Getting Started with Workforce Timekeeper™
A Manager's Guide for Power Users

A guide for managers that summarizes the most common manager tasks, which include using Workforce Genies, Timecards, Reports, and the People Editor.

Kronos Workforce Central Suite
Version 5

KRONOS®

Document Revision History

Document Revision	Product Version	Release Date
A	Workforce Timekeeper 5.2	May 2006

Using Workforce Timekeeper

Kronos® Workforce Timekeeper™ is the foundation of the time and labor capability of the Kronos® Workforce Central® suite of products that includes human resources, payroll, and scheduling applications. These applications can be deployed individually or as a comprehensive solution for employee relationship management.

Workforce Timekeeper labor management software enables your employees to use an industry-standard Web browser, such as Microsoft Internet Explorer or Netscape, to enter, review, edit, and approve the time that they spend in job-related activities. You can then review, edit, or approve their time as well as use the system to create schedules, track accruals, generate reports, and transfer time information to your company's payroll system.

Viewing Customized Displays

The Workforce Timekeeper display is customized according to your company's time and attendance policies and your access profile. Because of this customization, the features described in this guide might appear or act differently on your system. Contact your Workforce Timekeeper administrator for more information.

Logging On and Off

Log on to Workforce Timekeeper by accessing the appropriate Web address (URL) in your browser. Because the logon process is different at every company, contact your Workforce Timekeeper administrator for instructions. The default URL is:

```
http://<webserver>/wfc/logon
```

where *<webserver>* is the name of your application server.

After you log on, the system checks your access profile and uses your display profile to open your default Workforce Timekeeper view in the browser. The view is customized to satisfy your company's requirements.

When you finish using Workforce Timekeeper, you should save your edits and click Log Off. If you do not save your changes before clicking the Log Off button, the following occurs:

- If you use Internet Explorer, a message warns you that you have unsaved data and you can choose to continue the move and lose your changes or you can cancel the move and save your changes.
- If you use Netscape or a Macintosh system, unsaved data is lost.

Logon Time Limit

If you are logged on for a period of time and the Workforce Timekeeper system detects no activity, a message appears, informing you that your session is about to time out. You must enter your password and click Log On to continue your session where you left off.

After you enter your password, another message appears, "Your Logon was successful."

Understanding the Display

Each Workforce Timekeeper component contains three display elements:

- Browser toolbar and menu
- Workspace
- Navigation bar

The browser toolbar and menu vary depending on whether you use Internet Explorer or Netscape.

The workspace is the primary area for displaying the Workforce Timekeeper components. Within the workspace is a header that contains the component name, menus, and other controls such as drop-down lists.

Browser toolbar and menu

Navigation bar

Workspace
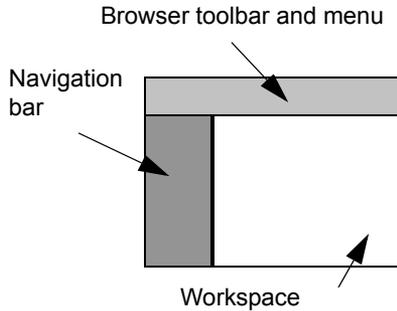
The selections on the navigation bar vary, depending on your company's policies and your access profile. All users have access to the following options:

- Log Off and Change Password links.
- Minimize and maximize button in the upper-right corner, which allows you to reduce the size of the navigation bar and restore its default size with one click. You can also resize the navigation bar and the workspace by dragging the frame border with the mouse.

The Workforce Timekeeper components that you can access are grouped by category on the navigation bar. Categories include:

- **My Genies™**—Configurable tools for automating manager tasks by displaying a summary of selected employee information.
- **Timekeeping**—Configurable Genies for performing operations on one or a group of employees.
- **Productivity Monitor**
- **Group Edits Results**—A method of performing the same operation on multiple employees, such as a punch edit or granting a bonus.
- **Reports**—Component used to generate standard or custom reports.
- **My Information**—Components used to manage your own time: My Timecard, My Reports, Time Stamp, or My Earnings History. If your company uses the HR/Payroll product, you might also see the Employee Home Page link, which you can use to view and make changes to your benefits information.

- **Transaction Assistant**—Error reporting and correction for imported data
- **Record Locator**—Finds specific records in archived databases
- **Inbox**—A private mailbox for auto-processed messages
- **Bid Editor**—An tool for accepting vacation, time off and other scheduled time.
- **Common Setup**—Components used for setup activities such as:
  – Creating and using HyperFind queries to search the database
  – Using the People Editor (New Person on the navigation bar) to define or modify access profiles, job assignments, and other information for individuals or groups of people
  – Setting organizational maps and jobs
  – Setting worker types that reflect the conditions of the person's availability to work
  – Adding labor level sets or organizational sets
  – Importing information
  – Setting up reports
- **Scheduler Setup**—Basic scheduling components such as:
  – Establishing schedule templates and time periods for scheduling
  – Configuring schedule rules
  – Using the schedule assistant tool to find the most qualified person to fill an open shift or to find a replacement employee for a shift based on criteria selected by the user
  – Using Workload Setup to manage your workload (staffing) plan
- **Forecaster Setup**—Includes components to configure scheduling forcasts and coverage.
- **Calendar Views Setup**—Includes setup for generic calendars, including the Work & Absence Summary, calendar profiles for assigning calendars to employees, data sets, which are comprised of data elements (look, feel, types of data), and shift start time bands.
- **System Configuration**—Components that system administrators use to manage system information and system settings.
- **My Links**—Optional links that your company may set up
- **Help**—Invokes the online help.

If you use other Kronos products, such as Workforce HR™, Workforce Payroll™, Kronos® Workforce Scheduler™, or Kronos® Workforce Activities™, additional links will appear on your navigation bar.

Using a Browser

Although the Workforce Timekeeper user interface contains numerous navigational buttons, dialog boxes, and drop-down lists within the workspace of each component, standard browser controls are also available.

The browser controls have the following characteristics:

- **URL Address combo box** displays only the URL of the logon page and the URL of the Workforce Timekeeper main page.
- **Favorites (Bookmarks)** allow you to add the Workforce Timekeeper URL to your browser's Favorites list or bookmarks. You can then click on the bookmarked entry to launch the Workforce Timekeeper Log On display.
- **Back and Forward buttons** allow you to return to pages that you previously accessed during the current session. If you do not save your changes before clicking the Back button, the following occurs:
  - If you use Internet Explorer, a message warns you that you have unsaved data and you can choose to continue the move and lose your changes, or cancel the move and save your changes.
  - If you use Netscape or a Macintosh system, unsaved data is lost.
- **Refresh (Reload)** reloads Workforce Timekeeper in its default state. It does not refresh the Workforce Timekeeper information.
- **Stop** does not interrupt loading Workforce Timekeeper pages.
- **Print** enables you to print reports from My Reports. In other Workforce Timekeeper components, however, clicking the browser Print button only prints the navigation bar; you must use the print controls within Workforce Timekeeper.

Browser Settings

For optimum viewing, your monitor should be set to 1024 x 768, 16-bit resolution. You should maximize your browser window and use no more than three rows of stacked browser toolbars in order to make all functions in the applets usable.

The following must also be enabled in every browser machine that accesses Workforce Timekeeper:

- **Non-persistent cookies***, which are also called session or temporary cookies. A non-persistent cookie is stored in memory only for your current browsing session. It is deleted from memory when you log off or close your browser.
- **JavaScript**, which is a compact, object-based scripting language for developing client and server Internet applications.

In addition, the following types of software require special consideration if they are installed on your PC:

- **Pop-up-blocking software** must be configured to allow the Workforce Timekeeper application server to open pop-up windows.
- **Third-party automatic download software**†, such as WinAmp, must be disabled before you log on to the Workforce Timekeeper server for the first time. After the system installs the JRE software, you can reactivate the automatic download software.

If you are having trouble accessing Workforce Timekeeper, it may be because of one of these settings. See your Workforce Timekeeper administrator for more information.

