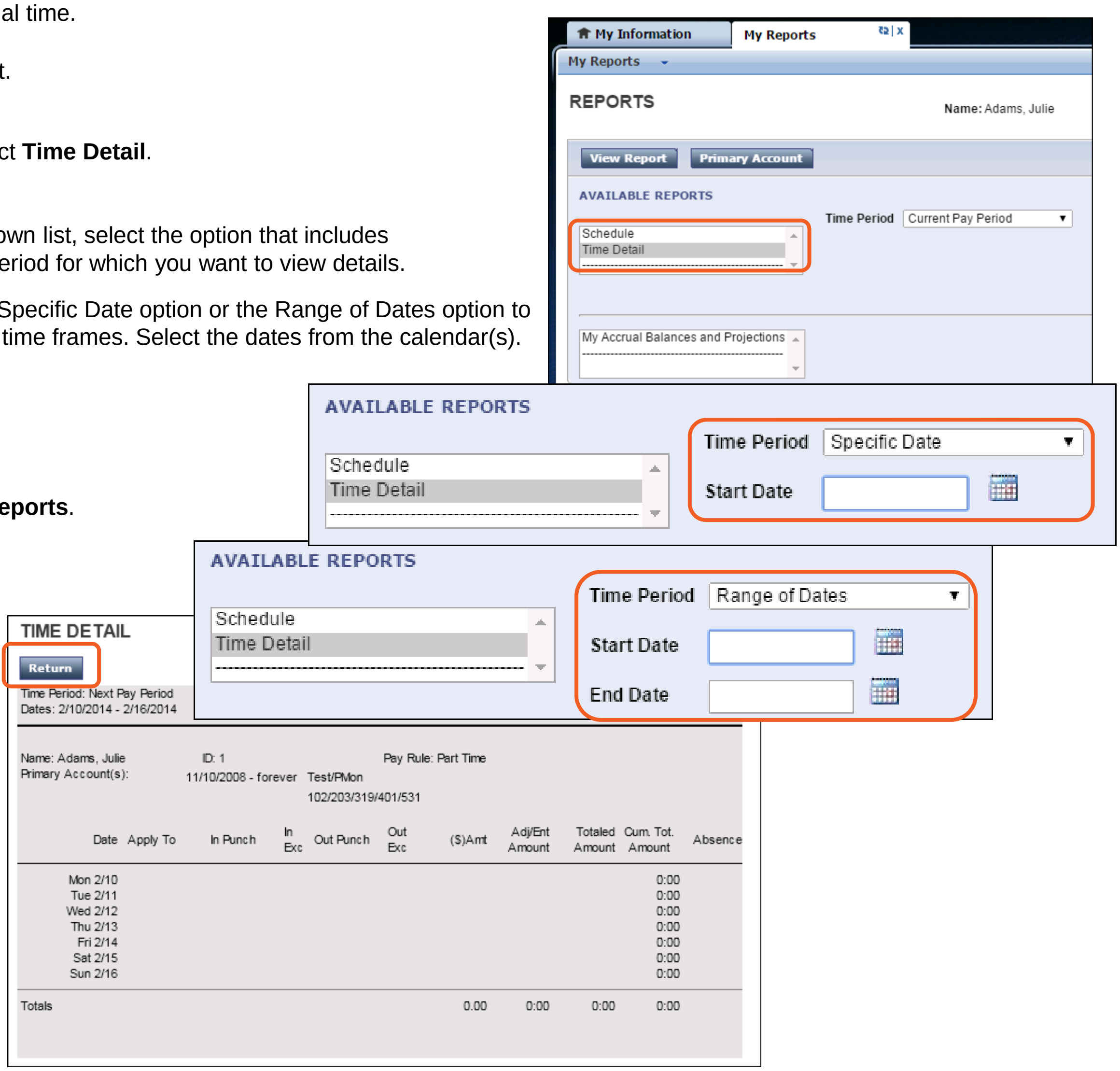
1. Access the **My Reports** widget.
2. From **Available Reports**, select **Schedule**.
3. From the **Time Period** drop-down list, select the option that includes the start and end date of the period for which you want to view details.
4. Click the **View Report** button.
5. Click **Return** to return to **My Reports**.



