



**UVA**Health

**Kronos Manager and  
Timekeeper  
(Non-Advanced Scheduler)**

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# MODULE 1: COURSE ESSENTIALS

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**MODULE OBJECTIVES:**

- Describe the content within the instructor-led course.
- Discuss the format of this course.
- Understand the layout of the reference guide.

## ABOUT THIS COURSE

The instructor-led course is delivered in several short modules. The content of the course is delivered in the same order in which you perform daily and pay period tasks. As you proceed through the course, the Facilitator explains the concepts of each task and then guides you through hands-on practice exercises. Below is an outline of the instructor-led modules that are covered in this class:

## COURSE CALLOUTS

Certain elements of the Workforce Timekeeper application require special attention. The course identifies those elements by using one of the callout boxes displayed below.

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### WARNING

The warning callout identifies potential problems or issues to consider.

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### POLICY

The business policy callout outlines specific policies that need to be followed for specific tasks.

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### ADDITIONAL INFORMATION

The additional information callout provides helpful hints regarding certain tasks.

# MODULE 2: NAVIGATING KRONOS

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**MODULE OBJECTIVES:**

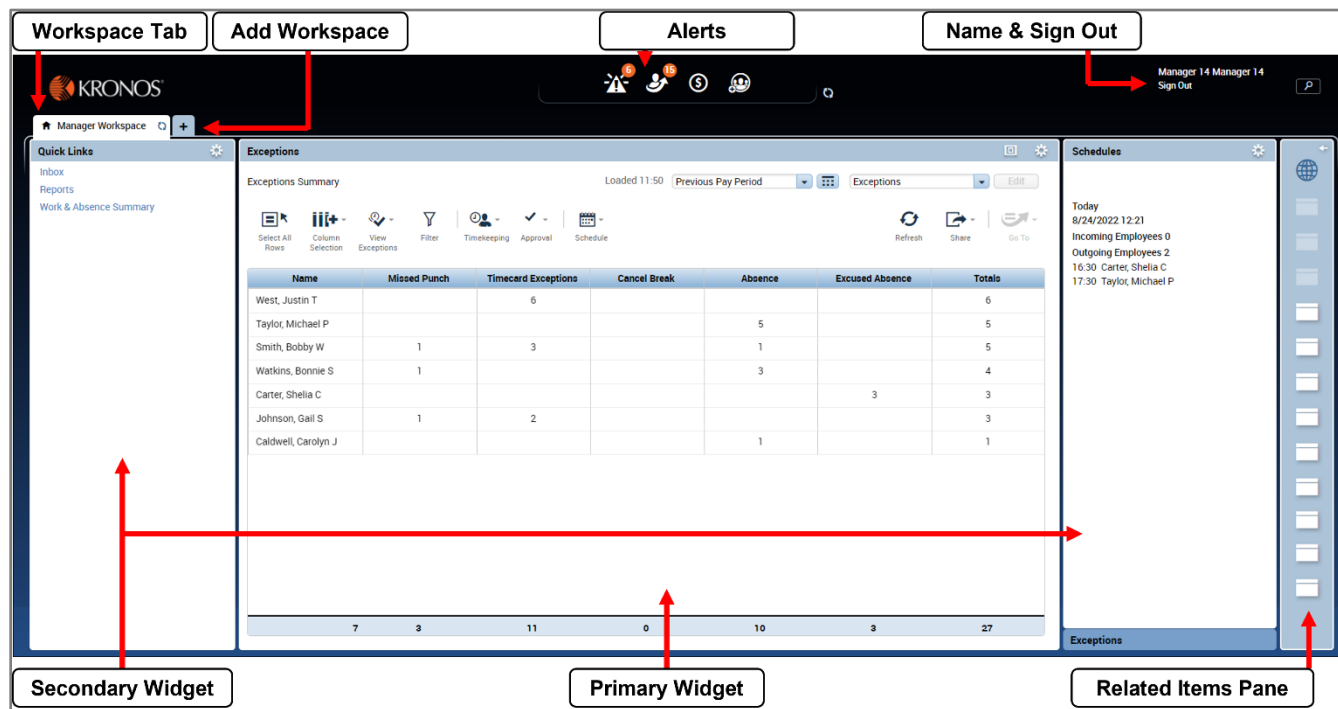
- Identify the components of Navigator.
- Navigate widgets, wizards and genies.

## NAVIGATING KRONOS PAGES

Kronos uses role-based views that include functionality and tasks specific to each user type. The content and components contained on the page vary and are based on the user’s role within the application. The page that displays after you log on is called the **Navigator**. The **Navigator** provides quick and easy access to the tasks you perform on a regular basis.

## THE KEY AREAS OF NAVIGATOR

The Navigator page contains many different parts. Each part of a navigator displays information or provides tools to perform a task.



ELEMENT	DESCRIPTION
<b>Workspace Tab</b>	Each active workspace is identified with a tab. Switch between workspaces by selecting the tab you want to view.
<b>Add Workspace</b>	Contains inactive workspaces to include My Timecard and Leave Cases. A workspace can be opened by selecting it from the list.
<b>Alerts</b>	Displays actionable items that require your immediate attention. The numeric value identifies the number of alerts that currently exist.
<b>Name &amp; Sign Out</b>	Identifies the user and provides a link to log out of Kronos.



ELEMENT	DESCRIPTION
<b>Secondary Widgets</b>	There may be one or more secondary widgets defined in the workspace. These can be promoted to the primary widget position when needed.
<b>Primary Widget</b>	There is one primary widget or screen for each workspace to perform tasks/functions.
<b>Related Items Pane</b>	Inactive widgets, wizards and genies are located on the right side of the primary workspace in the Related Items pane. An inactive item can easily be opened at any time by clicking the item from within the list.

# MODULE 3: SEARCHING FOR INFORMATION

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**MODULE OBJECTIVES:**

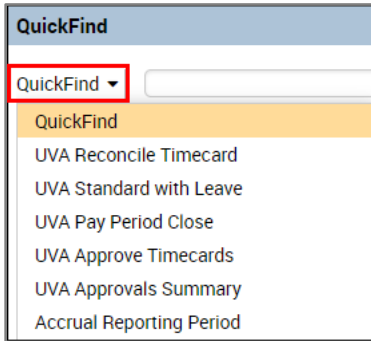
- Access team member data using Kronos genies.
- Create a personal query.
- Search for team member information using the Go To control.

## USING KRONOS GENIES

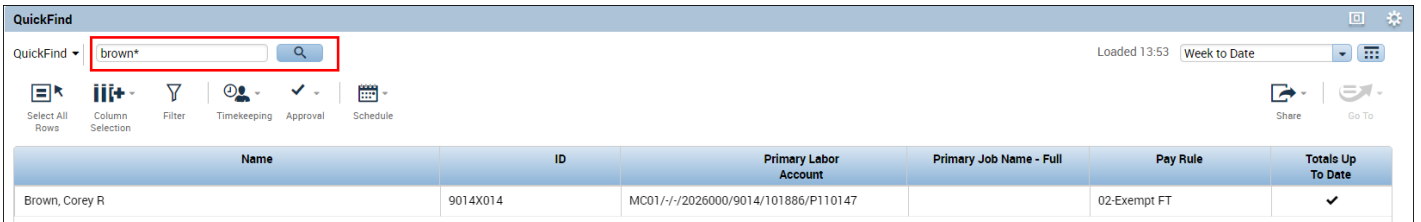
The **QuickFind** widget provides convenient access to genies within the workspace. All of the Genies that you have access to can be found in the **QuickFind** widget.

## ACCESSING QUICKFIND

The QuickFind genie is found in the Related Items pane. Click the QuickFind drop-down arrow to access the rest of the available genies.



To complete the search in QuickFind, type the name, partial name or ID of the team member you are looking for. Then click the magnifying glass icon.



## ADDITIONAL INFORMATION

You can type the first three letters of a last name and the wild card character (\*) to locate a team member.

## CREATING PERSONAL QUERIES

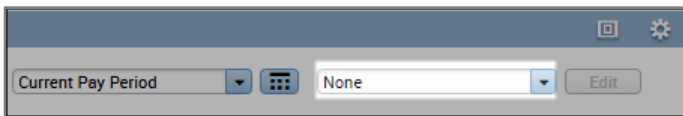
Kronos uses queries in genies, widgets and reports to search for a group of team members that meet a defined criterion. The show drop-down field in the context selector is where you find your listed queries. If an existing query does not return the team members needed, you can create your own ad hoc query. Ad Hoc queries are temporary and are available only during your current session. Once you log off, Ad Hoc queries are no longer available. Instead of creating an Ad Hoc query, a preferred option is to create a personal query. Personal queries are available only to you and remain available until you remove them.

### LEARNING SCENARIO

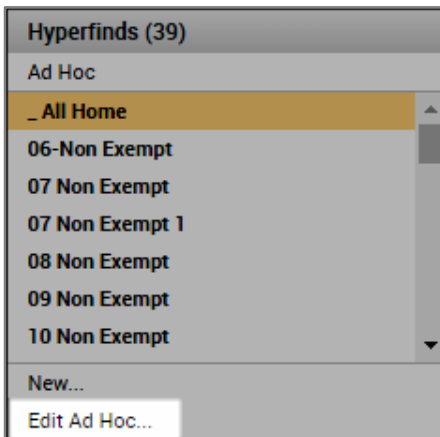
You need to create a personal query to save for later use.

#### CREATE A PERSONAL QUERY

- 1 From the widget, click the drop-down arrow in the **Show** field. The show field is not labeled but is found in the context selector.



- 2 Select Edit Ad Hoc

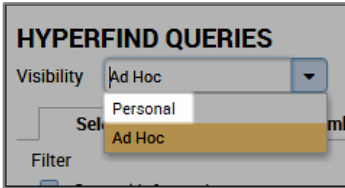


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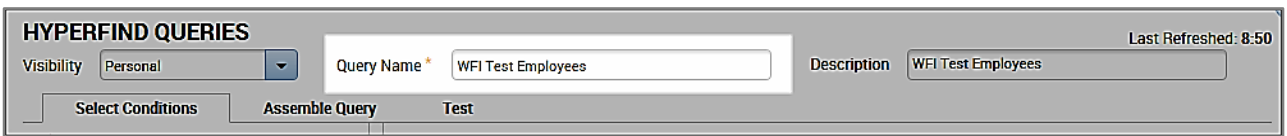
**CREATE A PERSONAL QUERY**

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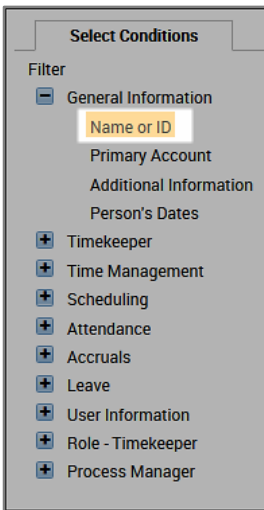
- 3 Click the drop-down arrow next to the **Visibility** field and select **Personal**.



- 4 Enter a name for your personal query in the **Query Name** field. Optionally, you can enter a description in the **Description** field.

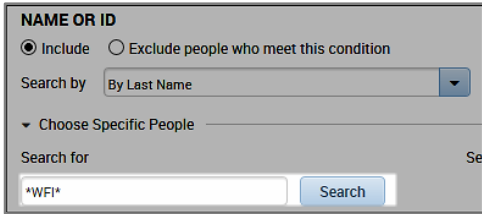


- 5 Select a **Filter** under the **Select Conditions** tab.

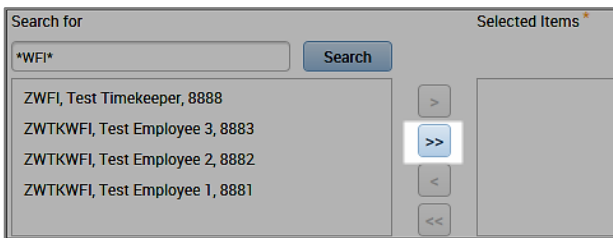


**CREATE A PERSONAL QUERY**

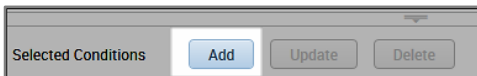
- 6 On the right side of the screen enter your search criteria. You can include or exclude defined criteria. Wildcards are allowed for searching. Click **Search**.



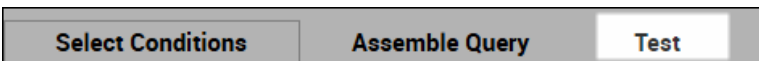
- 7 Use the arrows to select the appropriate criteria and move it to the **Selected Items** field. The double arrow moves all the found criteria.



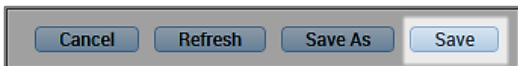
- 8 Click **Add** to add the selected criteria to the query.



- 9 Click the **Test** tab. Make necessary changes to the Selected Conditions, if necessary.

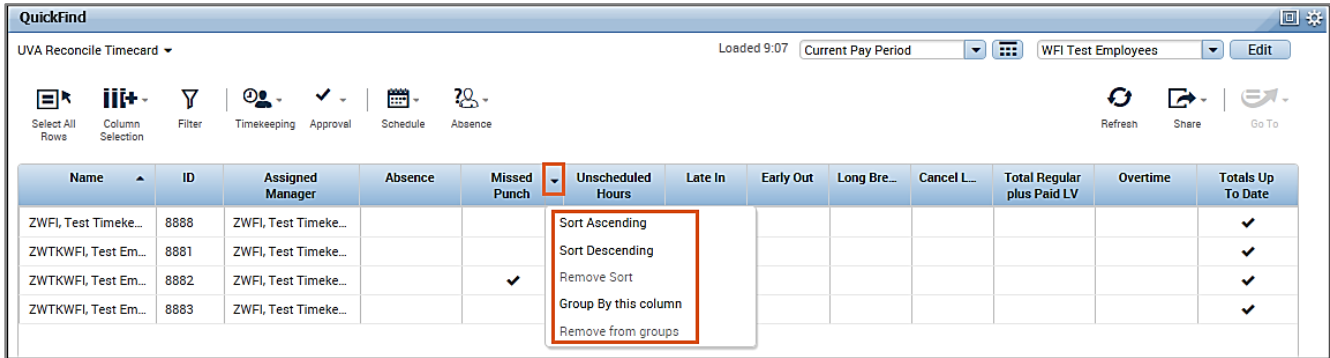


- 10 Click **Save**.



## SORTING AND GROUPING DATA IN A GENIE

Within genies, columns of information can be sorted by clicking the small arrow that displays when hovering over a column header. Options for how to sort or group the data within the column display.

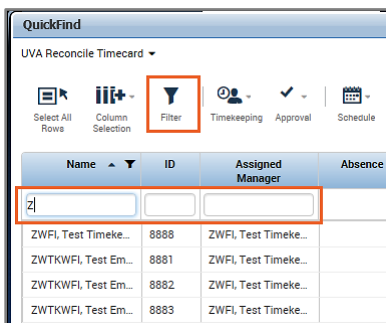


### ADDITIONAL INFORMATION

Click the **Refresh** icon to display the most current information in a genie or to return to the default view.

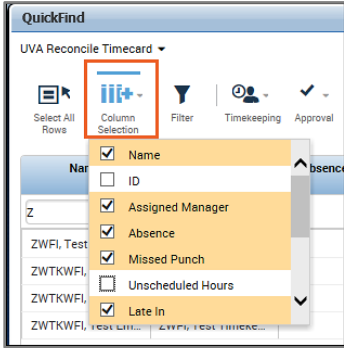
## FILTERING DATA IN A GENIE

The filter function is used to narrow down the number of team member you are viewing within the genie. Click the Filter icon to view the columns that can be filtered. As you type in a field, only rows containing the characters you type remain in the workspace.



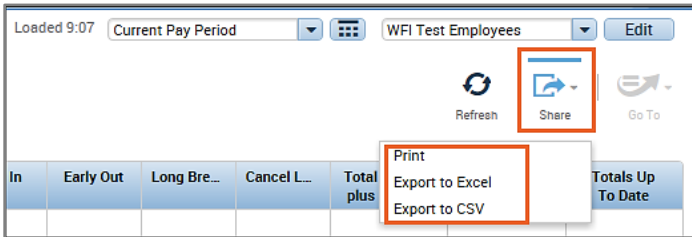
## CUSTOMIZING COLUMNS WITHIN A GENIE

The Column Selection icon displays or hides columns within the genie. Check or uncheck the column heading boxes to add or remove a column from the genie.



## EXPORTING GENIE INFORMATION

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.





## USING THE GO TO CONTROL

You can select one or more team members from a widget and navigate to another Kronos workspace, allowing you to perform a different action or review the information in more detail.

### LEARNING SCENARIO

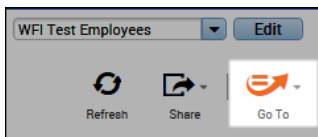
You want to review several team members' timecards at the same time. Use the **Go To** control to access multiple timecards.