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* A cookie is a small text file that contains a unique identification number that a Web site sends to your computer's web browser.

† Third-party automatic download software is any program that intercepts the browser's normal download process. Such software does not include programs such as File Transfer Protocol (FTP).

Accessing Key Components

The components that managers typically access include:

- **People Editor**—Use this component to maintain people records and Workforce Timekeeper licenses.

- **Kronos**® Workforce Genie®—Use the three configurable Genies: Detail, Rollup, and QuickFind, as an easy way to review your employees' time at a glance. Open a more detailed view if you need additional information.

- **Timecard**—Employees use the Timecard component to enter, review, edit, and approve their time. You can then review, edit, or approve employee timecards and release the information to your payroll department. The timecard component is available in Java or HTML versions.

- **Time Stamp**—Employees use this component in a way similar to punching a data collection device. The employee logs on and clicks the time stamp to record in and out times. The Time Stamp component is available in Java or HTML versions.

- **Scheduler**—Use these basic scheduling tools to create, view, and adjust employee schedules.

- **Searching**—Two types of searching capabilities are available: HyperFind for customizable queries and QuickFind for quickly locating employee records.

- **Reports**—Run reports that summarize employee, people, or user data in a variety of ways. You can also generate reports about your Workforce Timekeeper configuration. Standard reports and custom reports are available.

- **Event Manager**—Enables you to schedule a task to be executed automatically.

- **E-mail**—Send the output of a task, including reports, as an e-mail attachment. You can also send reminders to people to perform certain tasks, such as to correct or approve their timecards.

Workforce Timekeeper also contains the following components for system administrators or for when you are initially configuring your system:

- **Import**—You can quickly enter large quantities of data from other sources into your Workforce Timekeeper database.

- **Workforce Central Setup**—Use this Windows application to define pay codes, work rules, and labor levels as well as to define access to components and customize the displays. Specify "hidden pay codes" to appear on Report Options or Report Totals, but are not included in the Timecard. Because most managers do not need to access these components, they are not described in this guide.

Navigating Workforce Timekeeper

In addition to the standard browser controls described in "Using a Browser" on page 11, you can select various Workforce Timekeeper components using the navigational buttons, dialog boxes, and drop-down lists that are located within the workspace of each component.

Note: Only one Workforce Timekeeper browser session should be active at a time. Do not start additional Workforce Timekeeper sessions in separate browser windows.

Using Online Help

All components within Workforce Timekeeper include access to online Help:

Select the Help icon located in the upper-right corner of the workspace to obtain help for the visible component.

Click the Help link at the bottom of the navigation bar.

Click the Help button in individual dialog boxes to obtain help about the visible dialog box.

Note: Pressing the F1 key or selecting Help from the browser's menu bar invokes online Help for your browser, not for Workforce Timekeeper.

After the online Help opens, you can navigate it by:

- Selecting a topic from the left side of the workspace.
- Clicking a linked word.
- Selecting a topic from a Related Topics list.
- Clicking an entry in the index
- Searching for a specific term

Understanding Menus and Dialog Boxes

The Workforce Timekeeper menu bar is located in the header of the workspace. For example, the following timecard contains eight menus: Save, Actions, Punch, Amount, Accruals, Comment, Approvals, and Reports.

When you click a menu name, a drop-down list of menu options appears. You can then select one of the options. The header for the timecard example shows the Actions menu with five options: Refresh, Calculate Totals, E-mail, Print, and Print Screen.

For example, to view the most recent information from the database in the visible timecard, select the Actions menu and click Refresh (**Actions** > **Refresh**).

Depending on the active component, a number of dialog boxes as well as additional menus and options can help users record their time.

Entering Information

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

- **In cell editing**—Many timecard functions allow you to enter, edit, and delete information directly in the cell using the keyboard.

- **Menus**—The menus and options along the top of the timecard workspace allow you to make additional selections.

- **Right-clicking**—In certain circumstances, right-clicking is an alternative to using the menus. In these cases, when you right-click, a shortcut menu opens.

In	Transfer	Out
8:00AM		5:00PM
7:00AM		6:00PM
	Add Comment...	
	Edit Punch...	

For example, if you right-click within a punch cell in a timecard, you can select Add Comment or Edit Punch from the shortcut menu.

Using the Launch Buttons

Depending on the rights granted to you in your access profile, up to four launch buttons appear in the upper-right corner of the workspace. Use these buttons to navigate from one component to another. For example, if one of the Workforce Genies is open in your workspace, you can select one or more employees and then click the Timecard launch button to open the selected employee timecards.

Refreshing the Display

All components provide the capability to refresh the screen display and cancel all edits that you made since the last time that you saved the information. This refresh occurs within the Workforce Timekeeper workspace and not in the browser controls. For example, you can refresh the timecard by selecting **Actions** > **Refresh**.

Changing Your Password

Depending on your company's poli-
cies, you might need to change your
password after you first log on to the
Workforce Timekeeper system.

Change Password – Microsoft Internet Explorer

Change Password

User Name cfryman

Old Password

New Password

Verify Password

Change Password Now   Cancel

- In some companies, the
  Change Password box opens
  automatically when you first
  log on.

  You might also see a message
  such as, "Password change required by System Administrator."

- In other companies, you can change your password by clicking
  Change Password at the top of the navigation bar.

To change your password:

1. Enter your old password.
2. Enter your new password and then enter it a second time in the
   Verify Password box.
3. Click Change Password Now.

If your company uses the Kronos Workforce HR or Workforce Payroll
products in addition to Workforce Timekeeper, you must use the same
password to access both systems. See your Workforce Timekeeper
administrator for details.

Tracking Employees

With Workforce Timekeeper v5.2, you can organize your employees' time and attendance, as well as their schedules, by labor account or job within an organizational map.

A labor account structure differs from a job and organization map in that labor accounts represent the cost centers within an organization where hours are tracked, while organizational maps represent where employees work and where they can be scheduled.

Grouping Employees by Labor Account

A labor account is a hierarchical structure of labor level entries that uniquely specifies an account from which an employee is paid. A labor account consists of up to seven labor levels.

All employees are assigned a default labor account, called a primary labor account. If their access rights allow, employees can transfer to different labor accounts from within the timecard, in group edits, and when scheduling.

A labor level set is a group of labor level entries and contains at least one entry from each of the defined labor levels.

You can use a labor level set for a group edit, in which you apply the same operation to the groups of employees who belong to the labor level set. For example, you could use a labor level set to do the following:

- Define the labor levels that a manager or employee can use to make transfers.
- Assign groups of people to a specific manager. Then, with those labor level sets, you can create reports or HyperFind queries that only return results for the employees who report to that manager.

Grouping Employees by Job

To use the job option, you begin by creating an organizational map that shows the hierarchy of all jobs in your organization and the location of each job. Locations and jobs in the organizational map can be associated with labor level entries. This provides a level of account validation because each organizational job in the system has its own labor account, and a person cannot be transferred to a job that does not exist.

When using the job option, employees have a job assignment that defines what and where a person can work and includes, but is not limited to:

- **Primary organizational job**—Job that an employee was hired to work
- **Schedule job list**—Organizational job(s) that an employee can be scheduled to work
- **Job transfer set**—Organizational jobs to which an employee can transfer
- **Pay rule**, **wage rule**, **wage profile**

When using the job option, you also create groups of jobs called organizational sets. You can designate the organizational sets to be used in organizational groups, in job transfer sets, or both. You should define the organizational sets before you add new people so that job transfer sets and/or organization groups can be assigned to people when you enter them into the system.

Once created, organizational structures and jobs appear in many of the Workforce Timekeeper components, for example:

- You can create HyperFinds based on organizational jobs to use in Genies and Reports.
- In the timecard, you can transfer between organizational jobs.
- The People editor includes a new Job Assignment tab that you use to assign a job to an employee.
- You can schedule transfers and select groups of employees to schedule using an organizational structure selector.
- New Genie columns have been added that reference primary organizational job information.
- You can generate reports based on organizational jobs, as well as labor accounts

For more information about organizational maps, jobs, and labor level sets, refer the Workforce Timekeeper online help.

