Manager Documentation

Kronos Version 8.0
Alerts and notifications

Depending on your job role, you may have access to alerts and/or notifications in your navigator. Alerts and notifications are displayed at the top of your navigator, in one or more categories. Numbers appearing over the category icons indicate that there are items you should review at your earliest convenience.

Alerts and notifications behave similarly, but there are a few differences.

<table>
<thead>
<tr>
<th>How can I distinguish them?</th>
<th>Is there a detailed message I can view?</th>
<th>When does it stop appearing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert</td>
<td>Alerts have no Dismiss (x) icon.</td>
<td>Alerts automatically disappear when the circumstances generating them no longer apply.</td>
</tr>
<tr>
<td>Notification</td>
<td>Notifications have a Dismiss (x) icon.</td>
<td>Notifications continue to appear until you choose to manually dismiss them.</td>
</tr>
</tbody>
</table>

Reviewing an alert

If there is an alert requiring your attention, a number will appear over the relevant category icon.

**Note:** Alerts and notifications are automatically updated regularly, but you can click the **Refresh** icon to make sure that you are viewing the latest updates.

A. Click the category icon to open the list of alerts in that category.

B. Alerts are contained within sub-categories. If necessary, click the triangle icon to expand a sub-category to view its alerts. In this example, there is only one sub-category (Employee Time Off Request Alert) containing a single alert.

C. Click the alert to open a widget where you can follow up on the alert

**Note:** If you have multiple alerts to review, you can click **View All** to open the Alerts and Notification Widget, which provides you with more space in which to look through your categories and sub-categories.

Reviewing a notification

If there is a notification requiring your attention, a number will appear over the relevant category icon.

A. Click the category icon to open the list of alerts in that category.

B. Notifications are contained within sub-categories. If necessary, click the triangle icon to expand a sub-category to view its alerts. In this example, there is only one sub-category (Timecard Edited by Manager) containing a notification

C. If you would like to open a widget where you can follow up on the notification, click the notification.

D. Click **View All** to open the Alerts and Notification widget.

E. Click Detail to view more detailed information about the notification.

F. If you would like to open a widget where you can follow up on the notification, click the notification. Or, if you would like to permanently dismiss the notification, click its Dismiss (X) icon.

**Note:** Some notifications will appear under the **Uncategorized** icon; these only appear in the Alerts and Notification Widget, and do not open a widget when clicked. You should periodically click **View All** to see if you have any Uncategorized notifications.
Workforce Timekeeper™
Payroll Close Tasks for Managers

Viewing the Pay Period Close Genie

If you have access to the Pay Period Close (PPC) Genie, it may be visible as a selection in the Genie drop-down list.

To access the Pay Period Close Genie, click the Genie drop-down arrow and select it from the list.

Reviewing Employees’ Time

1. In the Pay Period Close Genie, review the data in the columns.
2. To view more details about an employee’s time, double-click the employee’s name to display his/her timecard.

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 time period.
   • If you want to approve timecards for the entire pay period, select Previous Pay Period.
   • If you want to approve timecards for one or more days, select Range of Dates and specify the dates.
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 view the number of managers who have approved an employee’s timecard. The managers’ names might also appear in this Genie.
• 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.

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Accessing Support in the Application
Workforce Central offers the following support resources:

- KnowledgePass
- Online Help

You have access to KnowledgePass and Online Help and 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.

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.
Workforce Central®
Canceling a meal deduction

After employees work a certain number of consecutive hours in a day, it is suggested they take a meal break, and one is automatically deducted from the daily total. If the employee chooses to work through a meal break, and is preapproved by the manager, you can cancel the meal deduction so that the daily total reflects the time that the employee actually worked.

Canceling a meal deduction

1. Access the log on page at nkcschools.kronos.net. Log on using your Credentials (User ID#, district password)
2. Access the Manage My Timecards widget. Find the employee(s) entries in the no meal punch column. Select those employees and click on Go to timecards in the upper right corner.
3. Select a day with an In and Out punch in the timecard.
4. Right-click the Out punch in that row. This is going to open up the Punch Actions call out box (below).
5. In the Punch Actions call out, click the Edit button.

Using the Cancel Deductions drop-down, select ALL.