Running the Time Detail report

The Time Detail report provides details regarding the time you worked, the account you worked under, and any pay code edits that were made, for example, sick or personal time.

1. Access the **My Reports** widget.
2. From **Available Reports**, select **Time Detail**.
3. From the **Time Period** drop-down list, select the option that includes the start and end date of the period for which you want to view details.
   - Optionally, select the Specific Date option or the Range of Dates option to request more specific time frames. Select the dates from the calendar(s).
4. Click **View Report**.
5. Click **Return** to return to **My Reports**.



Manager Delegation

The Manager Delegation feature lets you temporarily delegate your manager authority for performing your timekeeping and/or scheduling tasks to other supervisors. The other supervisors can then perform your tasks using their HMC credentials. This feature helps to keep business processes moving, even when you are not there. You can cancel delegation requests at any time.

Delegating Scheduler and Timekeeper Tasks to another Manager

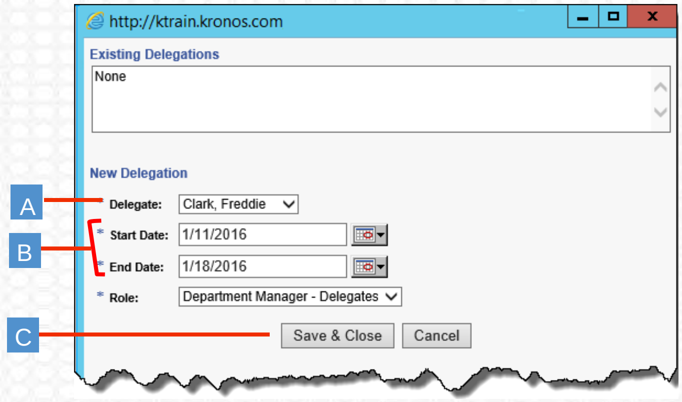
You initiate a delegation request by navigating to the **Actions** widget and selecting the **Mgr_Delegation** link to open the delegation request form.

A Select the designee from the list of eligible managers on the **Delegate** drop-down list.

B Enter the **Start Date** and **End Dates** for the delegation time period.

C Click the **Save & Close** button.

The delegation is not active until the designee accepts the designation request. The application uses the internal messaging system to automatically place a message and accompanying task in the potential designee's Inbox. It is also possible to activate an alert on the potential designee's Kronos screens.

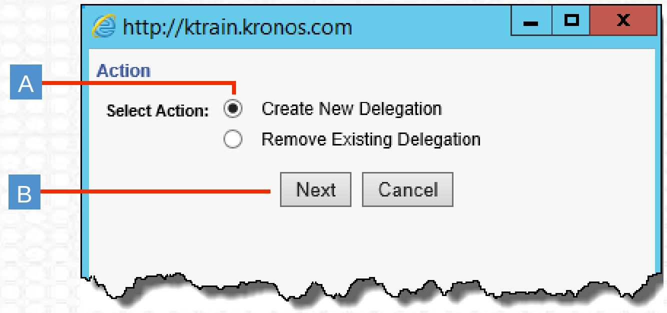


Adding Additional Delegations

You can initiate additional delegations for other designees and/or time periods. If there is an existing delegation when you click the **Mgr_Delegation** link on the **Actions** widget, an initial screen will offer you the option to create a new delegation or to remove an existing delegation.

A Enable the **Create New Delegation** radio button.

B Click **Next** to proceed to the delegation request form. Continue as described in the previous section.



Canceling a Delegation Request

A delegation automatically expires on the End Date submitted on the request form. However, you can cancel an active delegation request early by following the steps below.