Workforce Genies

With Workforce Genies, you can set up summary displays that allow you to:

- See summary information such as hours, exceptions, and schedules for your employees.
- Make group edits for all, one, or a selected group of employees.
- Select a specific employee to view or edit more detailed information.

The information visible in the columns varies, depending on your company's requirements and your display profile.

After the information appears, you can select an employee for further exploration, or select multiple employees to make group edits or launch a different Workforce Timekeeper component for those employees.

Using Workforce Genies

Three types of Workforce Genies are available:

- Detail
- Rollup
- QuickFind

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

Rollup Genies are based on labor accounts. They allow a payroll clerk or administrator to view summary information for a large group of

employees. The Pay Period Close Rollup Genie summarizes employee information by primary account location and department.

| Pay Period Close | Show: All Home | Edit |
| Last Refreshed: 10:59 | Time Period: Current Pay Period | Refresh |

| Actions | Punch | Amount | Accruals | Pay from Schedule | Approvals | Person |

Name 1▲	Employee Approval	Manager Approval	Signed Off	Missed Punch	Unexcused Absence	Expected PP Hours
Dolan, Bruce		0				
Fryman, Christy		0			✔	
Rifkin, Alex		0				
Wong, Janet		0				

QuickFind Genie allows you to search for one or more people, based on their name and ID. You can also use wildcard characters (* % _ ?)

| QuickFind | Name or ID: * | Find | Timecard People Reports |
| Last Refreshed: 9:39 | Time Period: Week to Date | | |

| Actions | Punch | Amount | Accruals | Pay from Schedule | Approvals | Person |

Name 1▲	ID	Primary Labor Account
Dolan, Bruce	214	103/201/307/403/501/603/703
Fryman, Christy	203	103/201/307/401/501/601/701
Rifkin, Alex	211	103/205/309/405/501/603/703
Wong, Janet	213	103/201/308/401/501/601/703

Selecting One or More Employees

To display additional information about one employee from a Workforce Genie, double-click the employee name to open the employee's timecard. Alternatively, you can select the employee name, and then click the Timecard, Schedule, or People launch buttons.

To display additional information about more than one employee, hold down the Ctrl or Shift key and select multiple employee names. Then, click the applicable launch button.

Depending on the launch button clicked, the Timecard, Schedule, or People Editor opens with the first employee of the group visible. For example, in the Timecard component, the name and ID of the first employee selected appears at the top of the timecard grid.

To access other employees, either click the arrow buttons or the down arrows in the Name & ID boxes.

| Name & ID | Tesch, K L | 1 | ⬅ ➡ | 4 of 33 |

Exporting Genie information to an Excel file

You can export the data in a Genie to an Excel spreadsheet.You can export the data either as a standard Excel format (.xls) file or as a Comma Separated Values (.csv) file.

- To export the data in a Genie as a standard Excel file, choose Actions > Export to Excel from the Genie menu.
- To export the data in a Genie as a CSV file, choose Actions > Export to CSV from the Genie menu.

Using Timecards

As a manager, you can review, edit, or approve the timecards of the employees who report to you. You can access one timecard or many timecards at the same time.

To open an employee's timecard from a Workforce Genie, double-click the employee's name. When the employee's timecard appears, select the time period to review from the Time Period drop-down list.

Depending on your company's timekeeping requirements, the Workforce Timekeeper administrator configures each employee's timecard to display an hourly view or a project view.

A timecard with an hourly view displays an employee's start and stop times each day, for example:

A timecard with a project view displays an employee's total number of hours each day, organized by labor accounts, for example:

Calculating and Displaying Timecard Totals

When you edit and save a timecard, your edits must be calculated and sent to the database by a Workforce Timekeeper software component called the Totalizer. The Totalizer takes available employee data, applies the correct rules and policies, and computes totaled data, which ensures that pay rules are applied automatically and consistently across your organization.

Two Workforce Timekeeper components access the Totalizer:

- **Background Processor** runs continuously, and updates totals at specified intervals. It is used to off-load computationally intensive work from the application server.

  For example, assume that you set the update interval of the Background Processor to 30 seconds. After remaining idle for 30 seconds, the Background Processor recalculates totals for all employees whose totals are no longer up to date. The Background Processor is then idle for 30 more seconds before calculating totals again. You can set the update interval to as little as 1 second, or as long as 99 hours.

- **Callable Totalizer** invokes the Totalizer interactively in the user interface to total employees whose totals have not yet been computed by the Background Processor and are not up to date. It does not send the totals to the database. Totals that are generated online by the Callable Totalizer must be generated a second time by the Background Processor in order to save the values in the database.

  If you have access rights to the Callable Totalizer, timecard entries are automatically totaled if they are not up to date when you open the timecard. Timecard entries are also totaled if necessary when you click **Actions > Calculate Totals**.

  Additionally, some organizations might use the auto-totalize or "on-the-fly" feature, where entries are totaled automatically when you move to another row.

In most cases, you have little or no direct interaction with the Callable Totalizer or Background Processor, although understanding how they work will help you to understand how your Workforce Timekeeper system calculates timecard totals. For information specific to your system, contact your Workforce Timekeeper administrator.

Timecard Indicators and Colors

The appearance of timecard cells changes to indicate a number of different conditions:

Indicator	Description
9:37AM	A solid red cell indicates a missed in-punch or out-punch. Point to the red box for more information.
5:11PM 9:36 11:04AM	A red outline in a cell indicates an exception. Point to the cell for more information.
	Examples of exceptions include:
	• A late or early punch
	• A long interval, such as a long lunch
	• A core hours violation, which appears only if your company uses the Core Hours option. Core Hours allows you to specify certain business hours when employees are required to be present at work. See your Workforce Timekeeper administrator for information specific to your company.
Mon 1/28 Tue 1/29 Absent 8:00 Wed Excused	A blue outline in a date cell indicates an excused absence.
2:59PM	A small yellow note icon after a punch or amount indicates a comment about the cell's contents.
	Point to the icon or select the Comments tab at the bottom of the timecard workspace to view the comment.
8:30 1:00	A transaction shown in purple indicates that the transaction was added by the Callable Totalizer.
	If the cell is white, you can edit the transaction. If the cell is gray, you cannot edit the transaction.
7:00AM	A small yellow note icon and red outline indicate that a punch or amount has a comment and an exception.
Sun 3/18	A red border around a date cell indicates an unexcused absence day.
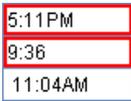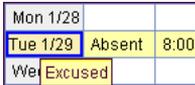
Indicator	Description
Total 1:00	Gray cells indicate that you cannot edit the contents.
Account (x)103/201/305/404/... (x)103/201/305/404/...	An (**x**) before a labor account in the Totals section indicates that the account is not the primary labor account.
Date Sun 4/15 Mon 4/16(x) Tue 4/17	An (**x**) after the date in the Schedule section at the bottom of the timecard indicates a transfer.
Date Sun 1/27(o) Mon 1/28(o) Tue 1/29	An (**o**) after the date in the Schedule section at the bottom of the timecard indicates a scheduled off-shift with an associated work rule.
Timecard Last Saved: 8:56AM	A gold bar across the top of the timecard workspace indicates that edits have not been saved in the database.
Totals & Schedule	When you edit a timecard, the system adds a red flag to the Totals & Schedule tab to indicate that the totals displayed in the timecard are out of synch with the data displayed in the timecard.