#### USE THE GO TO CONTROL

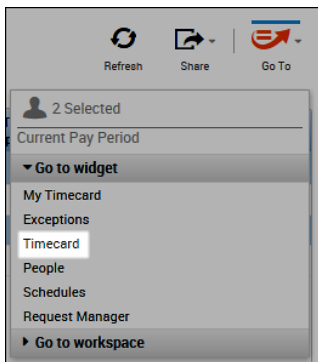
- 1 Click a team member name from within a widget. Hold the **Control** key and click multiple team member names to select more than one team member.

Name	ID	Assigned Manager	Absence	Mis Pu
ZWFI, Test Timeke...	8888	ZWFI, Test Timeke...		
ZWTKWFI, Test Em...	8881	ZWFI, Test Timeke...		
ZWTKWFI, Test Em...	8882	ZWFI, Test Timeke...		
ZWTKWFI, Test Em...	8883	ZWFI, Test Timeke...		

- 2 Click the **Go To** icon in the upper-right corner.



- 3 Select a widget or workspace from the list.



# MODULE 4: SCHEDULING

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**MODULE OBJECTIVES:**

- Provide an overview of scheduling.
- Access the Schedules widget.
- Navigate the Schedules widget.
- Provide an overview of Schedule Patterns.
- Access the Schedule Patterns menu.
- Access shift actions and Shift Templates.
- Provide an overview of schedule transfers.

## SCHEDULING OVERVIEW

Team member scheduling is an important aspect to the overall workforce management process. Scheduling provides additional functionality within the Kronos application including exception tracking and the ability to schedule time off and transfers in advance.

## ACCESS THE SCHEDULES WIDGET

### LEARNING SCENARIO

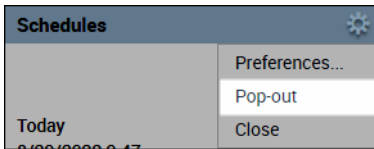
You need to access the **Schedules** widget.

### ACCESS THE SCHEDULES WIDGET

- 1 To make **Schedules** a primary widget, click the **gear** icon in the upper right-hand corner of the widget.

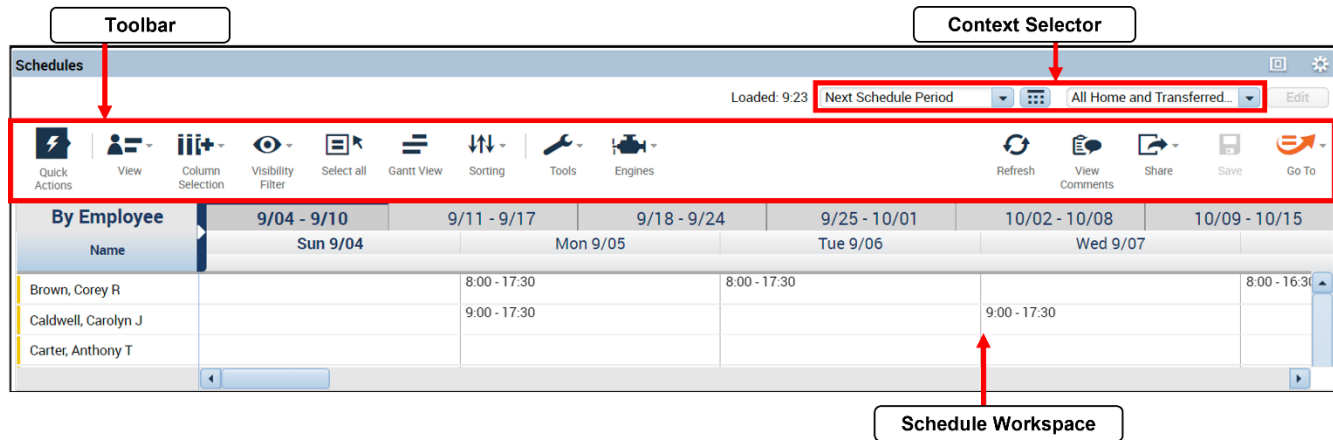


- 2 Select **Pop-out**.



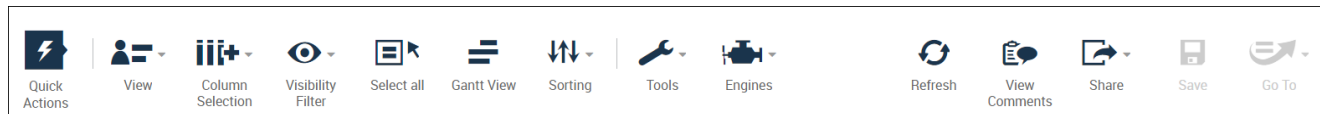
## SCHEDULES WIDGET OVERVIEW

The Schedules widget is used to schedule both worked and non-worked time for team members. The Schedules widget displays schedules in columns and rows by team member name and date. The Schedules widget has three main areas, the Toolbar, Context Selector and Schedule Workspace. Each is discussed below.



## TOOLBAR

The Toolbar of the Schedules widget contains the following components:

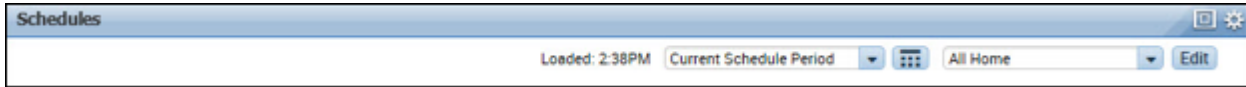


ELEMENT	DESCRIPTION
<b>Quick Actions</b>	Expand Quick Actions to access short cuts to add, edit, delete shifts, and add paycodes using icons. All Quick Actions can be completed using the right-click menu.
<b>View</b>	You can view team member schedule data using either of two different views: <b>By Employee</b> - displays an alphabetical list of team members by name. Includes their daily schedule for the timeframe selected. <b>By Group</b> – displays team members under their schedule group assignment. If a team member is not assigned to a group, they display under the “Ungrouped Employees” category at the top of the workspace.
<b>Column Selection</b>	Allows you to customize the columns within the Schedules widget by showing or hiding specific columns.

ELEMENT	DESCRIPTION
<b>Visibility Filter</b>	Allows you to show or hide information within the schedule grid. You can display or hide items like shift times, pay code names, accrual names, assigned shifts, pay codes, scheduled accrual amounts, and holidays
<b>Select All</b>	Selects all team members in the workspace.
<b>Schedule Views</b>	There are two different schedule views available within Schedules widget. Depending on your preference you can select either Gantt view or Tabular view.
<b>Sorting</b>	Allows you to use pre-configured criteria called procedure sets to sort colleagues.
<b>Engines</b>	Future state scheduling tools.
<b>Refresh</b>	Updates the information in the workspace with the most current data.
<b>View Comments</b>	Displays the any comments associated with shifts or pay codes.
<b>Share</b>	Allows you to print or export the data from the widget into Excel.
<b>Save</b>	Saves any changes to the database. The Save button illuminates when you need to save your changes.
<b>Go To</b>	Allows you to navigate to another Workforce Timekeeper component for team members selected within the schedule grid.

## CONTEXT SELECTOR

The Context Selector allows you to determine which team members display within the schedule grid and for what date range.



ELEMENT	DESCRIPTION
<b>Time Period</b>	Allows you to determine the timeframe you want to view, such as the current schedule period or a next schedule period. The time period you select determines what you see in the workspace.
<b>Calendar Icon</b>	The Calendar icon allows you to select a specific date(s) to display.
<b>Show Field</b>	Allows you to determine which group of team members display in the Schedules widget workspace.

## SCHEDULE WORKSPACE

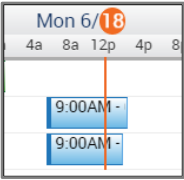

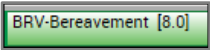
The workspace displays each team member's schedule for the dates selected in the Time Period field. Edits are performed in the workspace. You can view the workspace in either the Gantt View or Tabular View. Both are described below.

### Gantt View

To access the Gantt view, click the View button on the toolbar and select Gantt view.

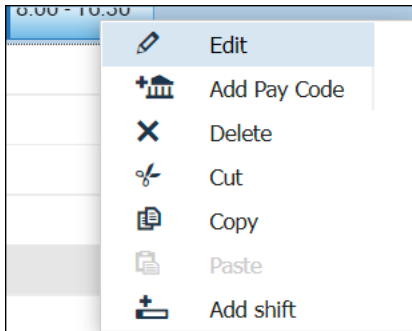
By Employee				8/26 - 9/01	9/02 - 9/08	9/09 - 9/15	9/16 - 9/22	9/23 - 9/29	9/30 - 10/06	
Name	S	Weekly Hours	T	Sun 9/09	Mon 9/10	Tue 9/11	Wed 9/12	Thu 9/13	Fri 9/14	Sat 9/15
ZWTKWFI, Test Employe...	8...	40.00	ZWFI, Test Tim...					BRV-Ber		
ZWTKWFI, Test Employe...	0...	40.00	ZWFI, Test Tim...							
ZWTKWFI, Test Employe...	2...	40.00	ZWFI, Test Tim...		8:00 - 17:0	8:00 - 17:0	8:00 - 17:0	8:00 - 17:0	8:00 - 17:0	

The following table describes the Gantt view indicators and their functions.

INDICATOR	DESCRIPTION
	Orange highlights and vertical line indicate the current date and time.
	Blue cells indicate a normal shift.
	Green cells indicate a scheduled pay code.

### Schedule Grid Tasks

From the schedule grid, you can review schedule data and perform tasks on existing data. Click a cell to edit existing information or right-click on a team member’s name or schedule cell to view detailed information and select actions that you can use to complete multi-step, common scheduling tasks.



ELEMENT	DESCRIPTION
<b>EDIT</b>	Click Edit to add a shift or perform shift edits from the shift editor or attach a comment to a shift.
<b>ADD PAY CODE</b>	Click Add Pay Code and enter data in the applicable fields to schedule a pay code.
<b>DELETE</b>	Click Delete to remove the applicable shift or pay code.
<b>CUT</b>	Click Cut to remove a shift from a team member. The Paste option displays after clicking cut.
<b>COPY</b>	Click to Copy a shift in the schedule. The Paste option displays after clicking copy.

## Kronos Manager and Timekeeper 8.1 Guide


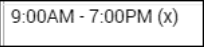
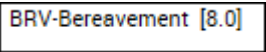
ELEMENT	DESCRIPTION
ADD SHIFT	Assign a new shift to a team member.

### Tabular View

To access the **Tabular view**, click the **Tabular** icon.

By Employee					8/26 - 9/01	9/02 - 9/08	9/09 - 9/15	9/16 - 9/22	9/23 - 9/29	9/30 - 10/06	
Name	S	Weekly Hours	T	Assigned Manager	Sun 9/09	Mon 9/10	Tue 9/11	Wed 9/12	Thu 9/13	Fri 9/14	Sat 9/15
ZWTKWFI, Test Employe...	8...	40.00		ZWFI, Test Tim...					BRV-Bereavement [8.0]		
ZWTKWFI, Test Employe...	0...	40.00		ZWFI, Test Tim...							
ZWTKWFI, Test Employe...	2...	40.00		ZWFI, Test Tim...		8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	

The following table describes the **Tabular view** indicators and their functions.

INDICATOR	DESCRIPTION
	An orange highlight displays the current date.
	An (x) indicates a shift with a labor level or work rule transfer.
	A pay code name within the cell indicates a scheduled pay code.

### ADDITIONAL INFORMATION

- Hover your mouse over a shift cell or a team member name to view more detailed information.
- Hover your cursor over the cell with a transfer to view all transfer details.



## CREATING A HYPERFIND BY DEPARTMENT NUMBER

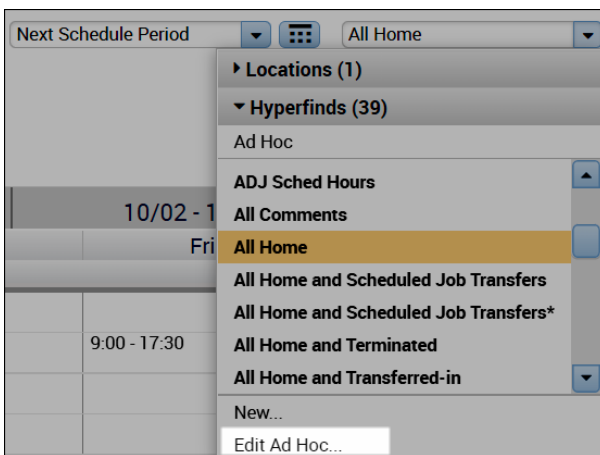
As a scheduler, you may have access to team members at different locations and jobs in the Schedule Planner. From the Context Selector you can select one location and job to view at a time. If you notice you are accessing one particular location and job on a frequent basis you can save it to your drop-down list.

### LEARNING SCENARIO

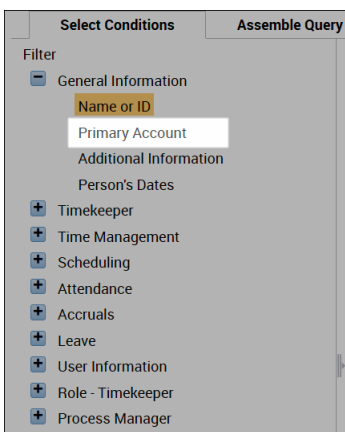
You want to view the schedules of team members in a single location when creating and viewing schedules. You set up saved locations so that you can display the schedules of the most frequently viewed team members with fewer clicks. Set up a Hyperfind query by Department number.

#### CREATING A HYPERFIND BY DEPARTMENT NUMBER

- 1 Click the drop-down arrow in the Hyperfind field and select Edit Ad Hoc.



- 2 From the Select Conditions tab, click Primary Account.



- 3 Click Department.

### CREATING A HYPERFIND BY DEPARTMENT NUMBER

The screenshot shows the 'PRIMARY ACCOUNT' window with the 'Department' tab selected. The 'Include' radio button is selected. Below the tabs, there is a checkbox for 'Select all available entries for all labor levels'. A list of categories is shown: Company, Division, Admin, Department, Timekeeper ..., Job Code, and Position Code.

- 4 Enter the first 4 numbers of the department in the Available Items field and click Search.

The screenshot shows the 'PRIMARY ACCOUNT' window with the 'Department' tab selected. The 'Include' radio button is selected. The 'Available Items' field contains the text '2026\*'. A 'Search' button is visible to the right of the field.

- 5 Select the department and click the right arrow to move the department.

The screenshot shows the 'PRIMARY ACCOUNT' window with the 'Department' tab selected. The 'Include' radio button is selected. The 'Available Items' field contains '2026\*'. Below the field, a list of items is shown, with '2026000,6 Central' selected. A right arrow button is visible to the right of the list.

### CREATING A HYPERFIND BY DEPARTMENT NUMBER

6 Click Add.

**PRIMARY ACCOUNT**  
 Include  Exclude people who meet this condition

Summary Company Division Admin **Department** Timekeeper ... Job Code Position Code

Wild Card Selection

Available Items

Selected Items

Effective Date

Selected Conditions

7 Review the conditions in the Selected Conditions field.

Selected Conditions

User accounts are active as of today  
Employee employed and working as of today  
Primary labor account matches \*/\*/2026000/\*/\*/\* as of today

8 Click the drop-down arrow in the Visibility field and select Personal.

**HYPERFIND QUERIES**

Visibility    
Personal  
Ad Hoc

Query Name \*

### CREATING A HYPERFIND BY DEPARTMENT NUMBER

9 Name the query and add a description.

The screenshot shows the 'HYPERFIND QUERIES' form. The 'Visibility' dropdown is set to 'Personal'. The 'Query Name' field contains 'Unit 2026 Central'. The 'Description' field contains 'All Team Members'.

10 Click Test and verify all data needed displays.

The screenshot shows the 'HYPERFIND QUERIES' form with the 'Test' button highlighted. Below the form, a table displays the results of the query:

Name	Id
Brown, Corey R	9014X014
Carter, Anthony T	9014X015

11 Click Save As.

The screenshot shows a button bar with four buttons: 'Cancel', 'Refresh', 'Save As', and 'Save'. The 'Save As' button is highlighted.

12 The Hyperfind query now displays in the list.

The screenshot shows a list view with the following items:

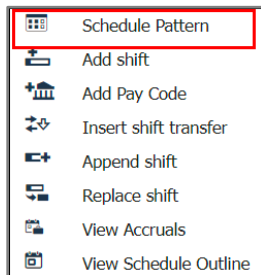
- Locations (1)
- ▼ Hyperfinds (43)
- Ad Hoc
- Unexcused Absence Unpaid Hyper**
- Unit 2026 Central
- UVA Exempt Employees
- UVA Magnet Report
- New...
- Edit Ad Hoc...