Click OK and Save

Notice the canceled deduction is marked with a red notation. If you hover, it will show what type of edit was made.
Performing account transfers

1. Access the log on page nkcschools.kronos.net
2. Log on using your credentials (user ID number, district password)
3. Access the Timecard widget.
4. Select a day within the timecard grid.
5. The employee should have clocked in using the timeclock. If the hours are not showing and you have documentation, you may enter the time. In the In cell, enter the time the employee started working, and then press Enter. In the Out cell, enter the time the employee stopped working, and then press Enter.
6. Click the Transfer cell and from the drop-down list, select Search.
7. In the Transfer Callout, click the Labor Account tab.
8. Use the drop-down lists from within the Add Labor Account box to make the required selections. Click Apply.
9. Click Save.

Performing account transfers – partial shift

1. Access the Timecard widget.
2. The employee should have clocked in using the timeclock. If the hours are not showing and you have documentation, you may enter the time. In the In cell, enter the time the employee started working, and then press Enter.
3. In the Out cell, enter the time the employee stopped working, and then press Enter.
4. Click Plus in that row.
5. In the newly added row in the In cell, enter the time the employee started working and press Enter.
6. From the Transfer drop-down list, select the applicable account.
7. In the Out cell of the newly added row, enter the end time for the transfer.
8. Click Save.
Workforce Central
Entering pay codes

The hours entered into a timecard are automatically allocated to a default pay code. If you need to edit hours in a timecard that require a different pay code, for example, vacation or sick time, you can manually add the applicable pay code and the associated hours to your timecard.

In this job aid, you will learn how to manually add pay codes to timecards.

Entering a pay code – full shift

1. Access the log on page at nkcschools.kronos.net
2. Log on using your credentials (user ID#, district password)
3. Access the Timecard widget.
4. In the timecard grid, select a day and click the Pay Code cell.
5. From the Pay Code drop-down list, select the applicable pay code.
6. Click the Amount cell for that day.
7. From the Amount drop-down list, select the applicable amount of time.
8. Click Save.

<table>
<thead>
<tr>
<th>Date</th>
<th>Schedule</th>
<th>In</th>
<th>Out</th>
<th>Transfer</th>
<th>Pay Code</th>
<th>Amount</th>
<th>Shift</th>
<th>Daily</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon</td>
<td>8:00AM-3:00AM</td>
<td>8:00AM</td>
<td>3:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
</tr>
<tr>
<td>Tue</td>
<td>8:00AM-3:00AM</td>
<td>8:00AM</td>
<td>3:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
<td>8:00AM</td>
</tr>
</tbody>
</table>

Entering a pay code – partial shift

1. Access the Timecard widget.
2. In the In cell for the applicable day, enter the time the employee started working.
3. In the Out cell, enter the time they stopped working.
4. Click plus in that row.
5. In the newly added row, click the Pay Code cell.
6. From the Pay Code drop-down list, select the applicable pay code.
7. Click the Amount cell.
8. From the Amount drop-down list, select the applicable amount of time.
9. Click Save.

Note: After you save the timecard, an exception may be generated. Click the cell with the exception, and right click to Add Comments to add an explanation of the exception.
Approving Overtime:
Overtime must be approved, and typically hours will show in the Un-approved time column. Even if you have already added all transfer codes (if applicable) you may still have to approve overtime.

There are two ways you can approve overtime. If the timecard is clean, and all you have to do is approve the overtime, it can be done from your pay period closed genie. This is the pay period closed screen that you see as a manager.

Within the pay period closed genie, select those employees who need to have OT approved (generally click and then hold the command or control button down as you select the rest), then click on Approval, Approve overtime:
The Approve Overtime box will open, be sure you chose the overtime date of Friday, or the last date hours were worked in the week. Leave the amount as All, and click Apply. If there is anytime left in the column, you may need to change the date, or reduce any leave within the week.

If you prefer to approve Overtime within the timecard, select the timecards you want to open, click on the Goto button and choose Timecards.
In the timecard, if there is Overtime to be approved, a little red clock with a checkmark will appear. If you right click on the logo, a box will open allowing you to approve overtime.

There is no right or wrong way – whichever works best for you – as the manager!
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
- 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
- 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.</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 time.

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