If you point to the employee name, the system displays the employee's pay rule, primary account(s), and standard hours (daily, weekly, and per pay period), for example:

Name & ID: Black, Mary 281
Time Period: Week to Date

Black, Mary
Pay Rule: Part Time
Primary Account(s):

1/01/1995-forever
Organization/Hospitals/Hosp A/Floor 1/ER/RN
Organization/Hospitals/Hospital A/Floor 1/ER/RN
101/202/301/401/-/601/701
Westside Plant/Stock Room/Shipping/SQA/-/Industrial Eng
/Personal Eng

Daily: 0.0 Weekly: 0.0 Per Pay Period: 0.0

Common Timecard Tasks

Some of the tasks that you may be able to perform on employee timecards include:

Task	Procedure
Add a comment to the timecard	Click the appropriate pay code, punch, or amount. Select **Comment** > **Add**. The Add Comment dialog box opens. Select a comment to apply to the pay code, punch, or amount.
Add a row	Select the Add Row icon.
Approve overtime	Select **Approvals** > **Approve Overtime**. See "Approving Overtime" on page 31 for details.
Calculate timecard total	Select **Actions** > **Calculate Totals** to synchronize the totals and data displayed. The system displays the accurate totals in the timecard and the red flag exits. The system does not save the edits; if you move to another task without clicking Save, the system prompts you to save or cancel your changes. This option only appears for managers.
Cancel edits	Select **Actions** > **Refresh**. The system returns information as it appears in the database. Any edits that you made but did not save are lost. If you already saved your edits, you cannot cancel them; you can, however, edit them if you have the applicable access rights.
Change timecard data in a locked pay period	Select **Amount** > **Add Historical** or **Add Historical with Retroactive Pay Calculation**. The Add Historical Amount dialog box opens. You can assign pay code edits to time or money in a signed-off or locked pay period. See "Modifying Previously Submitted Timecards" on page 33 for more information.
Delete a comment	Click the Comments tab at the bottom of the timecard and select the comment to delete. Then select **Comment** > **Delete** from the menu bar.
Delete a row	Select the Delete Row icon.

Task	Procedure
Edit a punch	Click the punch to edit and select **Punch** > **Edit**.
	The Edit Punch dialog box opens. Change the time zone, apply an override, or cancel automatic deductions.
	Note: To change a punch time, you must enter the corrected time directly in the cell.
Enter scheduled time	Depending on how Workforce Timekeeper is configured, you might be able to enter your scheduled time instead of a specific number of hours. Timecards configured with this option allow you to select "full sched day" or "half sched day" from a drop-down list in the Amount column.
	The Background Processor replaces "full sched day" or "half sched day" with the calculated time from your schedule.
Move a pay code amount	In the Totals section at the bottom of the timecard, click the amount to move and select **Amount** > **Move**.
	The Move Amount dialog box opens. Change the pay code, amount, effective date, or transfer an amount.
Save a timecard after editing	To save your edits, click Save from the menu bar. After saving your edits, the system responds differently, depending on your access rights:
	• If you have the function access point to totalize, the system refreshes the screen with totalized information and the red flag disappears.
	• If you do not have the function access point to totalize, the system saves your edits but does not refresh the screen (the red flag remains visible). The edits are processed the next time that the Background Processor is scheduled to totalize edits.
Send e-mail about a timecard	Select **Actions > E-mail.**
	Workforce Timekeeper can interact with the e-mail system defined in Workforce Central Setup. See "Sending E-mail About a Timecard" on page 38 for more information.
Sign off or approve timecard	Select **Approvals** > **Approve** or **Sign Off**. See "Approving or Signing Off Timecards" on page 31 for more information.
View changes to the timecard	Select **Reports > Time Detail**. Managers can filter this report by the source of the edit, such as a timekeeping device or the timecard, or by the editing managers.

Entering Time Off

To enter time off, such as sick or vacation time, select a pay code that describes the time not worked and enter the appropriate amount of time to apply to that pay code in decimal format (8.50) or hours and minutes (8:30)

Note: A decimal point or colon must separate hours and minutes if you have a partial hour. For example, if you enter 850, the system enters 850 hours.

Entering time off in an hourly timecard is different from entering time off in a project timecard.

In an hourly timecard, you enter the amount of time not worked in the Amount column instead of entering in- and out-punches for the time not worked. Note that you cannot have punches in the same row as amounts. Add a row by clicking the Add Row icon.

Date	Pay Code	Amount
Sun 4/01		
Mon 4/02		
Tue 4/03	Vacation ▼	8:00
Wed 4/04	Sick	
Thu 4/05	Sunday	
Fri 4/06	Travel	
Sat 4/07	Vacation	
Sun 4/08	Week-OT	
Mon 4/09	Weekend	
	Hours Wor ▼	

To enter time in an hourly timecard:

1. Click the down arrow in the Pay Code column, and select the appropriate time-off pay code from the drop-down list.
2. Enter the number of hours in the Amount column.
3. Click Save.

To enter time off in a project timecard:

1. Click the down arrow in the Pay Code column, and select the appropriate time-off pay code from the drop-down list.
2. Enter the number of hours in the applicable date column.
3. Click Save.

Transferring Time

Depending on your access rights, you may be able to transfer time to a different job, labor account, or work rule in the timecard.

Although you can enter the job, labor account, or work rule to which you want to transfer directly in the cell, you can also search for the appropriate information clicking the ▾ icon in the Transfer column and selecting Search from the drop-down list. The Select Transfer dialog box appears:

To transfer to a different labor account:

1. Click an option button in the Labor Account area to select the first labor level in the list of labor levels that you need in order to define the labor account.

2. Select the entry from the Available Entries.

3. Continue to select entries for the labor levels until the labor account is defined. If you leave some labor levels blank, the primary labor account is used for the blank levels.

To transfer to a different job:

1. Click the plus sign (+) next to each location in the hierarchy of the Job area until you see the job that you want.

2. Click the box next to the job so that a check appears.

3. If you know the job path, you can type it in Go To and click Show

To transfer to a different work rule, select a work rule from the drop-down list. The selected labor account or work rule then appears in the timecard.

Approving or Signing Off Timecards

The Timecard component of Workforce Timekeeper accommodates three types of approvals:

- Approve overtime
- Approve timecard
- Sign off timecard

Your access to these approvals is based on your company's policies and your access rights. Contact your Workforce Timekeeper administrator for information about the approval process at your company.

Frequency of Approvals

Your company's policies and your access rights determine the frequency with which you can approve timecards:

- A specific pay period
- A range of dates
- Daily

Note: If you previously approved some, but not all, of the days within the selected timeframe, then the act of approving again causes the days that were not previously approved to be approved.

Approving Overtime

Depending on how your Workforce Timekeeper system is configured, you might have the option of approving or not approving overtime charged by your employees. This should be done on a daily basis.

To approve overtime, select **Approvals** > **Approve Overtime** in the employee's timecard. The Approve Overtime dialog box appears in which you approve all overtime, no overtime, or some overtime for the date selected.

Note: Overtime can be approved in advance of it being worked. For example, a manager can approve overtime on a Friday for work that will be done on a Saturday.

Approving Timecards

Depending on your company's timecard-approval process, you might have several approval cycles. For example, the employee, supervisor, and department manager might each be required to approve timecards.

After you approve a timecard, you cannot make additional edits unless you have Remove Approval rights. Depending on how the approval process is configured for your company, a higher-level supervisor or manager might be able to change timecards that you have approved.

Each approval is recorded in the Audits tab and Sign-offs & Approvals tab, which are visible at the bottom of the Timecard workspace.

To approve a timecard:

1. Select an employee from one of the Workforce Genies and click the Timecard launch button.
2. In the timecard, select the a pay period or a range of dates from the Time Period drop-down list.
3. Select **Approvals** > **Approve**.

To approve a group of timecards, see

Signing Off Timecards

Signing off a timecard prevents further edits to the timecard. Typically, one manager is granted the right to sign off timecards before submitting them to your company's payroll system; employees do not have sign-off rights.

The process for signing off a timecard is the same as for approval, but you select **Approvals** > **Sign Off**.

Some systems are configured so that you cannot sign off employee timecards if they have missing punches, unexcused absences, or no hours in a specified pay code. See your Workforce Timekeeper administrator for information specific to your company.

 After you sign off data, you might be able to remove the sign-off if you need to make edits. Note that Sign Off and Remove Sign-off are separate access rights. If you do not see the Sign Off or Remove Sign-off options in your Approvals menu, you do not have the access right to use them.