## SCHEDULE PATTERN OVERVIEW

The *Schedules* widget allows you to instantly assign a schedule pattern to team members who work repeatable shifts on a regular basis. Once a pattern is applied to a team member’s schedule, it repeats the predefined shifts and days until an end date is defined or the pattern is deleted or overridden by another pattern. There are two methods for using *schedule patterns*: 1) inserting a predefined *pattern template* or 2) creating an ad hoc pattern by manually entering shift days and times. In both cases, schedule patterns help you quickly assign schedules to team members for a defined period of time.

## ACCESSING SCHEDULE PATTERNS

The *Schedule Pattern* action is found in the contextual call out menu. To access the menu, right-click on the team member name, click the **Schedule Pattern** action to bring up the *Schedule Pattern editor*.



### Schedule Pattern

Assigned to  
Brown, Corey R Primary job None

Start Date	End Date	Duration	Rotation

Add Pattern

Anchor Date:\* 9/04/2022 Start Date:\* 9/04/2022 End Date:\*  Clear

Forever

Define Pattern for:\*   Week(s)  Day(s)  Override Other Patterns

Add Shift | Add Pay Code | Shift Template | Pattern Template

Items in rotation  Find

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
+ x 1							

Cancel Apply

## SHIFT ACTIONS

*Shift actions* are the same as the previous version, however, how you access the menus to complete those actions are different. There are three ways to access the contextual dialogue box:

- Right-click on the team member name
- Right-click on an existing shift
- Right-click on an empty shift cell

Employee Menu	Shift Menu – Existing Shift	Shift Menu – Empty Cell
<ul style="list-style-type: none"> <li> Schedule Pattern</li> <li> Add shift</li> <li> Add Pay Code</li> <li> Insert shift transfer</li> <li> Append shift</li> <li> Replace shift</li> <li> View Accruals</li> <li> View Schedule Outline</li> </ul>	<ul style="list-style-type: none"> <li> Edit</li> <li> Add Pay Code</li> <li> Delete</li> <li> Cut</li> <li> Copy</li> <li> Paste</li> <li> Add shift</li> </ul>	<ul style="list-style-type: none"> <li> Add shift</li> <li> Add Pay Code</li> <li> Insert shift template</li> <li> Restore</li> <li> Paste</li> </ul>

## SHIFT TEMPLATES

You can enter shifts using a predefined *shift template*. Use the **Insert Shift Template** dialog box to quickly assign a common shift to one or more team members for a specific time period. Access the **Insert Shift Template** action by right-clicking the date cell. The search function allows easy searching of *shift templates*.

- Add shift
- Add Pay Code
- Insert shift template
- Restore
- Paste

### Insert Shift Template

**Name:** Brown, Corey R  
**Job:**  
**Job path:**

Search...

Name	Description
0816h	0800-1630
0817h	0800-1730
08h17	0830-1700
0917h	0900-1730
Salary 8a-4p	Salary 8a-4p

Cancel

**Shift Codes:**

q=quarter=:15  
h=half=:30  
t=three quarters=:45

**Example:**

3q15t=315a-345p

Numbers in military time

## TRANSFERS OVERVIEW

Throughout a shift, a team member punches for the time they work. Time is allocated to their default labor account and work rule assignment. Transfers allow you to allocate hours to an alternate labor account to charge the hours where they are worked. This process is useful when team members work in different departments.

When you schedule a work rule transfer, Kronos application applies a different set of rules to the team member's shift when calculating hours. This feature allows certain worked time to calculate differently than other worked time.

If the transfer is known in advance, it is entered into the schedule. When a team member punches in and out, the hours are automatically allocated according to the scheduled transfer. Entering transfers in the Schedule is preferred over entering them into the team member's timecard. You can schedule transfers for part of a shift or the entire shift.

- A labor level transfer is used to change **WHERE** a team member's hours are charged (Department and/or Job)
- A Work Rule transfer is used to change **HOW** a team member's hours are calculated (for example, Charge, Orientation, Education, On Call, etc.)

## TRANSFER FIELDS

Use the appropriate transfer fields to transfer a team member's time to a new Work Rule, or job. When you click the transfer field, a list of the most recent transfers you used are displayed. You can select a transfer from this list or click Search to display the Select Transfer dialog box.

Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Work Rule Transfer
9/12/2018	Regular	7:00	15:30	9/12/2018	8.50		

## ADDITIONAL INFORMATION

Transfers are discussed in greater detail within the Working with Shifts section of the guide.

# MODULE 5: WORKING WITH SCHEDULE PATTERNS

---

**MODULE OBJECTIVES:**

- Describe the purpose of schedule patterns.
- Navigate the Pattern Editor.
- Build a schedule using a pattern template.
- Create a schedule without a template.
- Edit a team member's schedule.
- Remove a pattern from a team member's schedule.



## SCHEDULE PATTERN OVERVIEW

The Schedules widget allows you to instantly assign a schedule pattern to team members who work repeatable shifts on a regular basis. Once a pattern is applied to a team member’s schedule, it repeats the predefined shifts and days until an end date is defined or the pattern is deleted or overridden by another pattern. There are two methods for using schedule patterns: 1) inserting a predefined pattern template, or 2) creating an ad hoc pattern by manually entering shift days and times. In both cases, schedule patterns help you quickly assign schedules to team members for a defined period of time.

## SCHEDULE PATTERN EDITOR

The Pattern Editor allows you to view, add, modify or delete a team member’s schedule pattern. The graphic below illustrates the layout of the Schedule Pattern Editor workspace.

The screenshot shows the 'Schedule Pattern' editor interface. At the top, a box labeled 'Effective Dates' has a red arrow pointing to the 'Anchor Date', 'Start Date', and 'End Date' fields. Below this is a table with columns for 'Start Date', 'End Date', 'Duration', and 'Rotation'. The 'Add Pattern' section includes 'Anchor Date', 'Start Date', 'End Date', and a 'Forever' radio button. A red box highlights the 'Define Pattern for' section, which includes a numeric input (set to 1), radio buttons for 'Week(s)' and 'Day(s)', and an 'Override Other Patterns' checkbox. Below this are buttons for 'Add Shift', 'Add Pay Code', 'Shift Template', and 'Pattern Template', along with a search field containing '8-1630' and a 'Find' button. The 'Shift Workspace' is a grid with columns for days of the week (Sunday to Saturday) and rows for shift patterns. The '8-1630' shift is assigned to Monday, Wednesday, and Friday. A box labeled 'Edit Options' has a red arrow pointing to the '+' and 'x' icons in the first row. Another box labeled 'Shift Workspace' has a red arrow pointing to the '8-1630' shift on Friday. 'Cancel' and 'Apply' buttons are at the bottom right.

ELEMENT	DESCRIPTION
<b>Effective Dates</b>	<p>Assigns start and end dates to the schedule pattern.</p> <ul style="list-style-type: none"> <li>• <b>Start Date</b> - The date in which the team member begins working the schedule pattern.</li> <li>• <b>End Date</b> - When you know the team member’s schedule is changing at a specific point in time, enter the date the schedule pattern ends.</li> </ul>

ELEMENT	DESCRIPTION
<b>Edit Options</b>	<ul style="list-style-type: none"> <li>• <b>Forever</b> - Select when there is no foreseeable end to the team member's schedule.</li> <li>• <b>Define Pattern</b> - Allows you to define the rotation frequency and assigns shift times and details to the days in the rotation.</li> </ul> <p>The various buttons provide access to edit the pattern.</p> <ul style="list-style-type: none"> <li>• <b>Shift Template</b> and <b>Pattern Template</b> links provide access to pre-built shifts and patterns.</li> <li>• <b>Comment</b> link allows you to associate comments with shifts.</li> <li>• <b>Copy/Paste</b> allows access to copy and paste shifts.</li> <li>• <b>Delete</b> link allows user to delete unwanted shifts.</li> </ul>
<b>Shift Workspace</b>	Review schedule data and perform tasks on existing data. The information in the grid does vary depending on the selected viewing options.

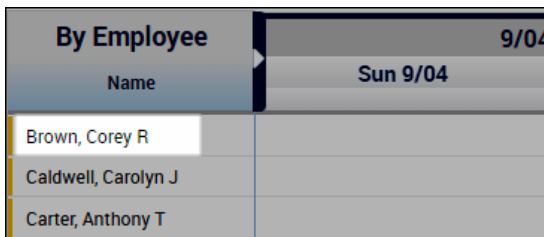
## ASSIGNING A PATTERN TEMPLATE

### LEARNING SCENARIO

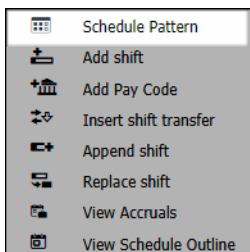
You have a team member who works the same shifts on the same days every week. To make scheduling quicker, insert a predefined pattern template to the team member's schedule. Set the end date to Forever.

#### ASSIGN A PATTERN TEMPLATE

- 1 Right-click the team member's name in the **Schedules** widget.



- 2 Select **Schedule Pattern**.



- 3 Click the **Calendar** icon in the Start Date field and select the effective date on which the team member begins working the pattern.

**ASSIGN A PATTERN TEMPLATE**

- 4 Click the **Calendar** icon in the End Date field and select the last effective date of the pattern. To have the pattern in effect with no end date, select **Forever**.

- 5 Click **Pattern Template** and select a template from the list.

Name	Description
M-F 8a-17a	Monday-Friday 0800-1700
Mon-Fri, 7a-3...	Monday - Friday, 0700-1530
Mon-Fri, 8a-4...	Monday - Friday, 0800-1630
Mon-Fri, 9a-5...	Monday - Friday, 0900-1730
Retail Pharm...	16 week Wknd Rotation

- 6 Click **Apply**.

- 8 Verify the pattern displays for the correct dates and click **OK**.

Start Date	End Date	Duration	Rotation
9/04/2022	Forever	1 week	1 Week:8 - 1630(Mon,Tue,Wed,Thu,Fri)

- 9 Click **Save**.

## CREATING A SCHEDULE PATTERN WITHOUT A TEMPLATE

If a pattern template is not available in the drop-down list, you can build an ad hoc pattern for a team member. The ad hoc pattern is assigned to the selected team member; it cannot be saved and assigned to team members at a later time.

### LEARNING SCENARIO

You have a team member who works different shifts in different weeks, but there is not a pattern template for the specific schedule. You create a single-use pattern for a team member. Create a pattern to accommodate the following schedule:

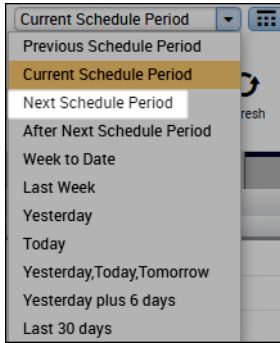
Week	Day	Assignment	Shift Time
1	Sunday	Night	1845-0715
1	Tuesday	Day	0845-2115
1	Thursday	Day	0845-2115
2	Tuesday	Day	0845-2115
2	Friday	Night	1845-0715
2	Saturday	Night	1845-0715

---

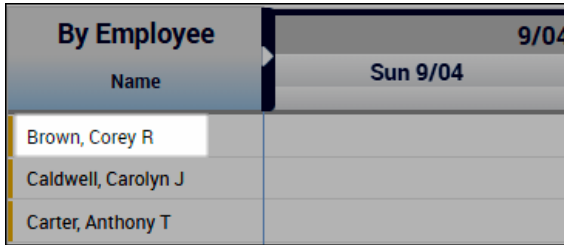
**CREATE A SCHEDULE PATTERN WITHOUT A TEMPLATE**

---

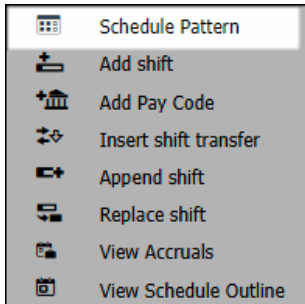
- 1 Click the drop-down arrow in the **Time Period** field and select the timeframe the pattern begins.



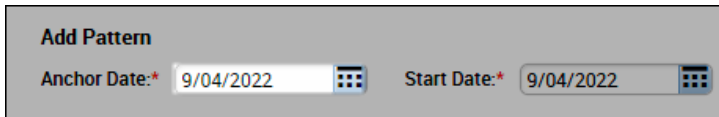
- 2 Right-click the team member's name in the **Schedules** widget.



- 3 Select **Schedule Pattern**.



- 4 Click the **Calendar** icon in the Anchor Date field and select the effective date on which the team member begins working the pattern.



**CREATE A SCHEDULE PATTERN WITHOUT A TEMPLATE**

5 Click the **Calendar** icon in the Start Date field and select the effective date on which the pattern starts.

Start Date:\* 9/04/2022 [Calendar icon] End Date:\* [Calendar icon] Clear  
 Forever

6 Click the **Calendar** icon in the End Date field and select the last effective date of the pattern. To have the pattern in effect with no end date, select **Forever**.

Start Date:\* 9/04/2022 [Calendar icon] End Date:\* [Calendar icon] Clear  
 Forever

7 Set the **Define Pattern for** field to either **Days** or **Weeks**, and enter the number of days or weeks the pattern repeats.

Define Pattern for:\* 2  Week(s)  Day(s)

8 Click the **Day** cell for the day you want to add a shift. Enter shift start and end times separated by a hyphen (i.e., 1845-0715).

	No.	Sunday
+ x	1	1845-715
+ x	2	

9 Continue adding shifts for the remainder of the scheduled days within the pattern.

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	1845-715		845-2115		845-2115		
2			845-2115			1845-715	1845-715

10 Click **Apply**.

Cancel Apply

11 Verify the pattern displays for the correct dates and click **OK**.

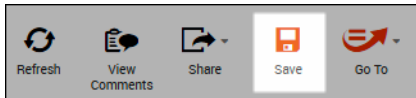
**CREATE A SCHEDULE PATTERN WITHOUT A TEMPLATE**

### Schedule Pattern

Assigned to  
**Jones, Sharon R** Primary job None

	Start Date	End Date	Duration	Rotation
<input type="checkbox"/>	9/04/2022	Forever	2 weeks	2 Weeks:1845 - 715(Sun,Fri,Sat),845 - 2115(Tue,Thu,Tue)

13 Click **Save**.



**ADDITIONAL INFORMATION**

You can double-click the team member name at any time to make any necessary pattern adjustments. If the full Schedule Pattern editor displays instead of the above screen, then the team member does not have a pattern assigned.

# MODULE 6: WORKING WITH SHIFTS

---

**MODULE OBJECTIVES:**

- Describe the methods available for adding and editing shifts.
- Insert a shift template.
- Describe the purpose of pay codes.
- Schedule time using pay code edits.
- Describe the purpose of transfers.
- Schedule labor account and work rule transfers.



## ADDING SHIFTS

The Schedules widget provides different methods for adding shifts into team member schedules depending on the situation. You can add shifts using one of the following methods:

1. In-cell entry – used for adding simple shifts that include only a shift start and end time. Shift start and end times are entered directly in the date cell.
2. Shift Templates – used when entering a common shift in which a shift template has already been created.
3. Shift Editor – used when adding more complex shifts that contain specific shift attributes (i.e., shifts with transfers, etc.).

## INSERTING A SHIFT TEMPLATE






### LEARNING SCENARIO

Several team member works a common shift from 0800-1630. Since the shift is used often, there is a shift template already created. Insert the shift template.

#### INSERT A SHIFT TEMPLATE

1. Locate the team member’s row and right-click the cell under the date where you want to add a shift. Select Add Shift.

By Employee Name	9/04 - 9/10			
	Sun 9/04	Mon 9/05	Tue 9/06	W
Brown, Corey R		8:00 - 17:30	8:00 - 17:30	
Caldwell, Carolyn J		9:00 - 17:30		9:00
Carter, Anthony T				
Carter, Shelia C		8:00 - 16:30		
Davis, Valerie A				
Jackson, Erica A				
Johnson, Gail S				

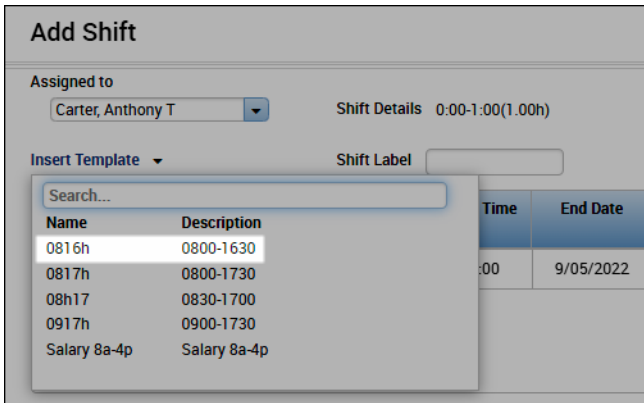
-  Add shift
-  Add Pay Code
-  Insert shift template
-  Restore
-  Paste

---

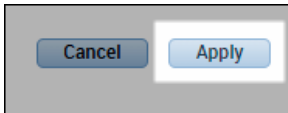
**INSERT A SHIFT TEMPLATE**

---

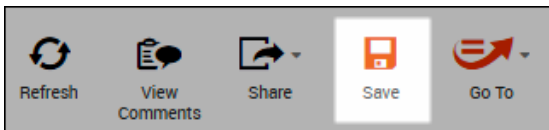
- 2 Click drop-down arrow in the Insert Template field and select a template from the list.