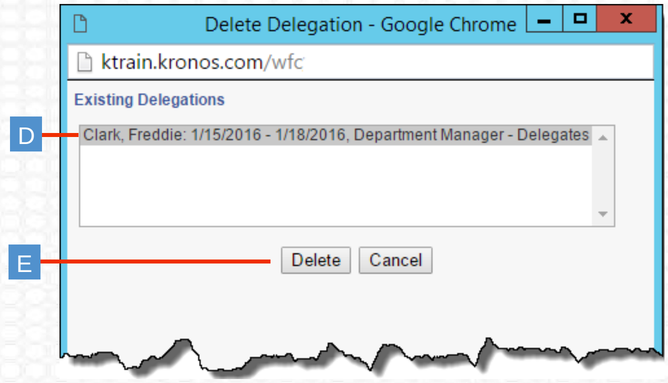
A Navigate to the **Actions** widget and select the **Mgr_Delegation** link.

B A screen will offer you the option to create a new delegation or to remove an existing delegation. Enable the **Remove Existing Delegation** option.

C Click the **Next** button.

D On the **Delete Delegation** screen, select the delegation you wish to remove.

E Click the **Delete** button.



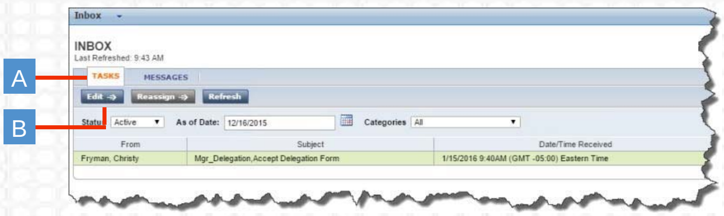
Accepting / Declining a Delegation Request

A designee must accept a delegation request before it becomes active. Organizations can elect to send notifications to potential designees via two methods:

- **Internal messaging (Inbox)**
- **Alerts**

Both methods will lead the potential designees to the screen that allows them to accept or decline a request.

Inbox Notifications



A Navigate to the **Tasks** tab of the **Inbox** to see the request.

B Select the request and click the **Edit** button to open the **Accept Delegation** screen.

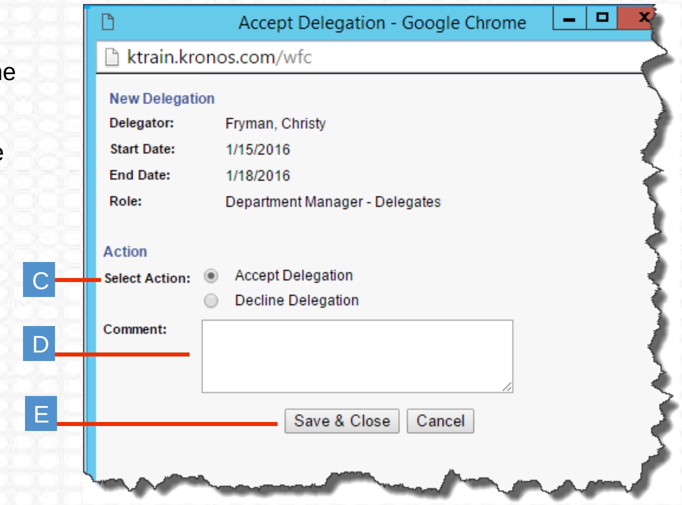
[Continued below]

Alert Notifications

A On the **Request Manager Alert Category** screen, click the **Mgr_Delegation** alert to move to the **Request Manager** screen, populated with that request's information.

B Select the row displaying the alert and click the **Show Detail** button to open the **Accept Delegation** screen.

[Continued below, on the left]



C Enable the **Accept Delegation** option to activate the delegation, or enable the **Decline Delegation** option to refuse the request.

D If appropriate, you can enter text in the **Comment** field. The comment can be viewed in a message that is sent to the manager's Inbox.

E Click the **Save & Close** button.

Acting on a Delegation Request

1. As designee, you can use the switch roles feature to toggle between the other manager's role and your own role. Access the switch role features by clicking the down arrow near the Sign Out link.
2. While the designation is active, the designee can access the manager's Inbox (Tasks and Messages), use the manager's Actions list, and receive and act on some or all of the manager's alerts.