Depending on your access rights, you might also be able to use historical edits to enter, add, subtract, or move hours in a signed-off period. See for more information.

Printing a Timecard

You can print the entire timecard, including exceptions, or you can print the timecard as it appears on the screen.

To print a timecard:

1. Select **Actions** > **Print** or **Actions** > **Print Screen**.
2. Click Print in the Print dialog box.
3. Click Yes when you see the warning, "An applet would like to print. Is this OK?"

If you select **Actions** > **Print**, the system prints the timecard grid and the table that is visible at the bottom of the Timecard workspace (Totals, Accruals, Comments, Audits, and so forth). All rows are printed, including those that might be hidden by scrolling.

If you select **Actions** > **Print Screen**, only the portion of the timecard that appears on your screen is printed.

Note: If you use the browser's Print command, only the Workforce Timekeeper navigation bar is printed.

Modifying Previously Submitted Timecards

Edits made to an employee's timecard in a signed-off or locked pay period are called historical edits. For example, if an employee earned vacation time in the past and an error was made in the vacation hours charged, you can enter a historical edit to adjust the amount of time.

To adjust the time charged in the past:

• Include the amount in the current period totals. The edit is made to the historical period and included in the current pay period.
• Do not include the amount in the current period. This type of edit is used to keep an accurate record of corrected time or money only in the historical period.
• Have the Workforce Timekeeper system re-calculate the totals, based on the employee's current pay rule, determine the difference between the new totals and the original totals and put the resulting amount as a historical edit into the current pay period with an effective date for the historical period.

Depending on your access rights, you can add, delete, or move historical edits as follows:

1. If necessary, select the applicable employee name from the Name & ID box and select the Current Pay Period from the Time Period drop-down list.

2. Click **Amount** and select one of the following historical edits options from the drop-down list:

   • Add Historical

   • Add Historical with Retroactive Pay Calculation

   • Move Historical

   • Delete Historical

3. Enter, add, subtract, or move hours in the Historical Amount dialog box and click OK.

Historical edits automatically appear in the Audits and Historical Amounts tabs at the bottom of the Timecard workspace.

You cannot make historical edits for the current pay period.

Obtaining Information About Accruals

Accruals are amounts of time or money that employees earn or accumulate over time, based on your company's employment terms and policies. Some of the most common types of accruals include:

- **Time off**—For example, personal, vacation, and sick time.
- **Flexitime* balance**—For companies that have a flexitime policy, a special flexibalance accrual code allows you to monitor compliance with the flexitime policy.
- **Money**—For example, bonuses, travel allowance, or uniform allowance.

The Accruals tab is located at the bottom of the timecard. It allows you to view accrued time or money that belongs to the employee of the visible timecard. You cannot edit accruals in the timecard.

Totals & Schedule	Accruals	Audits					
Accrual Code	**Balance as of Selected Date**	**Units**	**Furthest Projected Taking Date**	**Projected Takings**	**Projected Credits**	**Projected Balance**	**Balance without Projected Credits**
Personal	0:00:00	Day	9/09/2002	0:00:00	0:00:00	0:00:00	0:00:00
Sick	0:20	Hour	9/09/2002	0:00	0:00	0:20	0:20
Vacation	13:18	Hour	1/02/2003	8:00	53:12	58:30	5:18

The following information is included for each type of accrual:

- **Accrual Code**—The code that identifies and holds the type of accrual balance, such as vacation, sick, or floating holidays.
- **Balance as of Selected Date**—A number that represents the balance available, for example, if you have 40 hours of vacation available, this number is 40.
- **Units**—The unit that is associated with an accrual code. Accrual codes are measured in days, hours, or money.
- **Furthest Projected Taking Date**—The furthest date in the future when a taking is scheduled that affects this accrual code. this date can be a time frame or a specific date up to two years out. The total is immediately recalculated in the Totals and Summary tab.
- **Projected Takings**—The total amount of time or money scheduled to be used (taken) from the end of the visible pay period through the Furthest Projected Taking Date.
- **Projected Credits**—The total amount of time or money scheduled to be granted (fixed grants) from the end of the visible pay period through the Furthest Projected Taking Date.

* Flexitime is a policy that allows employees to work a predetermined total number of hours over a longer period of time. For example, employees might be able to vary the time that they work each day as long as the total is 40 hours per week.

- **Projected Balance**—The balance for the accrual code as of the Furthest Projected Taking Date, including projected credits and debits. The projected date can be specific or a time frame that you select from the Show list.
- **Balance without Projected Credits**—The accrual balance as of the Furthest Projected Taking Date, without the projected credits.

Depending on how Workforce Timekeeper is configured, you might also be able to see a subset of accrual information when you click the Totals & Schedule tab at the bottom of the timecard. This alternative allows you to review totals, schedules, and accruals at the same time.

Subset of accrual columns

Some of the rules that Workforce Timekeeper uses to calculate accruals include the following:

- Projected credits are based on fixed grants not earned grants.
- Workforce Timekeeper calculates the accrual information based on the date selected. Accrual totals are updated only after the timecard is totaled.
- If hours have accrued, but the employee is still in a probation period, the employee's probation status is indicated by enclosing the hours or money values in parentheses.

Example

Assume that you are looking at your own timecard and you want to see how much vacation time you have this week and how much vacation time you will have available next January.

- To view this week's vacation balance, select Week to Date in the Time Period box and select a day displayed in the grid. When you click the Accrual tab, your available vacation time is displayed in the column labeled "Balance as of Selected Date."
- To view your vacation balance on January 1, select Specific Date from the Time Period box and use the calendar to locate January 1. Then, select January 1 in the timecard grid, enter a number of vacation hours, and save the timecard. When you click the Accrual tab, your vacation balance as of January 1 is displayed in the column labeled "Balance as of Selected Date."
- If you return the timecard to the current week, your vacation balance shows the amount accrued for the current week, but the Projected Takings, Projected Credits, and Projected Balance columns display information based on the Furthest Projected Taking Date, which in this example is January 1.

Sending E-mail About a Timecard

You can access your company's e-mail system to send a message about a timecard without exiting Workforce Timekeeper.

1. Display the timecard about which you want to send a message and select **Actions** > **E-mail**.

    Your e-mail dialog box opens with the following information:

    –   E-mail address of the person whose timecard you selected

    –   Subject box identifying the employee name, ID number, and time period

    For example, if your company uses Microsoft Outlook and you need to send a message to Kim Tesch, whose ID is 12, to ask her to approve her timecard, the following dialog box opens:
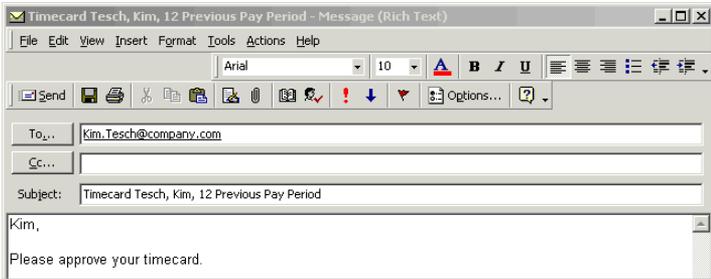
2. Change the recipient's e-mail, if necessary, enter a message, and send the e-mail.

After receiving the message, if the recipient has the appropriate access rights, he or she can log on to the Workforce Timekeeper system to access the timecard.

Group Editing

With the group editing feature, you can edit groups of employee timecards at a single time. Examples of the most commonly used group edits include:

- Payroll lock
- Sign-off
- Add or delete hours

- Move hours
- Add punch
- Delete punch

To make a group edit from one of the Workforce Genies:

1. Hold down the Ctrl or Shift key and select one or more employees. To select all employees, select **Actions** > **Select All**.

2. Select an option from one of the available menus, and complete the applicable dialog box

You can make group edits from the following **Menu**>**Options** selections:

Menus

Options

Menu/Option	Result
Actions Menu	
Select All	Selects all of the employees that are listed in the Genie.
E-mail	Opens the e-mail dialog box addressed to the person selected from the Genie list.
Print	Prints the selected information.