- 3 Click Apply.



- 4 Click Save.



---

**ADDITIONAL INFORMATION**

If you determine that a team member's shift needs to be shortened or lengthened, you can edit the shift start or end times accordingly.

## DELETING SHIFTS

If a team member is no longer working a specific shift, you can delete the shift from the schedule. If the team member's schedule changes, it is important to update the Schedules widget accordingly so the team member does not receive an exception in the timecard.

### LEARNING SCENARIO

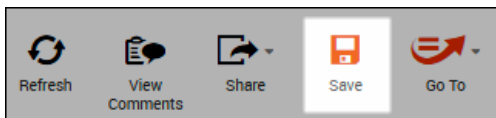
A team member is no longer working the 0800-1630 shift, so you must delete the shift.

#### DELETE A SHIFT

- 1 Right-click the date cell for the team member whose shift you want to delete. Select **Delete**.

By Employee Name	9/04 - 9/10			
	Sun 9/04	Mon 9/05	Tue 9/06	W
Brown, Corey R		8:00 - 17:30	8:00 - 17:30	
Caldwell, Carolyn J		9:00 - 17:30		9:00 -
Carter, Anthony T		8:00 - 16:30		
Carter, Shelia C		8:00 - 16:30		0-
Davis, Valerie A				0-
Jackson, Erica A				
Johnson, Gail S				
Jones, Sharon R				
Manager 14, Manager 14				

- 2 Click **Save**.



## SCHEDULING A PAY CODE AMOUNT

Entering a pay code into a team member’s schedule allows you to schedule non-worked time. Non-worked hours include sick time and vacation or paid time off. You should schedule your team members’ non-worked time when you know about it in advance. Once the scheduled date becomes part of the current pay period, the pay code amount automatically populates the team member’s timecard.






### LEARNING SCENARIO

A team member is going to be on vacation on Friday. You want to schedule a pay code amount in the team member’s schedule as a reminder of the absence, but more importantly to populate the team member’s timecard accordingly.

#### SCHEDULE A PAY CODE AMOUNT

- 1 Locate the team member’s row and right-click the date to which you want to enter a pay code amount. Select **Add Pay Code**.

By Employee Name	9/04 - 9/10			
	Sun 9/04	Mon 9/05	Tue 9/06	Wed 9/07
Brown, Corey R		8:00 - 17:30	8:00 - 17:30	
Caldwell, Carolyn J		9:00 - 17:30		9:00
Carter, Anthony T				
Carter, Shelia C		8:00 - 16:00		
Davis, Valerie A				
Jackson, Erica A				
Johnson, Gail S				

-  Add shift
-  Add Pay Code
-  Insert shift template
-  Restore
-  Paste

- 2 Confirm the date selected in the **Effective Date** field is correct.

**Add Pay Code**

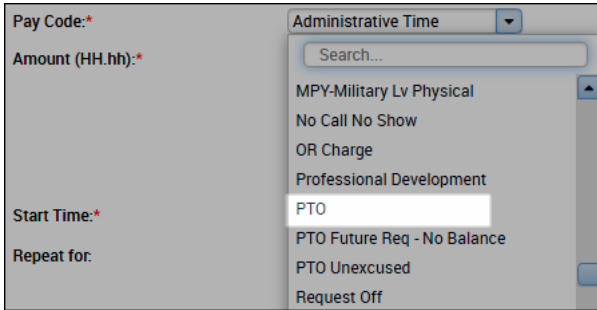
Assigned to  
Carter, Anthony T

Effective Date:\*

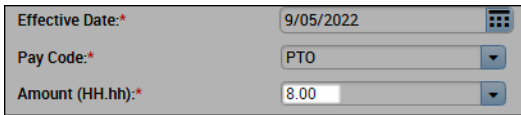
Pay Code:\*

**SCHEDULE A PAY CODE AMOUNT**

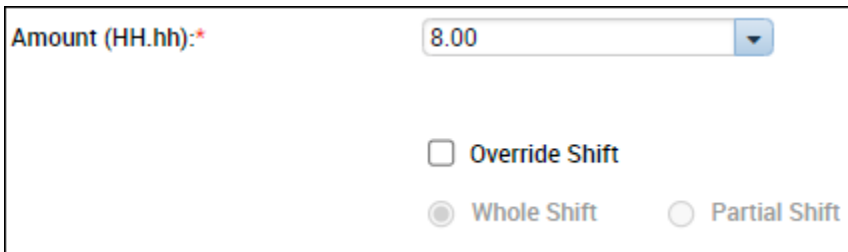
3 From the **Pay Code** drop-down list, select the pay code.



4 Enter the number of hours to allocate to the pay code in the **Amount** field.



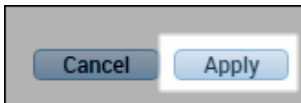
5 If the pay code amount must replace the team member's existing shift, select the **Override Shift** check box. To override the entire shift, select **Whole Shift**. To override part of the scheduled shift, select **Partial Shift**.



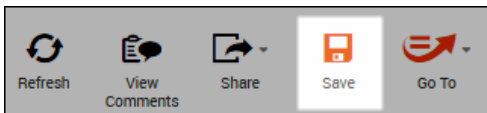
6 In the **Start Time** field, enter the effective time for the pay code amount. If the team member already has a schedule, the shift start time is the default time



7 Click **Apply**.



8 Click **Save**.



## TRANSFERS OVERVIEW

Throughout a shift, and team member punches for the time they work and that time is allocated to their default labor account and work rule assignment along with any non-worked hours. Transfers allow you to allocate hours to an alternate labor account in order to charge the hours where they are worked. This process is useful when team members work in different cost centers or at different locations.

When you schedule a work rule transfer, the Kronos application applies a different set of rules to the team member’s shift when calculating hours. This feature allows certain worked time to calculate differently than other worked time.

If the transfer is known in advance, it is entered into the schedule. When a team member punches in and out, the hours are automatically allocated according to the scheduled transfer.

## SCHEDULING LABOR ACCOUNT TRANSFERS

### LEARNING SCENARIO

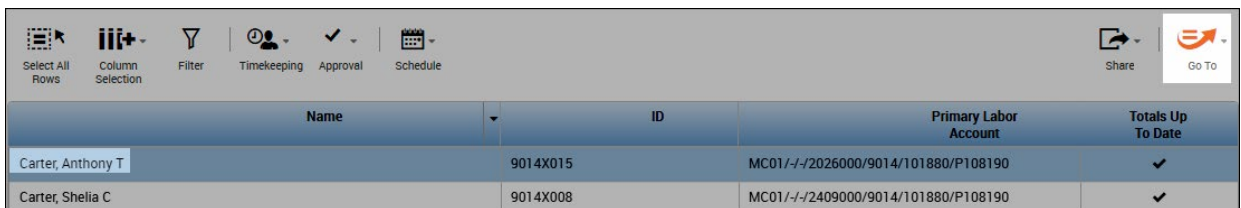
A team member is going to work in a different department one day in the next schedule period. In order for labor to be allocated correctly, you need to schedule the team member in the department where the team member is working. Create a shift and include a Labor Account transfer.

#### SCHEDULE A LABOR ACCOUNT TRANSFER

- 1 From the **Quickfind** widget, locate the team member.

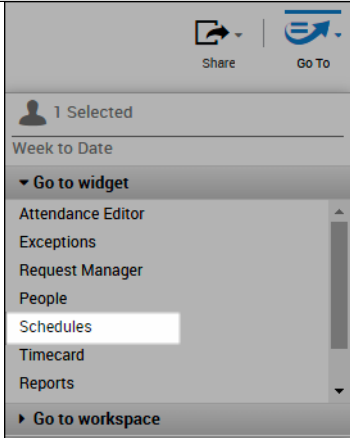


- 2 Highlight the team member and click **Go To**.

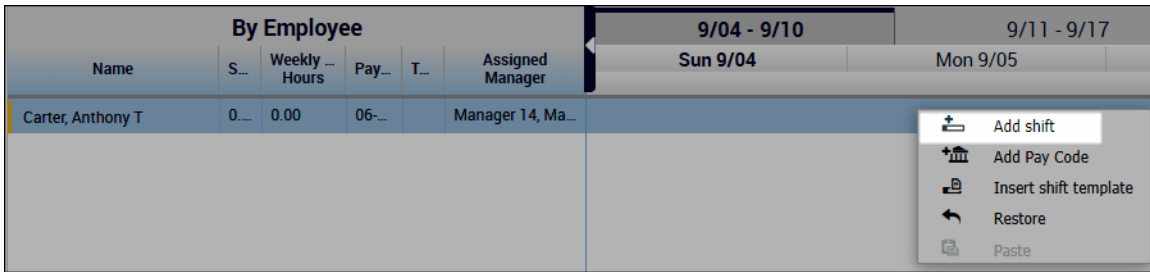


- 3 Select **Schedules**.

**SCHEDULE A LABOR ACCOUNT TRANSFER**



- 4 Right-click the date the team member to which you want to enter the transfer and select **Add shift**.



- 5 In the **Start Time** field, enter the time the shift transfer begins.

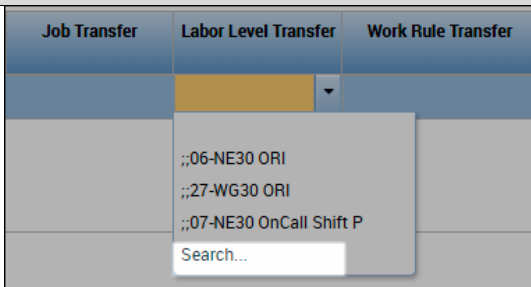
Start Date	Type	Start Time
9/05/2022	Regular	0800

- 6 In the **End Time** field, enter the time the shift transfer ends.

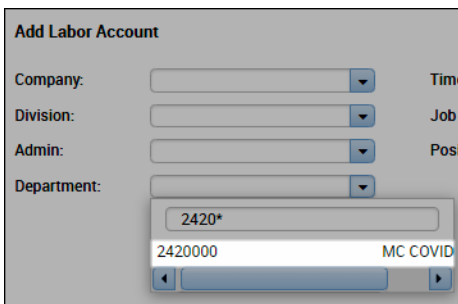
Type	Start Time	End Time
Regular	8:00	1630

- 7 Click the **Labor Level Transfer** field and select the applicable Labor Account from the list. If the labor account does not display, click **Search**.

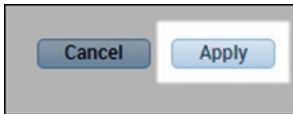
**SCHEDULE A LABOR ACCOUNT TRANSFER**



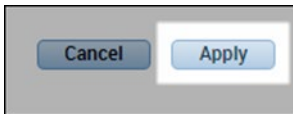
- 8 Click the drop-down arrow for the labor level for which you want to transfer and select a labor entry from the list. Alternatively, you can search for labor levels using the Search feature for each field.



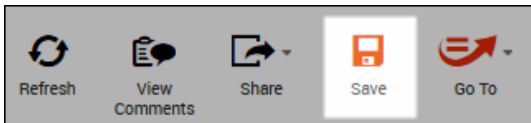
- 9 Click **Apply** on the **Transfer** dialog box.



- 10 Click **Apply** again on the **Add Shift** dialog box.



- 11 Click **Save**.





## SCHEDULING ON-CALL

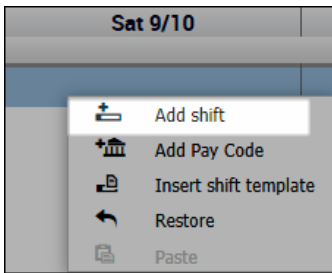
When team members are assigned an on-call shift, their hours are calculated differently for the time they are on call and for the time they are called in. As a result, you need to do a job transfer in the schedule for the team member's hours to be calculated and paid accurately. To schedule on-call simply add a new shift with a work rule transfer or edit an existing shift to add the work rule transfer.

### LEARNING SCENARIO

You need to schedule a team member for an on call shift the first weekend of the next schedule period. Add a shift and schedule an On-Call transfer.

#### SCHEDULE ON-CALL

- 1 **Right-click** the Date cell you want to schedule On-Call and select Add shift.



- 2 Click the **Start Time field** and enter the time the shift begins.

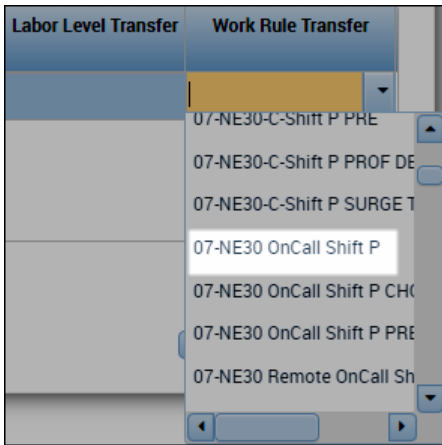
	Start Date	Type	Start Time
+ x	9/10/2022	Regular	0800

- 4 Click the **End Time field** and enter the time the shift ends.

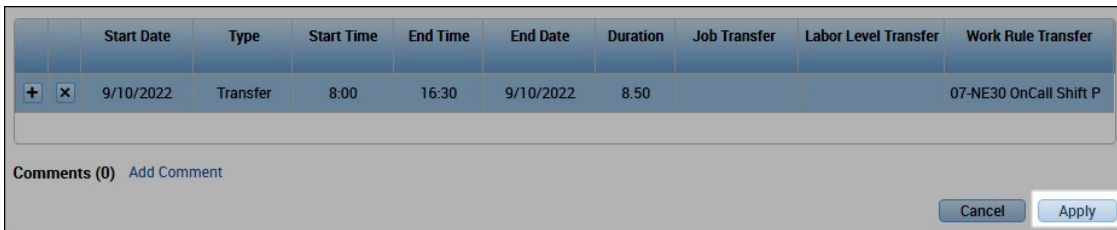
Start Date	Type	Start Time	End Time
9/10/2022	Regular	8:00	1630

**SCHEDULE ON-CALL**

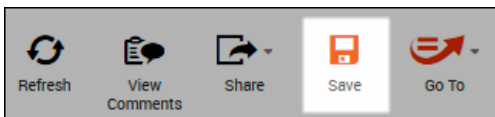
5 Click the **Work Rule Transfer** field and select the applicable Work Rule from the list.



6 Verify the information and click **Apply**.



9 Click **Save**.



# MODULE 7: ALERTS & DAILY TIME REVIEW

---

**MODULE OBJECTIVES:**

- Describe the purpose of exceptions.
- Use Alerts to view team member exceptions.
- Access the Punch Issues widget to review exception data.
- Navigate the Punch Issues widget Summary and Detail views.

## REVIEWING TEAM MEMBER EXCEPTIONS

It is necessary to recognize and resolve the most common types of exceptions on a daily basis. This process helps ensure that each team member's timecard is complete and accurate. Reviewing and acknowledging attendance exceptions assists Managers with monitoring their department performance. You can review exceptions using either alerts or widgets.

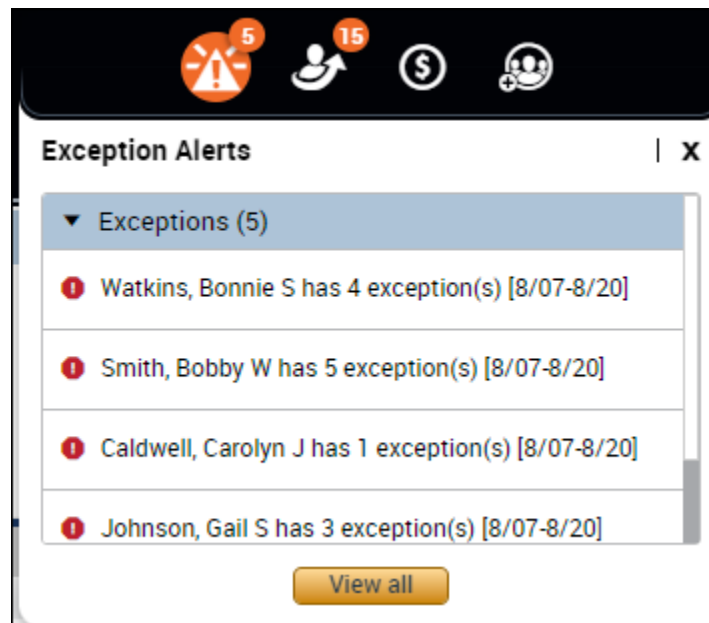
## USING ALERTS

Alerts help expedite your common tasks by highlighting those issues that require attention. The numeric value in the upper right corner of the alert identifies the number of team members that currently have an alert. The Exceptions alert highlights any team member who has deviated from their schedule. The Time-Off Request alert displays any time-off requests that need review and approval. Alerts are primarily used to view information for one team member at a time.