Menu/Option	Result
Punch Menu	
Add	Opens the Add Punch dialog box. This box is where you can override a punch, enter a labor transfer, cancel an automatic deduction, or add a comment.
Delete	Opens the Delete Punch dialog box. This box is where you can delete a punch or add a comment to the deleted punch.
Amount Menu	
Add	Opens the Add Amount dialog box. This box is where you can add an amount to a group of employees. The amount can include a labor transfer.
Delete	Opens the Delete Amount dialog box. This box is where you can delete an amount from a group of employees. The amount can include a labor transfer.
Add Historical	Opens the Add Historical Amount dialog box. This box is where you can make a pay code edit in a signed-off or locked pay period.
Add Historical with Retroactive Pay Calculation	Opens a dialog box in which you can enter information so that the Workforce Timekeeper system does the following: 1. Recalculates the totals, based on the employee's current pay rule 2. Determines the difference between the new totals and the original totals 3. Puts the resulting amount as a historical edit into the current pay period with an effective date for the historical period.
Delete Historical	Opens the Delete Historical Amount dialog box. This box is where you can delete an historical edit.
Delete Historical with Retroactive Pay Calculation	Opens a dialog box in which you can enter information to delete a retroactive historical amount edit.

Menu/Option	Result
Accruals Menu	
Update	Opens the Update Earned Accruals dialog box. This box is where you can change the accrual code and amount earned for a particular date.
Reset	Opens the Reset Accrual Balances dialog box. This box is where you reset the amount for an accrual code on a specific date.
Pay Out	Opens the Pay Out Accruals dialog box. This box is where you can select an accrual code and time period to pay for accrued time.
Suspend & Reinstate	Opens the Suspend and Reinstate Accruals dialog box. This box is where you can stop or restart the earning limits, carryover limits, or accrual code grants.
Group to Employee	Opens the Group to Employee Accrual Transfer dialog box. This box is where you can transfer accrual amounts from a group of employees to an employee.
Group to Pool	Opens the Group to Pool Accrual Transfer dialog box. This box is where you can transfer accrual amounts from a group of employees to an accrual pool.
Pool to Employee	Opens the Pool to Employee Accrual Transfer dialog box. This box is where you can transfer an accrual amount from an accrual pool to an employee.
Pay from Schedule Menu	
Add	Opens the Pay from Schedule dialog box. This box is where you can temporarily pay a group of people from their schedule.
Delete	Opens the Stop Pay from Schedule dialog box. This box is where you can cancel pay from schedule.
Suspend for Specific Date	Opens a dialog box in which you can enter information to temporarily stop pay from a schedule for a set of employees in a Genie.
Delete Suspension	Opens a dialog box in which you can stop a temporary pay from schedule suspension.
Approvals Menu	
Approve	Adds your approval to the selected timecards.
Remove Approval	Removes your approval from the selected timecards. It does not remove approvals made by other users.

Menu/Option	Result
Approve Overtime	Opens the Approve Overtime dialog box. This box is where you approve all overtime, no overtime, or some overtime for a group of people.
Sign Off	Indicates the final approval. Typically, if you select this box, Workforce Timekeeper closes the selected employee records so they can be processed by payroll.
Remove Sign-Off	Removes your timecard signoff.
Lock Payroll	Locks through the most recent signed-off pay period prior to the effective date selected and prevents any further edits.
	Signoff cannot be removed after the payroll is locked. If you need to add, delete, or move hours in the locked pay period, you must make historical edits.
	Warning: Because Payroll Lock cannot be removed, perform this function with extreme care, noting exactly the effective date before which locking will occur.
Person Menu	
New	Opens the People Editor with all fields blank so you can add a new person.
Duplicate	Opens the People Editor with the same labor account and effective date as the selected person. You can add a new person by changing the applicable information.
Edit	Opens the People Editor populated with the selected people's information.
Delete	Deletes the selected people and, if the user has the appropriate access rights, deletes all associated transaction data.

Group edits are processed by the application server, not by your PC. Consequently, depending on your system configuration and the complexity of the group edit, it might take several minutes for your edit to be completed. After you make a group edit, you can continue to work on the Workforce Timekeeper system.

When the system finishes processing the group edit, the system writes a description of the edit along with its status to the Group Edit Results log. To retrieve this log, use the Group Edit Results link on the navigation bar. The log shows the last 10 group edits that you made and the status of

each, with the latest edit listed first. If the edit has not been completed, its status is PENDING. Click Refresh until the status is COMPLETED.

Group Edit	Date	Time	User Name	Status	Results
Remove Approval Pay Period: Previous Pay Period	09/12/2003	11:00AM	SuperUser	COMPLETED	Success:0 Failure: 41 Details Total: 41
Approval Pay Period: Current Pay Period	09/12/2003	10:35AM	SuperUser	COMPLETED	Success:41 Total: 41

Group Edit Results
Last Refreshed: 09/12/2003 11:11AM

Use the browser's Print command to print this page.

Refresh

If a failure occurs, a link to the failure explanation appears. You can follow this link to resolve the problem. All group edits and the name of the person who submitted each edit are visible in the Audits tab.

Transferring Time

Depending on your access rights, you may be able to transfer time to a different job, labor account, or work rule when you make a group edit. Most of the Punch and Amount menu options contain a Transfer box.

The process for transferring time with a group edit is essentially the same as transferring time directly in a timecard. See "Transferring Time" on page 30 for more information.

Calendars

Calendars are a means of viewing an employee's activity over a period of time. You can use calendars to view a time period in the past, a future time period, or both past and future periods.

You can choose three different calendar views: by week, by month, or by multiple months. You can also display detailed information for any specific day. The type of information that is displayed in a calendar depends on the calendars that are included on your system and how your administrator has configured them.

Employees can use calendars to review past and planned hours worked, to schedule or review time off, and to review and track attendance. Managers can use calendars to review employees' hours worked, to plan and review employees' requests for time off, and to review and track employees' attendance.

Using and Understanding My Calendar

The calendar view displays past and planned events for individuals. Your administrator determines the specific events that are displayed and the calendar views that are available to you.

If you are logged on as a manager, you can choose the individual calendar that you want to view by selecting a HyperFind query from the Show drop-down list or by using the Name & ID drop-down lists.

You can modify the period of time that is displayed in the calendar view by clicking the Time Period drop-down list, choosing a time period, and clicking Apply. To choose a specific range of dates, select Range of Dates from the drop-down list, enter the start and end dates (or select them from the drop-down calendar), and click Apply.

You can also choose the time period width of each row in the calendar. Select Week, Month, or Multiple Months, and then click Apply. If you choose multiple months, the number of months is determined by your administrator during the calendar setup process.

Note that certain days of the calendar are color-coded, either with a background color or with a border. To see the meaning of these color codes, click Legend on the menu.

You can also display information for a specific day by highlighting the day on the calendar and then clicking Day Detail.

Using Calendars to Manage Employee Time

Managers can use calendars to review employees' hours worked, to plan and review employees' requests for time off, and to review and track employees' attendance.

Generic calendars that are included can be modified and duplicated to contain information that is relevant to the individual's role and responsibility. The Work & Absence Summary is one of the generic calendars.
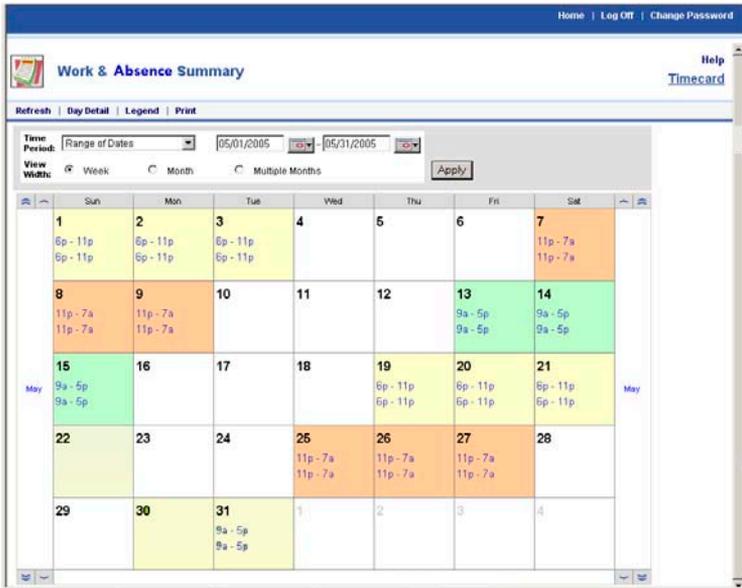
Managers can use calendars to look for trends over time. The colors and text attributes, combined with the drill-down capability enable the manager to reference one or more days, and continue to see more data.

Sending Workflow Notifications

With workflow notifications, messages can be sent automatically to selected people when exceptions or other events occur. For example, you can have a message sent automatically to the payroll administrator when a manager signs off employee timecards.

Workflow notifications can only be set up by your Workforce Timekeeper administrator and can include the following types of notifications:

Type of Notification	Description
Pay period based	The system sends messages automatically at a certain time in the pay period. For example, a weekly reminder can be sent to employees to approve their timecards or to managers to sign off timecards.
Group edit	The system notifies the manager who initiated the group edit that the edit was successful or that it failed.
Timecard approved or signed off by manager	The system sends a notification to each employee that his or her timecard is approved or signed off by the manager.
Timecard manager edit	The system notifies the employee when a manager edits the employee's timecard after the employee approved it.

Searching for Employees

Workforce Timekeeper provides two ways to search the database for information about one or more employees: QuickFind and HyperFind.

Finding Employees with QuickFind

QuickFind lets you search for one or more people by name or ID number.

To use the QuickFind feature:

1. Select **My Genies** > **QuickFind** on the navigation bar.
2. Enter an employee name or ID with or without wildcard characters (* % _ ?).
3. Click Find.

When the system returns the requested information, you can:

• Double-click an employee name to open the employee's timecard.
• Select an employee and click the Timecard, Schedule, or Reports launch buttons.

Finding Employees with HyperFind

You can use HyperFind to find one or more employees with specific attributes. When generating reports, scheduling employees, and editing timecards, you can use queries created by authorized Workforce Timekeeper users to search for people in the system.

Depending on your access rights, three types of queries might be available to you: public, personal, and ad hoc.

Type	Description
Public	Public queries are available to all Workforce Timekeeper users whose access rights allow them to access information about other people. You use these queries, which appear in bold type, from the Show drop-down list.
Personal	Only you can access your personal queries from the Show drop-down list. You might use a personal query to search for people based on criteria not available in a public query, for example, employee ID or labor accounts worked.
Ad Hoc	You create and save ad hoc queries for use during the current session only. Ad hoc queries are useful in unique situations for which no public or personal queries are created.

Creating a HyperFind Query

You must have the appropriate access rights to create and manage queries.

1. From the Workforce Timekeeper navigation bar, select **Common Setup > HyperFind Queries**.

2. To create a new query, select New from the menu.

3. Select a filter from the left side of the Select Conditions area and complete the corresponding page until the query is complete.

4. To add a condition to the query, click Add Condition. When finished, click Save As.

5. In the Save Query As dialog box, select the type of query from the Visibility section: Ad Hoc, Personal, or Public. If selecting a Personal or Public query, enter the name (up to 30 characters) and description (up to 250 characters) and click OK.

6. If necessary, click Assemble Query to combine the conditions in a way that performs the search you want.

7. Click View Query to review the query.

8. Click the Test button to ensure that the query is correct.

People Editor

If you have the appropriate access rights, you can view, add, or edit attributes for people with the People Editor. To access employee records in the People Editor, select a person from one of the Workforce Genies or Timecard and click the People icon. To enter information for a new person, select **Common Setup** > **New Person** from the navigation bar.

You access applicable information about the person selected through a number of categories that are organized into two tabbed areas:

- Person tab
- Job Assignment tab

Person

Depending on your access profile and the Workforce Central licenses that your company has purchased, you authorize and license the following types of users in the Person tab:

- **Workforce Timekeeper Employee**—This person typically enters his or her time at a Timekeeper terminal and not in the Workforce Timekeeper Web interface. Time and accrual information for this person, however, is tracked in the Workforce Timekeeper system.
- **Workforce Employee**—This person tracks his or her time in the Workforce Timekeeper Web interface. You must first enter the person as a Workforce Timekeeper Employee.
- **Workforce Manager**—This person uses information needed for tracking and maintaining other people's time.

If you purchased additional optional applications, such as Workforce Scheduler, you also assign these licenses to users in this workspace.

Depending on the type of license assigned, you can enter information into the several categories:

- **General Information**—Enter general employee information such as first and last name, ID, birth date, and primary labor account.
- **Skills and Certification**—Specify job skills and certification.
- **Leave Management**—Assign the accrual profile for prorated accruals by indicating

the person's full-time equivalency that is associated with your company's accrual policy.

- **User Information**—Enter the person's user name and password. Also enter the logon profile and user account status.
- **Contacts**—Enter employee contact information, such as home address, home and work telephone numbers, and e-mail address.
- **Additional Information**—Enter information according to the needs of your company.
- **Person's Dates**—Enter person-specific dates.

Job Assignment

You define what and where a person can work in the Job Assignment tab:

- **Primary organizational job**—the main job that an employee works
- **Schedule job list**—the organizational job(s) to which an employee can be scheduled to work
- **Job transfer set**—the organizational jobs to which an employee can transfer
- **Pay rule**, **wage rule**, **wage profile**
- **Effective date**

Depending on the type of license assigned, you may see some or all of the following categories of information

- **Job Assignment Summary**—The system summarizes the person's information here.
- **Primary Account**—Enter the employee's primary (or home) job, primary labor account, effective date, time zone, and seniority information.
- **Timekeeper**—Assign pay rule, wage profile, schedule group, device group, and identifying badge number information to users.
- **Personal Overtime**—Customize overtime rules for a specific person.
- **Scheduler**—Specify schedule group and rule set.
- **Access Profiles—**Specify function access and display profiles:
  - **Function Access Profile**—Determines what this person can see and do when logged on to the Workforce Timekeeper system.

- **Display Profile**—Determines the date, time, and labor account display as well as whether this person can edit his or her time-card in the future or access Genies.

• **Manager Role - General—**Identifies the ways that the selected manager can view and use the system as well as the people and labor accounts that he or she can view or manage

- **Employee Group**—Identifies a labor level set that determines which employees a manager can access

- **Labor Level Transfer Set**—Determines the labor levels and associated entries to which the manager can access

- **Pay Codes Profile**—Determines the pay codes that the manager can access in the timecard

- **Work Rule Profile**—Determines the work rules to which the manager can access

- **Reports Profile**—Determines the reports that the manager can access

- **Organization Group**—Identifies the subset of the organization's map that displays the locations and job that the manager oversees or schedules

- **Job Transfer Set**—Lists organizational jobs that the manager can use to transfer employees to other locations and jobs.

• **Manager Role - Scheduler—**Identifies Scheduler information for managers, specifically:

- Schedule group profile

- Shift template profile

- Pattern template profile

- Availability template profile

• **Employee Role**—Identifies the selected employee's function access and display profiles. These profiles determine the ways that the employee can view and use the system as well as the people and labor accounts that he or she can access. Depending on the type of license selected, enter the following information:

- **Labor Level Transfer Set**—Determines the labor levels and associated entries to which this person can charge time

- **Time Entry Method**—Identifies how this person enters time: Time Stamp, Hourly Timecard, Time Stamp and Hourly Time-card, or Project Timecard

- **Pay Codes Profile**—Determines the pay codes that this person can access in the timecard

    – **Work Rule Profile**—Determines the work rules to which this person can charge time

    – **Job Transfer Set—**Lists organizational jobs for transfer purposes. The employee job transfer set includes an employee's primary job. Employees use the transfer set to transfer themselves to other jobs.