## ACCESSING ALERT INFORMATION

More detailed information is available from each alert icon. To view more details about the alerts, click the icon. When an alert is selected the corresponding widget becomes active in the center of the workspace. Any exceptions can be reviewed and addressed from the current screen.



## LEARNING SCENARIO

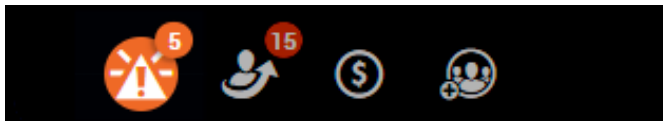
After logging into the system you notice there are several exception alerts that need your immediate attention. You would like to review the exceptions for each individual team member.

### REVIEW EXCEPTIONS USING ALERTS

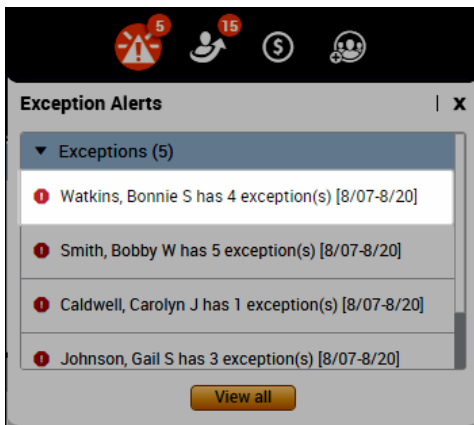
- 1 Click the **Refresh** button to get up-to-date data.



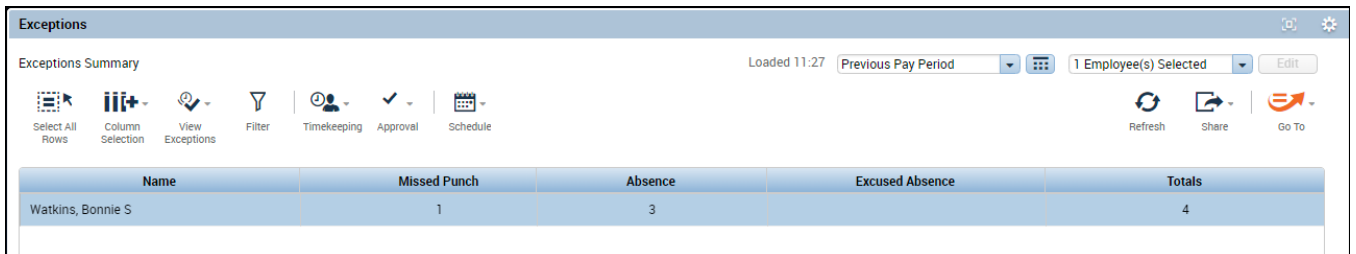
- 2 Click the **Exceptions** alert icon.



- 3 Select a team member from the drop-down list.

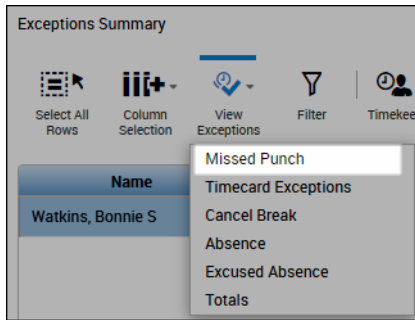


- 4 The **Exceptions widget** is automatically activated for the team member.



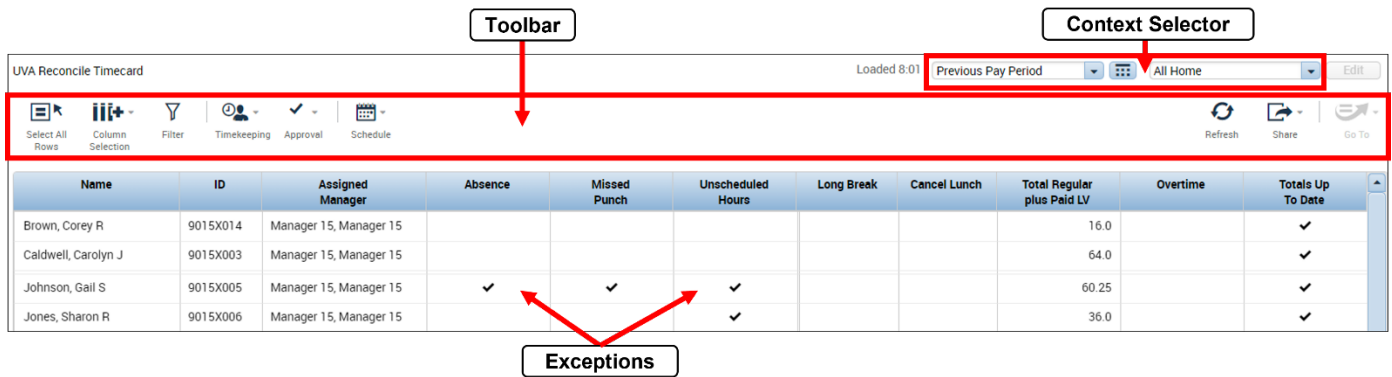
**REVIEW EXCEPTIONS USING ALERTS**

5 Click **View Exceptions** and select the appropriate exception to view in the team member’s timecard.



**THE RECONCILE TIMECARD GENIE**

The Reconcile Timecard genie provides important information about team members’ time so you can view actual worked time to the scheduled time, along with any punch exceptions. The exceptions are categorized by type and contain a check mark to represent an exception exists for the specified team member and time period. By default, the Reconcile Timecard genie displays data for the current pay period, for all of the active team members assigned to you.



ELEMENT	DESCRIPTION
<b>Toolbar</b>	Action buttons allow you to perform edits or tasks within the Exceptions widget.
<b>Context Selectors</b>	<b>Date:</b> Allows you to select the timeframe for which you are viewing data. <b>Show Field:</b> Allows you to select which team members display in the workspace

ELEMENT	DESCRIPTION
<b>Exceptions</b>	Displays the most frequent types of exceptions that require quick action. <b>Unexcused Absence</b> - The team member was scheduled to work, and no punches exist for the day. The absence has not been excused. <b>Missed Punch</b> - The team member's timecard does not contain the required amount of punches to total the hours. <b>Early/Late In/Out</b> - Displays a checkmark in the column indicating a deviation from the scheduled time.

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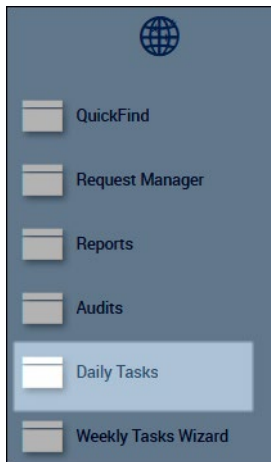
## LEARNING SCENARIO

Use the Reconcile Timecard Genie to see exceptions at a high level.

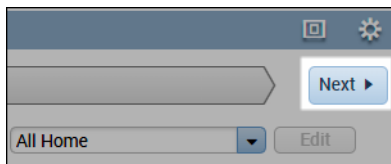
---

### REVIEW EXCEPTIONS USING A WIDGET

- 1 Select **Daily Tasks** from the Related Items Pane.



- 2 Click **Next** to navigate to the Reconcile Timecard genie.



**REVIEW EXCEPTIONS USING A WIDGET**

**3** Review team member information for exceptions.

Name	ID	Assigned Manager	Absence	Missed Punch	Unscheduled Hours	Late In	Early Out	Total Regular plus Paid LV	Totals Up To Date
Caldwell, Carolyn J	9014X003	Manager 14, Manager 14	✓		✓			64.0	✓
Johnson, Gail S	9014X005	Manager 14, Manager 14		✓	✓	✓		60.25	✓
Jones, Sharon R	9014X006	Manager 14, Manager 14			✓			36.0	✓
Smith, Bobby W	9014X001	Manager 14, Manager 14	✓	✓	✓	✓	✓	55.5	✓
Taylor, Michael P	9014X012	Manager 14, Manager 14	✓					40.0	✓
Watkins, Bonnie S	9014X002	Manager 14, Manager 14	✓	✓				36.0	✓



# MODULE 8: TIMECARDS

---

**MODULE OBJECTIVES:**

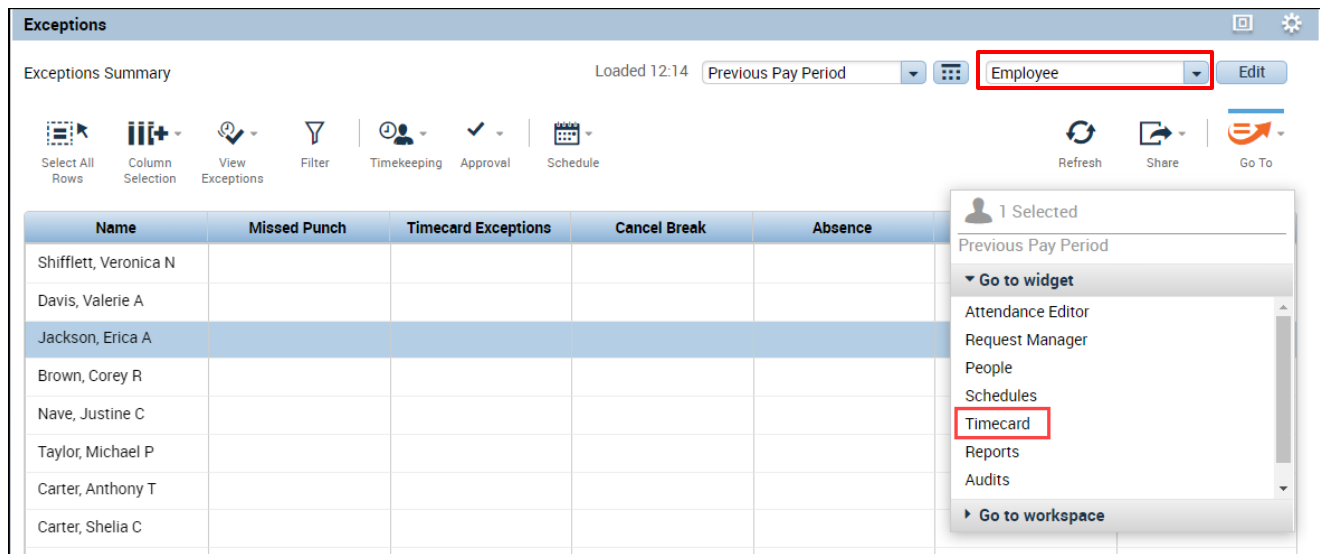
- Access timecards.
- Navigate the timecard workspace.
- Cancel and Add Meal Breaks

## ACCESSING MULTIPLE TIMECARDS USING GOTO

From a Workforce genie, you can quickly access multiple employees' timecards. Only one timecard displays at a time, but it is easy to navigate from one employee's timecard to another using the navigation arrows in the timecard header. There are different methods available to select employees within a genie:

1. Hold the Ctrl key and click employee names.
2. Click an employee's name, hold the Shift key, and click the last employee's name in the range.
3. Click Select All from the toolbar.

Once you select the employee from the genie list, you can use the Go To control and select Timecards.



### POLICY

- Select the appropriate Hyperfind to locate all managed employees.
- Click Select All from toolbar before using the Go To control to view all managed employee timecards.

## TIMECARD LAYOUT

The timecard is divided into three main sections: 1) header, 2) timecard grid, and 3) timecard tabs. Each section is described in detail below.

### HEADER

The timecard header is located at the top of the screen just below the banner.



ELEMENT	DESCRIPTION
<b>NAME</b>	Displays the name for the employee's timecard being viewed.
<b>ARROW BUTTONS</b>	Allows you to easily scroll between employee timecards.
<b>TIME PERIOD</b>	Determines what timeframe is being viewed.
<b>ACTION BUTTONS</b>	<p>Action buttons allow you to perform edits or tasks within the timecard:</p> <ul style="list-style-type: none"> <li>• <b>View</b> – allows you to change the view of the timecard.</li> <li>• <b>Approve Timecard</b> - approves the employee's timecard for the selected time period.</li> <li>• <b>Print Timecard</b> - prints the employee's timecard.</li> <li>• <b>Refresh</b> - updates the timecard with the most recent database information.</li> <li>• <b>Calculate Totals</b> - calculates any totals based on changes made to the timecard. It does not save the changes.</li> <li>• <b>Save</b> - saves the changes to the database.</li> <li>• <b>GoTo</b> – jump to other areas of the software.</li> </ul>

## TIMECARD GRID

The timecard grid is located in the middle of the screen and is where the majority of time edits take place. The timecard grid is comprised of the following columns:

	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period	Schedule
	Sun 9/09												
	Mon 9/10			7:00		13:00				6.0	6.0	6.0	7:00-15:...
	Tue 9/11												7:00-15:...
	Wed 9/12					13:00						6.0	
	Thu 9/13	BRV-Ber...	8.0	9:00							8.0	14.0	
	Fri 9/14												8:00-1...
		On Call	9.5	8:00								14.0	
	Sat 9/15											14.0	

COLUMN	DESCRIPTION
<b>INSERT AND DELETE ROW BUTTONS</b>	Allows you to insert or delete a row for each date displayed in the timeframe selected.
<b>DATE</b>	Lists the dates contained within the selected time period.
<b>PAY CODE</b>	Allows you to add a pay code to a team member timecard for the date.
<b>AMOUNT</b>	Allows you allocate an amount of hours to the selected pay code.
<b>IN PUNCH</b>	Displays the time the team member punched in for a shift or returned from a meal break.
<b>TRANSFER</b>	Allows you to allocate worked time to an alternate labor account or work rule.
<b>OUT PUNCH</b>	Displays the time the team member punched out for the day or started a meal break.
<b>TOTALS</b>	Displays totals for each day of the time period selected. <ul style="list-style-type: none"> <li>• <b>Shift</b> – Total hours of all shifts worked on the selected day, excluding pay codes.</li> <li>• <b>Daily</b> – Total hours for the selected day, including pay codes.</li> <li>• <b>Period</b> – Total hours up to and including the selected day.</li> </ul>
<b>SCHEDULE</b>	Displays the team member’s scheduled shifts for each date.

### ADDITIONAL INFORMATION

- You can click the drop-down arrow next to the team member’s name to select a different team member’s timecard.

## TIMECARD TABS

The timecard tabs are located at the bottom of the screen under the timecard grid. Two main tabs always appear: Totals and Accruals. However, based on your role, you may see additional tabs. The timecard tabs include the following information:

Totals Accruals		
All	Account	
Account	Pay Code	Amount
-!-!-!-!-!	Total Regular plus Paid LV	8.5
MCP/090/092/2409000/0001/96634/0	Total Regular plus Paid LV	8.0
-!-!-!-!-!	REG-Regular	8.5
MCP/090/092/2409000/0001/96634/0	ONC-On Call P	9.5
MCP/090/092/2409000/0001/96634/0	BRV-Bereavement	8.0

Tab Name	Description
<b>Totals</b>	Displays the team member’s pay code totals for the time period.
<b>Accruals</b>	Displays the team member’s accrual balances by accrual code.

## CANCELING AN AUTOMATIC MEAL DEDUCTION

Some team members are assigned an automatic meal deduction. In these cases, the team member does not have to punch in and out to indicate when the meal was taken. Instead, Kronos automatically deducts the amount of time from the team member’s daily total for his or her assigned meal break allowance. The amount of the deduction is determined by the team member’s assigned pay rule. In some instances, you may need to cancel the automatic deduction.

To cancel a meal deduction, right-click on the punch in question to access the punch actions menu. Use the Edit action to cancel the meal deduction. Choose ALL for the Cancel Deduction field.

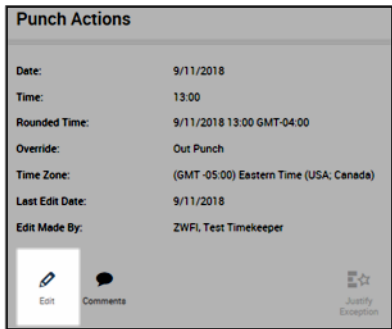
### LEARNING SCENARIO

A team member notified you that he did not receive a meal break yesterday because the site was short-handed. Attach a comment to the team member’s out punch and cancel the meal deduction.

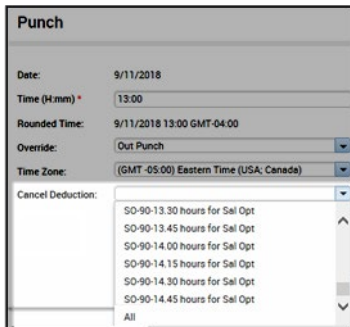
#### CANCEL A LUNCH DEDUCTION

- 1 Access the team member timecard. Right-click the out punch on the day the meal break is to be canceled. Click **Edit**.

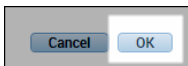
## CANCEL A LUNCH DEDUCTION



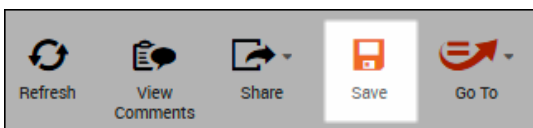
- 2 In the **Cancel Deduction** field, select the appropriate lunch deduction. Choose All to cancel all meal deductions regardless of the pay rule.



- 7 Click **OK**.



- 8 Click **Save**.



### ADDITIONAL INFORMATION

If you do not know the name of the lunch deduction, select All from the list.

# MODULE 9: RESPONDING TO TEAM MEMBER REQUESTS

---

**MODULE OBJECTIVES:**

- Describe the purpose of team member requests.
- Review team member requests using alerts.
- Review team member requests using the Request Manager widget.
- Approve team member requests for time off.

## TEAM MEMBER REQUESTS OVERVIEW

Kronos automates the time-off request process. Team members submit requests electronically for your review and approval. A Manager can either approve or deny a submitted request. When the request is approved, it automatically overrides the team member's schedule in the Schedules widget. In the Current Pay Period of the request, the pay code is applied in the timecard to pay the team member and deduct their accrual balance. When the request is denied, the team member receives a notification.

## REVIEWING TEAM MEMBER REQUESTS USING ALERTS

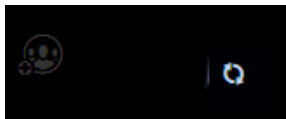
The Requests alert displays any time-off or other type of requests from team members which require your review and action.

### LEARNING SCENARIO

After logging into the system you notice there are several time off request alerts from team members. You would like to review each request to determine what action to take on the request.

#### OPEN A TIME OFF REQUEST

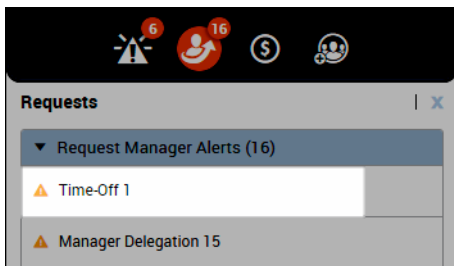
- 1 Click the **Refresh** button to get up-to-date data.



- 2 Click the **Requests** alert icon.



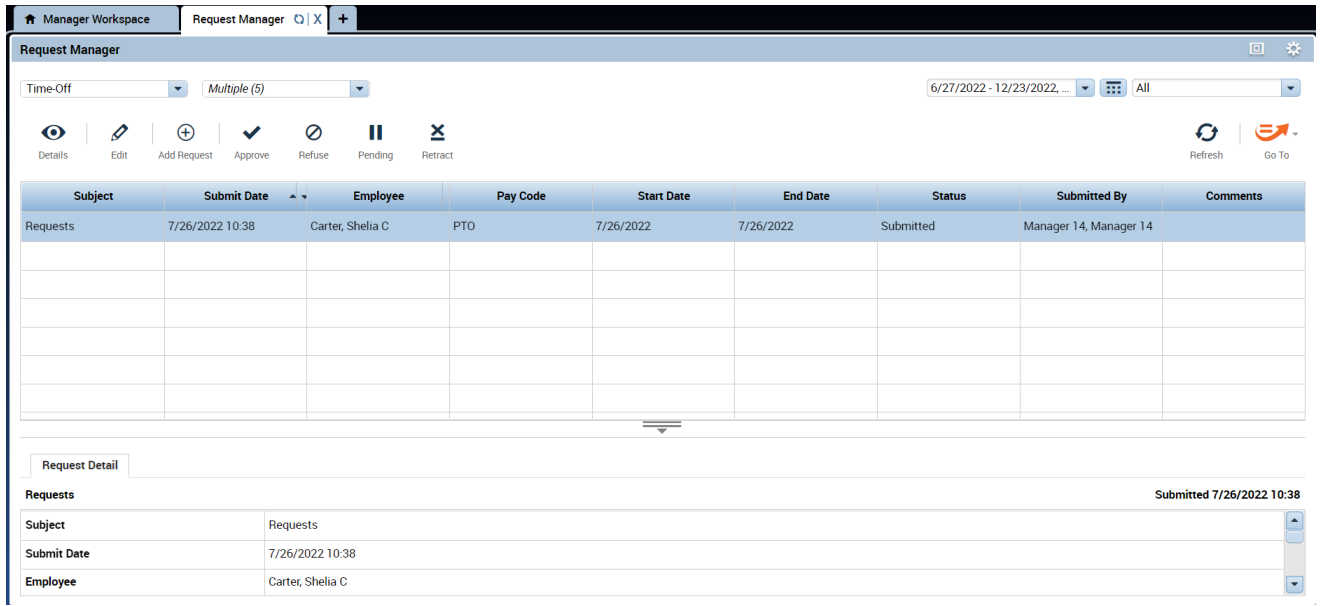
- 3 Select a team member from the drop-down list.





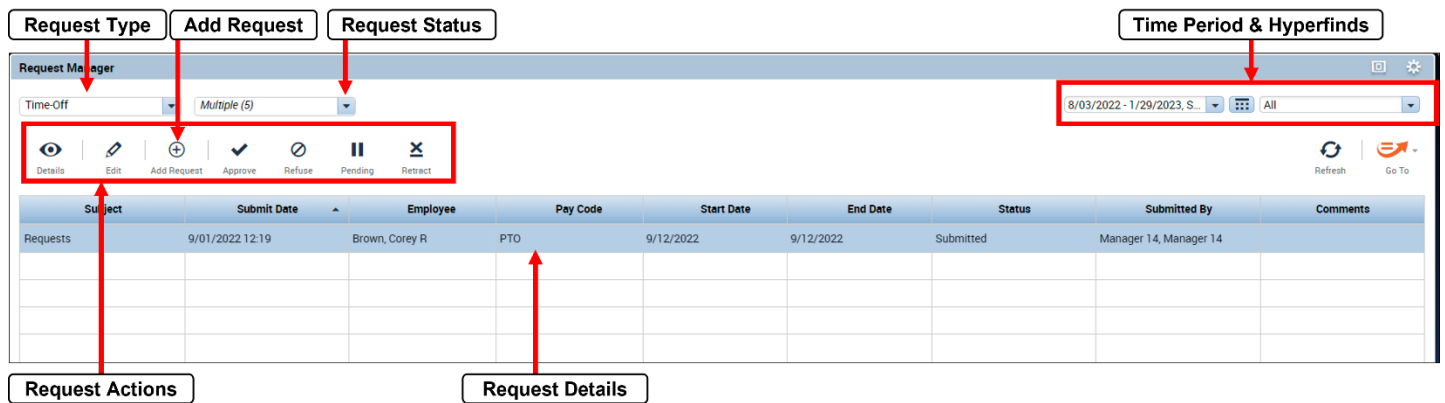
**OPEN A TIME OFF REQUEST**

4 The **Request Manager** widget is automatically activated and displays the team member request details.



**THE REQUEST MANAGER WIDGET**

The Request Manager widget displays a list of team members who have requested time-off. The widget contains detailed information to allow you to review the contents of the request. The widget also allows you to view more detailed information before approving or rejecting the request.



ELEMENT	DESCRIPTION
<b>Request Type</b>	Allows you to filter the requests that display by their type.
<b>Add Request</b>	Allows a manager to request on behalf of a team member.

ELEMENT	DESCRIPTION
<b>Request Status</b>	Allows you to filter the requests that display by their status.
<b>Time Period &amp; Hyperfinds</b>	Determines the time period and team members for the requests you want to view.
<b>Request Actions</b>	Enables you to perform actions related to requests.
<b>Request Details</b>	<p>Displays the details of each team member request. Each request includes:</p> <ul style="list-style-type: none"> <li>• <b>Modified By</b> – The last user to submit or modify the request.</li> <li>• <b>Subject</b> – Displays the type of request.</li> <li>• <b>Submit Date</b> – Displays the date the request was submitted.</li> <li>• <b>Status</b> - Displays the status of the request.</li> <li>• <b>Submitted By</b> - The team member who submitted the request.</li> <li>• <b>Start Date</b> – The date the team member is requesting to be off.</li> <li>• <b>Employee</b> – The team member’s name.</li> <li>• <b>End Date</b> – The last date the team member is requesting to be off.</li> <li>• <b>Pay Code</b> – The type of hours being requested.</li> <li>• <b>Comments</b> – Displays any comments associated with the request.</li> </ul>

## RESPONDING TO A TIME OFF REQUEST

### LEARNING SCENARIO

You have reviewed a team member’s request for time off and want to approve the request.

#### APPROVE A TIME-OFF REQUESTS

- 1 From the **Request Manager** widget, double click the row containing the time-off request you want to approve.

Subject	Submit Date	Employee	Pay Code	Start Date
Requests	9/01/2022 12:19	Brown, Corey R	PTO	9/12/2022

---

**APPROVE A TIME-OFF REQUESTS**

2 Review the details of the request.

Submitted: 9/01/2022 - 12:19:12  
Modified by: time14

Employee: Brown, Corey R      Type: Requests

Start date	End date	Pay code	Time Unit	Start time	Daily Amount
9/12/2022	9/12/2022	PTO	Hours	8:00	8.0

Accruals on: 9/12/2022

Accrual	Balance
PTO	24.0 Hour

---

3 Click **Approve**.

---

**ADDITIONAL INFORMATION**

- If you want to attach a comment, it must be attached to the request prior to approving or rejecting the request.
- All request types are not available for all facilities.

# MODULE 10: USING REPORTS

---

**MODULE OBJECTIVES:**

- Understand the purpose of reports.
- Access and navigate the reports workspace.
- Generate a report for one team member.
- Generate a report for multiple team members.

## REPORTS OVERVIEW

You can generate Kronos Timekeeping reports if/when you need a printed copy of time or attendance information. When you need to run a report for one team member, or a few team members, you can select the team members from within a genie and click the Reports link under Go To. If you need to generate reports for all team members who report to you, you can generate the report from the Reports widget. Below are some recommended reports:

- Time Detail
- Hours by Labor Account

## GENERATE A REPORT FOR ONE TEAM MEMBER

### LEARNING SCENARIO

You want to discuss detailed time and attendance information with a team member. Run the Time Detail report for one team member.

### GENERATE A REPORT FOR ONE TEAM MEMBER

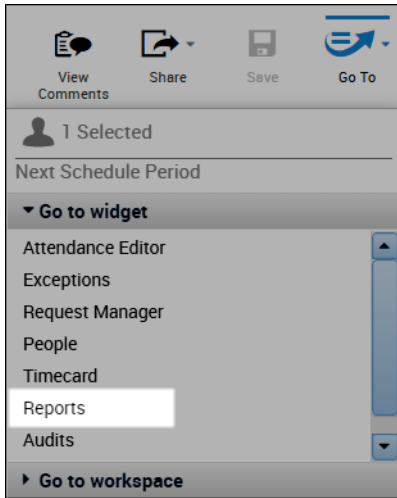
- 1 From a widget or genie, click the name of the team member(s) for whom you want to include on the report.



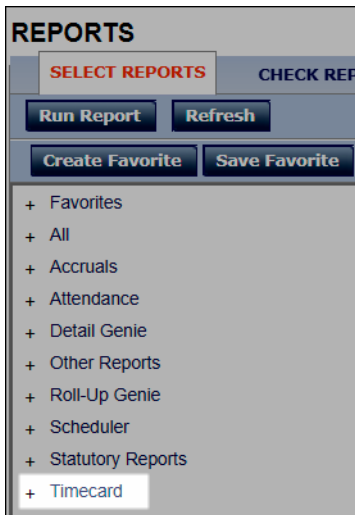
By Employee	
Name	
Brown, Corey R	
Caldwell, Carolyn J	
Carter, Anthony T	

**GENERATE A REPORT FOR ONE TEAM MEMBER**

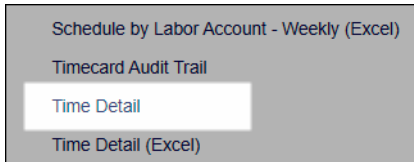
2 Click Go To and select Reports.



3 Click the + sign preceding the appropriate report category.



4 Select the report you want to generate.



**GENERATE A REPORT FOR ONE TEAM MEMBER**

- 5 Confirm the People field displays 'Previously Selected Employee(s)'. Define any additional report options from the drop-down arrows in their respective fields.

**TIME DETAIL**

**Description** Displays detailed data about each employee's punches, duration, and pay code edits. Summary data is displayed per employee, totaling time and money by labor level and pay code (excluding combined pay codes) and then by pay code only (separately listing combined pay codes).

**People**

**Time Period**

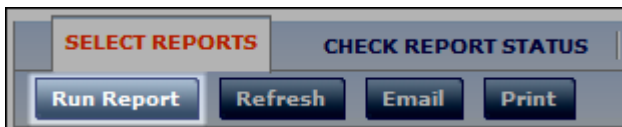
**Actual/Adjusted**

**Page Break between Employees**

**Sort by**

**Output Format**

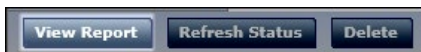
- 6 Click Run Report. The Kronos Timekeeping application automatically displays the Check Run Status tab.



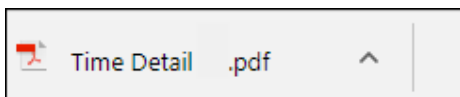
- 7 Review information in the Status column. Click Refresh Status until Complete appears in the Status column.

View Report Refresh Status Delete						
Name Search						
Report Name	Format	Date In	Date Done	Status	Output	
Time Detail	pdf	9/01/2022 13:30	9/01/2022 13:30	Complete	Screen	

- 8 To view the report, click View Report.



- 9 Click the Time Detail pdf, to view the report.



**GENERATE A REPORT FOR ONE TEAM MEMBER**

**10** The Time Detail report opens in a new tab.

Time Detail (2).pdf | 1 / 2 | 100% | [Print] [Share]

**Time Detail**

Time Period: Previous Pay Period  
 Query: Ad Hoc  
 Actual/Adjusted: Show hours worked in this period only.

Data Up to Date: 8/10/2022 2:44:15 PM  
 Executed on: 8/10/2022 14:44 GMT-04:00  
 Printed for: time14  
 Insert Page Break After Each Employee: No

**Employee:** Smith, Bobby W      **ID:** 9014X001      **Time Zone:** Eastern  
**Status:** Active      **Status Date:** 10/3/2021      **Pay Rule:** 08-NE30-C-No Shift P\_1  
**Primary Account:** MC01-I-2409000/9014/101886/P110147      **Start:** 10/3/2021      **End:** Forever

Date/Time	Apply To	In Punch	In Exc	Out Punch	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
7/24/2022	<i>Xfr/Move: Account</i>	7:06:00 AM		7:35:00 PM						12.00	12.00
7/27/2022		6:55:00 AM	LV	7:35:00 PM						12.00	24.00
7/28/2022		7:06:00 AM		3:00:00 PM						7.50	31.50
7/30/2022		6:55:00 AM	LV		EV					0.00	31.50
7/31/2022		6:55:00 AM	US	7:35:00 PM	MO					12.00	43.50
8/3/2022		6:55:00 AM		7:35:00 PM						12.00	55.50
<b>Labor Account Summary</b>						<b>Pay Code</b>	<b>Hours</b>	<b>Money</b>	<b>Days</b>		
MC01-I-2409000/9014/101886/P110147						ATKhoursWorked	55.50				
						LV-All Worked	55.50				
						REG-Regular	55.50				
						Total Hours Worked	55.50				
						Total Regular	55.50				
<b>Combined Pay Code Summary</b>						<b>Pay Code</b>	<b>Hours</b>	<b>Money</b>	<b>Days</b>		
						ATKhoursWorked	55.50				
						LV-All Worked	55.50				
						Total Hours Worked	55.50				
						Total Regular	55.50				
<b>Totals:</b>							222.00	\$0.00	0.00		
<b>Pay Code Summary</b>						<b>Pay Code</b>	<b>Hours</b>	<b>Money</b>	<b>Days</b>		
						REG-Regular	55.50				
<b>Totals:</b>							55.50	\$0.00	0.00		



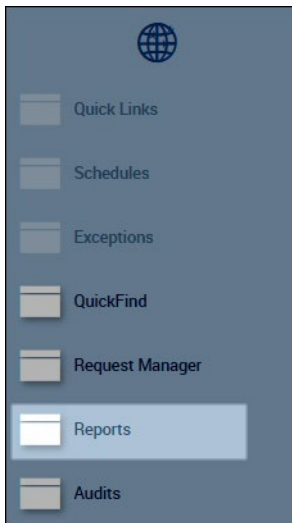
## GENERATE A REPORT FOR ALL TEAM MEMBERS

### LEARNING SCENARIO

You just completed the schedule for next week. You want to print a schedule report so you can post the new schedule in the break room for team members to view. Generate the Schedule by Labor Hours - Weekly report.

### GENERATE A REPORT FOR ALL TEAM MEMBERS

- 1 Select the Reports widget from the Related Items Pane.



- 2 Click the + sign preceding the appropriate report category.



---

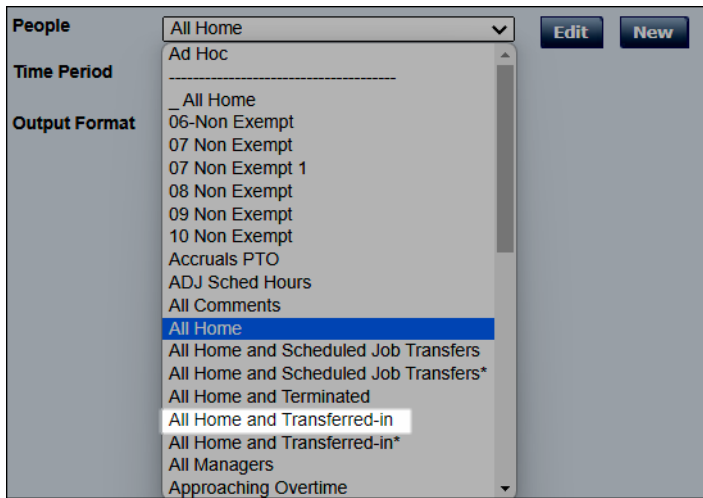
**GENERATE A REPORT FOR ALL TEAM MEMBERS**

---

3 Select the report you want to generate.



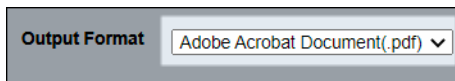
4 Click the drop-down arrow in the People field and select a team member group.



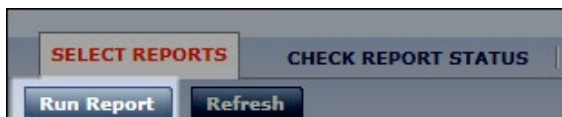
5 Click the Time Period field or the Calendar icon to select the date range of the report.



6 Select the Output Format.



7 Click Run Report. The application automatically displays the Check Run Status tab.



**GENERATE A REPORT FOR ALL TEAM MEMBERS**

- Review information in the Status column. Click Refresh Status until Complete displays in the Status column.

<span>View Report</span> <span>Refresh Status</span> <span>Delete</span>				
Name <input type="text"/> <span>Search</span>				
Report Name	Format	Date In	Date Done	Status
Schedule by Labor Account - Weekly	pdf	9/01/2022 14:00	9/01/2022 14:00	Complete
Time Detail	pdf	9/01/2022 13:30	9/01/2022 13:30	Complete

- To view the report, click View Report. The report opens in a new browser window as in the previous exercise.



**ADDITIONAL INFORMATION**

- Select the All Home and Transferred-in option in the People field to include team members who transferred and are scheduled to work at your location on your report.
- Other report output options are available from the Menu including email or print options.

**CREATING A FAVORITE REPORT**

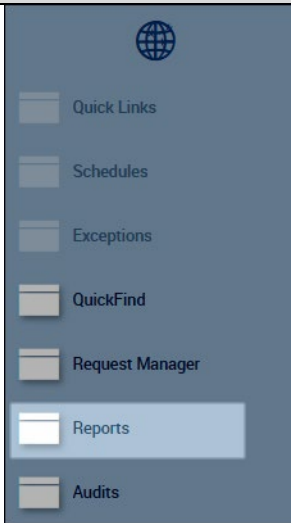
**LEARNING SCENARIO**

You run the Generate the Schedule by Labor Hours - Weekly report often. Create a Favorite report to quickly access the report.

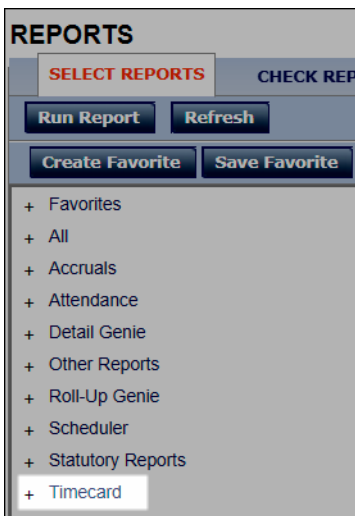
**CREATE A FAVORITE REPORT**

- Select the Reports widget from the Related Items Pane.

**CREATE A FAVORITE REPORT**



2 Click the + sign preceding the appropriate report category.



3 Select the report to favorite.



4 Click **Create Favorite**.

**CREATE A FAVORITE REPORT**

Create Favorite

Save Favorite

Duplicate Favorite

Delete Favorite

5 Enter the label for the report in the **Favorite Report** field.

**FAVORITE REPORT**

\*Favorite Report

6 Click the drop-down arrow in the **People** field and select a Hyperfind from the list.

**FAVORITE REPORT**

\*Favorite Report

Author's Remarks

This Favorite Report

Report

People

- All Home and Scheduled Job Transfers\*
- All Home and Terminated
- All Home and Transferred-in
- Approaching Overtime
- Attendance Notifications
- Call Back Hours
- Employee
- Exceptions
- ExemptPTOlessthan8
- Expired Licenses
- Inactive Employees Only
- Interface Notification
- Missed Punch
- PTO Unexcused

7 Click the drop-down arrow in the **Time Period** field and select a period from the list.

**FAVORITE REPORT**

\*Favorite Report

Author's Remarks

This Favorite Report

Report

Description

People

Time Period

- Previous Pay Period
- Current Pay Period
- Next Pay Period
- Previous Schedule Period
- Current Schedule Period
- Next Schedule Period
- After Next Schedule Period
- Today
- Yesterday
- Week to Date
- Last Week
- Specific Date
- Range of Dates
- Relative Specific Date
- Range of Relative Dates

8 Click the drop-down arrow in the **Output Format** field and select the desired output for the report.

Output Format

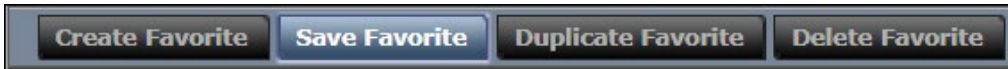
Adobe Acrobat Document(.pdf)

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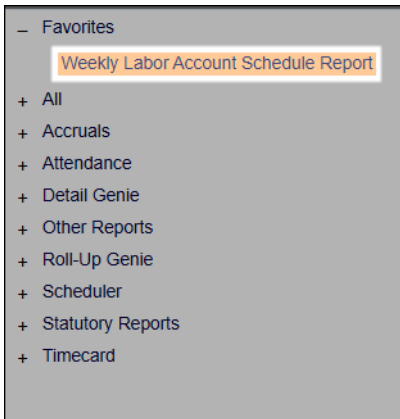
**CREATE A FAVORITE REPORT**

---

9 Click **Save Report**.



10 Click the + sign preceding the **Favorites** category to view favorited reports.



---

**ADDITIONAL INFORMATION**

Some reports only have one output format available.

# MODULE 11: MANAGER DELEGATION

---

**MODULE OBJECTIVES:**

- Request another Manager for backup coverage.
- Accept or decline another Manager's backup request.
- Switch between access to your team members and your delegated ones.
- Cancel a backup request.

## MANAGER DELEGATION OVERVIEW

When you have plans that are going to take you out of the office temporarily, Kronos allows you to send a request to another Manager asking them to assume your timekeeping role while you are away. Kronos refers to this feature as Manager Delegation.

### POLICY

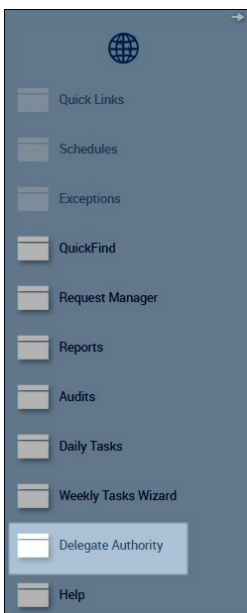
- Manager Delegation is only used for short term coverage.
- You can delegate to more than one Manager if you need to divide up a large number of team members. However, you must communicate to each Manager for which team members they are responsible.

### LEARNING SCENARIO

You are going on vacation next week. You will not be available to review and approve team members' time. You delegate your authority to another Manager so your team members' time can continue to be reviewed and approved during your absence.

### INITIATE A MANAGER DELEGATION REQUEST

- 1 Click **Delegate Authority** in the Related Items pane.

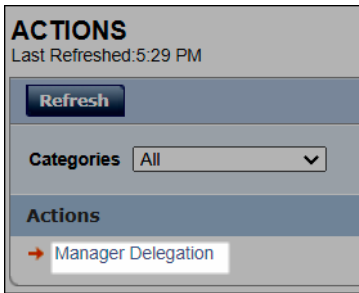




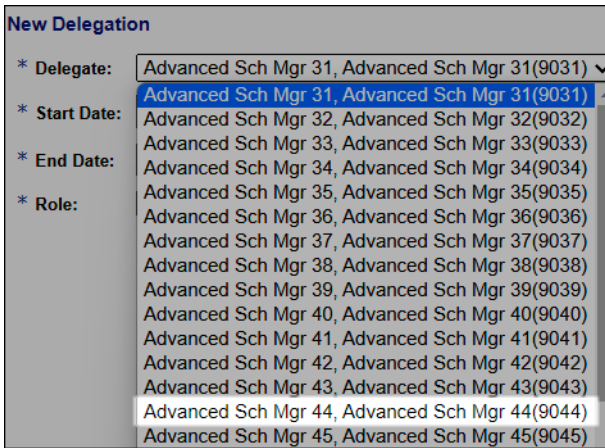
---

**INITIATE A MANAGER DELEGATION REQUEST**

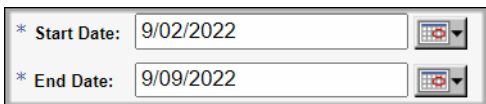
2 Click the **Manager Delegation** link.



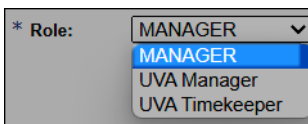
3 Click the **Delegates** drop-down list, and select the Manager to whom you want to delegate your tasks.



4 Select the **Start Date** and **End Date** to indicate when you want to delegate your tasks.

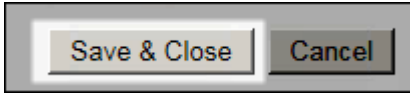


5 Click the drop down to select the Delegate's role.



**INITIATE A MANAGER DELEGATION REQUEST**

6 Click **Save & Close**. The selected manager receives a notification of the request within the Request Manager.



**CANCELING A BACKUP REQUEST**

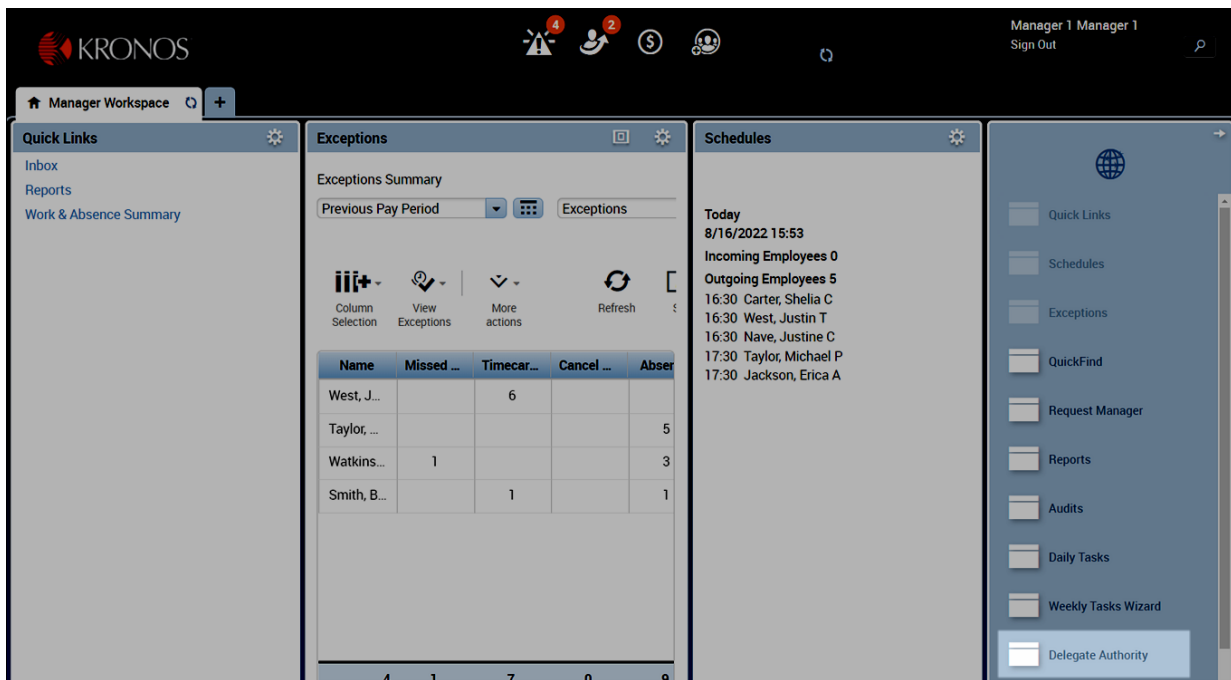
The Manager Delegation feature allows you to establish the start and end date for backup coverage. These dates determine when the backup Manager has access to your team members' information. Once the end date becomes current, the other Manager can no longer access your team members' time information. If plans change and you need to cancel the backup coverage earlier than anticipated, you can manually remove the delegation.

**LEARNING SCENARIO**

You delegated your tasks to another Manager through next Friday. However, you ended your vacation a day early and need to cancel the delegation.

**CANCEL A DELEGATION REQUEST**

1 Click **Delegate Authority** in the Related Items pane.



---

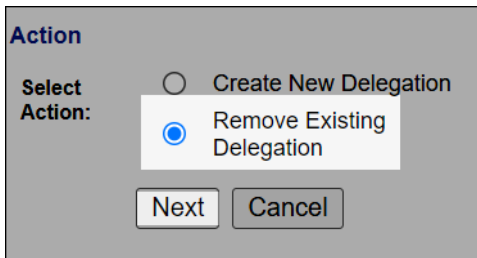
**CANCEL A DELEGATION REQUEST**

---

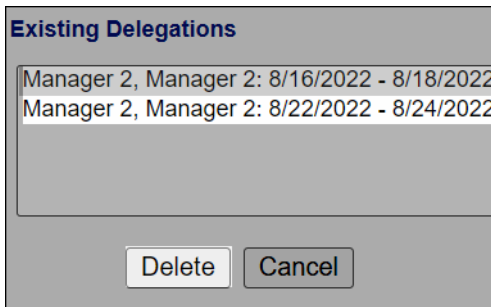
2 Click the **Manager Delegation** link.



3 Select **Remove Existing Delegation** and click **Next**.



5 Select the existing delegation request and click **Delete**.



## MANAGING DELEGATION REQUESTS

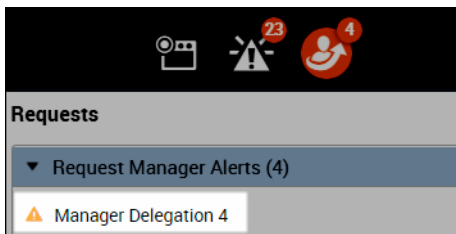
If you receive a delegation request, an alert appears to notify you of the new request and the request details appear in the Requests widget. When the request is selected, the requesting Manager's name, team member group, and time period can be reviewed before you act on the request.

### LEARNING SCENARIO

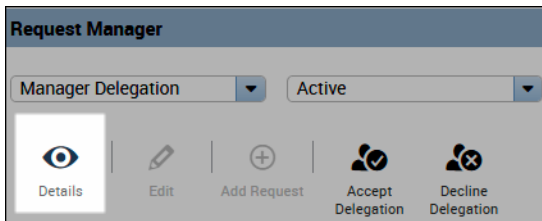
Another Manager needs you to cover for him while he is at a company event. He has sent you the request. You need to accept the request to gain access to his group of team members.

#### ACCEPT A DELEGATION REQUEST

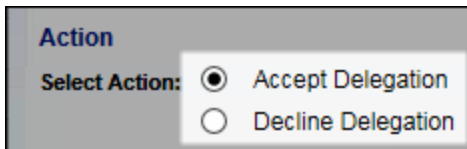
- 1 Click the **Request Manager** alert and select **Manager Delegation**.



- 2 With the request selected, click **Detail** and review the request details.



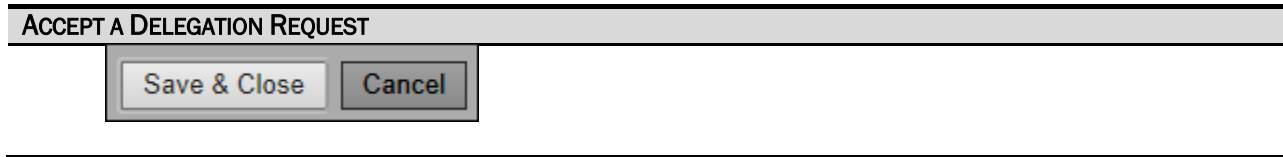
- 3 In the **Action** section, accept or decline the delegation request.



- 4 Optionally, enter a message to the requesting Manager in the **Comment** box.



- 5 Click **Save & Close**.



## ACCESSING DELEGATED TEAM MEMBERS

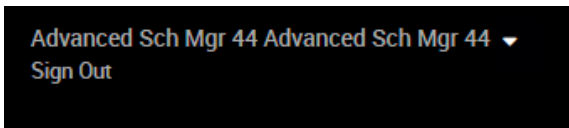
Kronos automatically grants you editing access to the delegated team member group when you accept the request. A Switch Role icon appears in the Banner during the accepted time period when you log on using your current credentials. All edits made are tracked in the audit trail under the user name of the person who made the edits.

### LEARNING SCENARIO

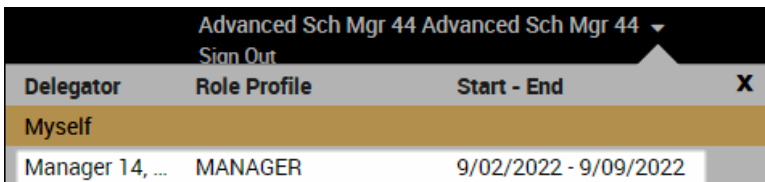
You have completed the timekeeping and scheduling tasks for the day for your team members. Now, you need to do the same for your delegated team members. Switch from accessing your team members to your delegated team members.

#### SWITCH TO A DELEGATED ROLE

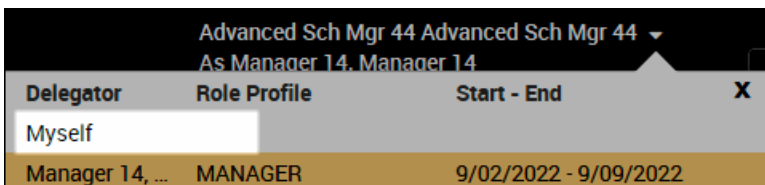
- 1 A Down Arrow icon displays next to your name. Click the **Down Arrow**.



- 2 Click to select the Manager whose tasks you are performing as his or her delegate.



- 3 Click the **Down Arrow** icon and select **Myself** to return to your team members' information.



# MODULE 12: ATTENDANCE OVERVIEW

---

**MODULE OBJECTIVES:**

- List the advantages of Kronos Attendance.
- Overview of the attendance process.
- Overview of attendance polices.
- Recognize tasks within the Kronos Attendance application.
- Edits that impact attendance tracking.

## ADVANTAGES OF USING WORKFORCE ATTENDANCE

Workforce Attendance collects and tracks team member attendance data. The application interprets configured rules that enforce attendance policies and alerts.

Listed below are the advantages Kronos Attendance:

- Automates and simplifies your attendance tasks.
- Allows for policy standardization to ensure fair and consistent attendance practices.
- Provides the opportunity to address Kronos Attendance issues early; before they become larger problems.
- Provides tools to monitor and reduce team member absences more effectively.

## OVERVIEW OF THE ATTENDANCE PROCESS

Team member attendance is an important aspect to the overall workforce management process. Kronos Attendance automates the tracking and enforcement of company attendance policy rules. The application compares team member schedules to actual worked time and identifies discrepancies (i.e. timecard exceptions). These exceptions may be associated with attendance events according to your attendance policies.

## THE ATTENDANCE PROCESS

The image below illustrates the attendance process and describes the applicable tasks within each step.



## EXCEPTIONS AND ABSENCES

Exceptions and unexcused absences are driven by comparing actual punch times to scheduled punch times and tracking the deviations. The Workforce Timekeeper application tracks these instances in the team member's timecard. The following exceptions and absences may generate an attendance infraction:

1. Late In
2. Incomplete Shift (Early Out)
3. Unexcused Absence



## OCCURRENCES

When an attendance infraction occurs, Workforce Attendance calculates the event and, depending on the policy, leads to an Occurrence.

## OCCURRENCE-BASED DISCIPLINE LEVEL ACTIONS

As infractions are accumulated, team members reach different discipline levels in the Workforce Attendance application based on the attendance policy being enforced. Occurrences in a consecutive rolling 12-month period result in progressive corrective action per the following schedule:

## EDITS THAT IMPACT OCCURRENCES

During the normal course of a day, Workforce Timekeeper compares team member schedules to their actual punch times and generates exceptions and absences in the team member's timecard. In some cases, the exception and/or absence may need to be modified to correctly capture and calculate attendance infractions. Adjustments to current pay period attendance infractions can be addressed in the timecard or schedule. There are two types of edits that impact attendance tracking: schedules and timecard comments.

## SCHEDULES

If a team member is asked to work a different start or end time as compared to the schedule, no occurrence should apply; however, an exception occurs when Workforce Timekeeper compares the team member's schedule to his or her actual punch times. In these situations, the scheduled shift should be modified to correct the occurrence.

## TIMECARD COMMENTS

Timecard comments allow you to document details about worked hours to assist in attendance tracking. The presence or absence of a comment can impact the interpretation of exceptions and punch edits during the processing of attendance.

# MODULE 13: REVIEWING ATTENDANCE INFORMATION

---

**MODULE OBJECTIVES:**

- Access and navigate the Attendance genie and Attendance Editor.
- Locate attendance information in the Attendance genie.
- Describe the purpose of the Attendance Processor.
- Review current attendance information using the Attendance Editor.
- Generate attendance reports.

## ACCESSING THE ATTENDANCE GENIE

Once an attendance event is applied to a team member’s attendance record, you can view details about the event and triggered action from the Attendance genie.

## THE ATTENDANCE GENIE WORKSPACE

The Attendance genie provides a summary view of team member attendance data and allows you to sort that data. From the Attendance genie you can review team member attendance events, actions, balances, make team member selections and quickly access the attendance records that need your immediate attention.

Name	ID	Processed Through Date	Occurrence Poin...	Attendance Action	Action Trigger Date	Action Initiated Date	Action Status	Action Completed Date
Caldwell, Caroly...	9014...	2/01/2022						
West, Justin T	9014...	7/11/2022	0.0					

COLUMN	DESCRIPTION
<b>Name</b>	Lists the team member names in alphabetical order. The team members listed are determined by the Show field selection.
<b>ID</b>	Lists the team member’s Workforce ID number.
<b>Process Through Date</b>	Displays the date the attendance processor last ran.
<b>Occurrences</b>	Displays the team member occurrence balance.
<b>Attendance Action</b>	Displays the event that has triggered a required response.
<b>Action Trigger Date</b>	Displays the date of the triggered event.
<b>Action Initiated Date</b>	Displays the start date of the triggered action.
<b>Action Status</b>	Provides the status of the triggered action.
<b>Action Completed Date</b>	Displays the date the action was finalized.

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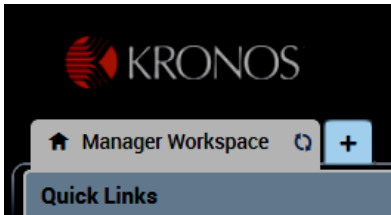
## LEARNING SCENARIO

You want to identify team members with attendance events and actions. Activate the Attendance Genie.

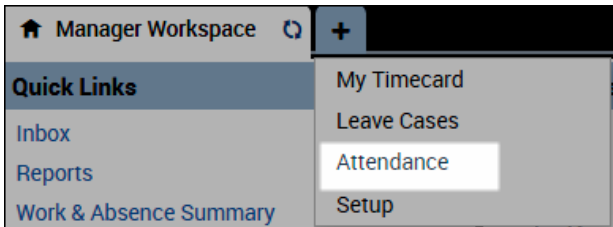
---

### ACCESS THE WORKFORCE ATTENDANCE GENIE

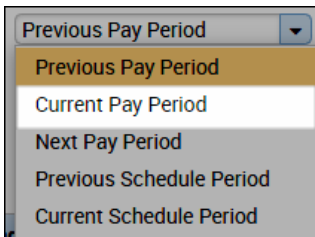
- 1 Click **Add Workspace**.



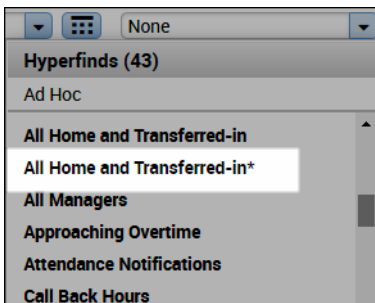
- 
- 2 Select **Attendance**.



- 
- 3 Select the desired **Time Period**.



- 
- 4 Select the desired group of team members using the Hyperfind dropdown menu.



**ACCESS THE WORKFORCE ATTENDANCE GENIE**

**5** Review team member attendance information.

Name	ID	Processed Through Date	Occurrence Poin...	Attendance Action	Action Trigger Date	Action Initiated Date	Action Status	Action Completed Date
Caldwell, Caroly...	9014...	2/01/2022						
West, Justin T	9014...	7/11/2022	0.0					

## ACCESSING THE ATTENDANCE EDITOR

Once you use the Attendance genie to identify attendance items that need your attention, you can access the Attendance Editor to review the details of those occurrences and determine if any action should be taken.

## THE ATTENDANCE EDITOR WORKSPACE

The Attendance Editor is divided into different tabs. Each tab provides different information regarding attendance. The tabs and their contents are described in detail below:

### Summary Tab

Displays summary tables of the team member’s attendance balances, attendance action information, and discipline level assignments (occurrence balance) for the selected timeframe.

SUMMARY				CALENDAR	INCIDENTS	ACTION DETAILS	DOCUMENTS	AUDITS
Refresh		Apply Rules						
Last Process Start		6/26/2022		Processed Through		7/11/2022		
Time Period		Current Pay Period		8/21/2022 – 9/03/2022		Apply		
<b>BALANCES</b>								
	Balance Type	Starting Balance	Change	Ending Balance				
	Tardies	6.00	0.00	6.00				
	NCNS	0.00	0.00	0.00				
	Occurrences	0.00	0.00	0.00				
<b>PERFECT ATTENDANCE</b>								
	Date	Perfect Attendance	Perfect Attendance Definition	Source Policy				
NO PERFECT ATTENDANCE INFORMATION FOUND.								
<b>ACTION</b>								
	Action	Action Date	Source Policy					
NO ACTIONS FOUND.								

**Calendar Tab**

Displays attendance information for the team member in a calendar format to help identify critical information. Colored visual Indicators on the calendar aid you with locating attendance trends. Click a date in the calendar and select Day Detail to view the event in further detail. A Legend is available through the **Select an Action** dropdown menu.

The screenshot shows the Kronos Manager interface with the **CALENDAR** tab selected. The interface includes navigation tabs (SUMMARY, CALENDAR, INCIDENTS, ACTION DETAILS, DOCUMENTS, AUDITS), a **Refresh** button, a **Day Detail** button, and a **View Legend** dropdown menu. The main area displays the **Last Process Start** (6/26/2022) and **Processed Through** (7/11/2022). Below this, there are fields for **Time Period** (Range of Dates) with dates 8/14/2022 and 9/02/2022, and a **View Width** selector (Week, Month, Multiple Months) with an **Apply** button. The calendar grid shows dates for August (14, 15, 16, 21, 22, 23) and September (28, 29, 30). A **Calendar Legend** window is open, displaying a table of attendance codes and their descriptions.

Appearance	Name
Txt	Ignore History Marker,Ignore Timecard Data Marker
Txt 1.00 1.00	Holiday,Tardy 1-30m,Tardy 31 Minutes or More,Tardy 1-30m Excused,Tardy 31 Minutes or More Excused,Early Out Unapproved 1-30m,Missed Punch,Early Out Unapproved 31 min or more,Unexcused Absence Unpaid
Txt 1.00	No items selected in Data Element Setup. Data Element Name:Combined Events
Txt 1.00	No items selected in Data Element Setup. Data Element Name:Patterns
Txt 1.00	Perfect Attendance Occurrences
Txt	No items selected in Data Element Setup. Data Element Name:Discipline Actions
Txt	Tardy Perfect Attendance
Txt 1.00	Balance Adjustment,Balance Reset
Txt 1.00	Expirations
Txt 1.00 1.00	No items selected in Data Element Setup. Data Element Name:Lost Time Events

**Incidents Tab**

Allows you to view a chronological list of attendance infractions and actions. You can sort the attendance events by clicking on a column header. Clicking the Apply Rules button runs the Attendance Processor and provides the most up to date attendance balances.

SUMMARY		CALENDAR		INCIDENTS		ACTION DETAILS		DOCUMENTS		AUDITS	
Refresh		Add Event →		Edit →		Delete		Apply Rules		View	
Last Process Start		6/26/2022		Processed Through		7/11/2022					
Time Period		Range of Dates		8/14/2022		9/02/2022		Apply			
Day	Date ▲	Event/Pattern/Action		Actual Amount		Balance Change		Total			
This table currently contains no data.											

**Action Details Tab**

Displays a chronological list of all the attendance actions that have been triggered by an attendance infraction, which are based on the team member’s attendance policy assignment.

SUMMARY		CALENDAR		INCIDENTS		ACTION DETAILS		DOCUMENTS		AUDITS	
Refresh		Edit →		Apply Rules		View		Regenerate		Forward →	
Last Process Start		6/26/2022		Processed Through		7/11/2022					
Time Period		Range of Dates		8/14/2022		9/02/2022		Apply			
Attendance Action				Triggered Date		Initiated Date					
NO ACTIONS FOUND.											



**Documents Tab**

Displays a chronological list of all the attendance actions and documents that have been triggered by an attendance infraction. Also, if the document has been regenerated, it lists the date and time it was last generated.

SUMMARY	CALENDAR	INCIDENTS	ACTION DETAILS	DOCUMENTS	AUDITS
<input type="button" value="Refresh"/> <input type="button" value="Apply Rules"/> <input type="button" value="View"/> <input type="button" value="Regenerate"/> <input type="button" value="Forward"/>					
Last Process Start 6/26/2022 Processed Through 7/11/2022					
Time Period <input type="text" value="Range of Dates"/> <input type="text" value="8/14/2022"/> <input type="text" value="9/02/2022"/> <input type="button" value="Apply"/>					
Attendance Action		Triggered Date		Document	Last Generated on Date/Time
NO DOCUMENTS FOUND.					

**Audits Tab**

Lists all actions taken on the team member’s attendance record, including the user who performed the edit.

SUMMARY	CALENDAR	INCIDENTS	ACTION DETAILS	DOCUMENTS	AUDITS
<input type="button" value="Refresh"/>					
Last Process Start 6/26/2022 Processed Through 7/11/2022					
Time Period <input type="text" value="Range of Dates"/> <input type="text" value="8/14/2022"/> <input type="text" value="9/02/2022"/> <input type="button" value="Apply"/>					
Type of Edit: <input type="text" value="All"/> <input type="button" value="Apply"/>					
Date	Type	Name	Actual Amount	Event Time	Event Time Belongs To
NO AUDITS FOUND.					

**LEARNING SCENARIO**

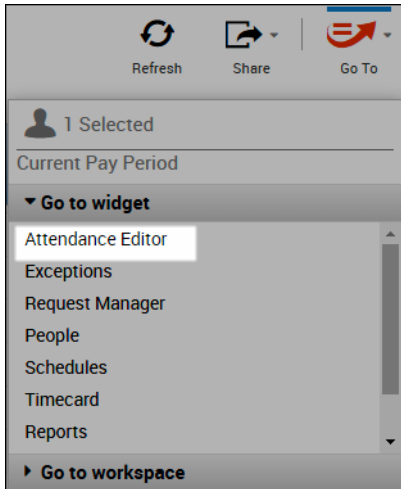
You need to review the details of a team member’s attendance infractions. Access the Attendance Editor for a team member.

**ACCESS THE ATTENDANCE EDITOR**

- 1 From the **Attendance** genie, select the team member’s name(s) you want to view in detail.

Name	ID	Rules In Progress	Processed Through Date	Processed Through Time	Tardy P...	Occurrence Poin...	NCNS Points
Taylor, Michael P	9014...		2/01/2022	0:00			
Watkins, Bonnie S	9014...		2/01/2022	0:00			
West, Justin T	9014...		7/11/2022	0:00	6.0	0.0	0.0

- 2 Click **Go To** and select Attendance Editor.



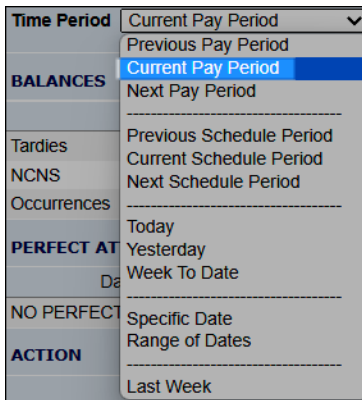
- 3 Select a **tab** to view the attendance data.



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**ACCESS THE ATTENDANCE EDITOR**

4 Click the drop-down arrow in the **Time Period** field and select a time span to view.



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5 Click Apply.