Adding People

To add a new person with the People Editor:

1. Select **Common Setup** > **New Person** on the navigation bar. The Licenses section of the People Editor opens.

2. Select the type of license that this person will use. Different options appear on the left side of the workspace, depending on the type of license that you select.

3. Select each category, one at a time, from the list on the left side of the workspace and enter the appropriate information in the right side of the workspace. Click Save before moving to the next category in the list.

    The first time that you save your entries, a Summary category appears at the top of the list. The system continues to update this summary information each time you save your edits. You cannot edit the summary information directly

Viewing or Editing People Records

To access employee records in the People Editor:

1. Select a person or group of people from one of the Workforce Genies or Timecard and click the People icon.

2. In the People Editor workspace, make the necessary changes and click Save when finished. The changes take effect immediately:

Scheduling Employees

Scheduling employees in Workforce Timekeeper provides many benefits to managers; for example, you can:

- Pay your employees from their schedule, which can include account transfers. This is especially useful if your employees are not punching in at a device.
- Track exceptions. For example, the system can compare punches to a schedule and highlight the instances when someone punches in early or late.
- Manage leave time. For example, the system keeps track of the number of vacation hours scheduled in a given week so that you can maintain adequate coverage and ensure that your employees are adhering to organizational policies.

Workforce Timekeeper provides standard scheduling tools so that you can:

- Build schedules for employees
- View schedules for the employees and time period you select
- Adjust schedules as needed

These scheduling tools work well when employees work predictable schedules and there is no concern for variations in how many employees are required to work at a particular time. An organization that runs three shifts, with employees hired to work a specific shift, will find these tools to be useful.

The optional Workforce Scheduler™ application provides tools for more complex scheduling where requirements vary depending on business demand. If you have this product, you can find details in the *Workforce Scheduler User's Guide*.

Scheduler Concepts

Scheduling in Workforce Timekeeper uses the following concepts:

- **Shift**—A span of time with a start time and an end time, usually in the same day; for example, 7 A.M. to 3:30 P.M.
  Shifts can be divided into segments, which can contain any of the following:
  - **Regular**—Work time charged to the primary account (default).
  - **Break**—Nonworking time, such as meals.
  - **Transfer**—Time in a different job, labor account, and/or work rule.

- **Off**—Time associated with a work rule, such as when employees are scheduled to be on call, and the amount that they are paid depends on whether or not they are called in.

- **Unavailable**—Time that cannot be scheduled for work.

- In place of, or in addition to, a shift in a schedule, you can schedule planned leave time using *pay codes*, such as vacation or sick. Or if you use flexitime targets, you can insert *accrual amounts*. (See the on-line Help for flexitime details and procedures.)

• **Pattern**—One or more shifts, pay codes, or both that repeat over specific days or weeks; for example, 7 A.M.- 3:30 P.M., Monday through Friday.

You can create more complex patterns; for example, employees can be scheduled to work the morning shift for two consecutive weeks and then the evening shift for one week. At the end of the third week, the pattern repeats.

If you use flexitime, you can create accrual amount patterns.

• **Shift Template**—A shift that is saved with a name but no date so that it can be reused as needed. Shift templates save time if you have employees who work standard shifts. Shift templates are created in **Scheduler Setup > Shift Templates** on the navigation bar.

• **Pattern Template**—A pattern that is saved with a name but no date so that it can be reused as needed. Pattern templates save time if you have people who work standard patterns and you tend to edit schedules at the individual level. Pattern templates are created in **Scheduler Setup > Pattern Templates** on the navigation bar.

• **Schedule Group**—When a number of employees have similar working characteristics, you can group them into a named Schedule Group. You can select all the employees in the group and assign them the same schedule. When you need to make changes such as adding a shift or replacing or extending the time of an existing shift, you can select all of the employees in the group or select some of the employees in the group and make changes in a single operation.

• **Schedule Period**—The amount of time that your schedule covers, and the amount of time loaded into the Schedule Editor for Current, Next, and Previous Time Period; for example, two weeks. Schedule periods are defined in **Setup > Schedule Periods** on the navigation bar. They are then assigned to Display Profiles in Workforce Central Setup.

• **Job**—Level in an organization that is scheduled. Each job is combined with a location in the organization, such as Maternity,

Front End, or Line 23, to define the job assignment. You can transfer employees to a different job in Timecard or Scheduler. Note that jobs must be configured in Setup before you can use them in scheduling.

Schedule Views

You can display the schedule for some or all of your employees, or for one employee at a time. In the Schedule Editor, you select which employees' schedules to view using a query in Show. The system loads these schedules for the Time Period that you select.

You can scroll horizontally to view any dates that do not fit into the view. To view dates that are not loaded, change the Time Period.

Schedule Editor

The Schedule Editor displays schedules in tabular or graphical format. You can view the schedule for one week or for up to 28 days at a time.

To access the Schedule Editor, select Schedule Editor from the navigation bar.

Daily magnification shows seven days or more of scheduled shifts in a tabular format. Shifts can be displayed with start and end times or with shift labels, such as 7A8 for 7 A.M. to 3:30 P.M., E6 for the six hour evening shift, and so on. Shift labels save space so that you see more days of the schedule at one time.

The 4-hour and 1-hour magnification views show scheduled shifts in a multicolored graphical format so that you can easily see whether you

have the appropriate coverage. Shifts, patterns, and pay codes each appear in a different color; for example, pay codes are yellow.

- To switch between shift start and end times and shift labels, select **View > Shift Labels**. To switch back to shift start and end times, select **View > Shift Times**.
- To change the schedule magnification, use the View menu to select Daily, 4-hour intervals, or 1-hour intervals.
- To view the maximum number of days in the schedule, toggle to shift labels in Daily view, and minimize the navigation bar. Drag down to minimize the Comments tab. You can set your display preferences to have the Schedule Editor always open in this view.

Schedule Outline

Schedule Outline displays schedule details for one employee at a time. To see an employee's schedule details, select the employee's name, and select **View > Schedule Outline**

Transfer Indicators

Codes next to the shift times or shift label provide information about the shift. When you display the schedule by shift start and end times, codes appear in the cell with the shift times. To see transfer indicators when you display the schedule by shift label, hold the mouse over the shift.

Code	Indicates
(x)	Transfer (labor account only)
shift in italic text	The location in which the shift is worked is not loaded and the shift does not count toward your coverage.
shaded shifts	If an employee has transferred into your location from another location, that employee's schedule appears in your view. Shifts in the schedule that are not scheduled in your location are shaded, and you cannot edit them.
	If any of your employees have transferred out of your location, those shifts are also shaded, and you cannot edit them.
(*work rule*)	Work rule transfer
(o)	Off day (labor account transfer)
(u)	Unavailable

Comments for Shifts and Pay Codes

If the shift or pay code has a comment associated with it, a small yellow square appears in the cell. The text for comments is displayed on the Comments tab at the bottom of the Schedule Editor, as well as in the Shift Editor or Pay Code Editor for that shift or pay code.

Building Schedules

The Scheduler provides several ways to build schedules, including:

- Enter the shift start and end time directly into a date cell in the Schedule Editor.
- Use the Shift Editor or Pay Code Editor to enter shifts and pay codes one at a time.
- If you use standard shifts and patterns, use the Shift Editor, Pay Code Editor, or Pattern Editor to enter a shift template or pattern template.
- If you use flexitime, you can use the Accrual Editor or Accrual Pattern Editor to enter accrual amounts.

Note: To access scheduling functions, use the menu options. Or you can right-click on a date cell or employee name. The associated shortcut menu appears, and you can select a scheduling function.

Creating Shifts for an Individual

You can build simple or complex shifts for an individual, one day at a time.

Creating Simple Shifts

The easiest way to create a simple, regular shift is to type the start time and end time into a date cell for an employee.

Use the format 8 - 4p or 1130 - 530p. Because A.M. is the default, you do not need to enter a letter for A.M. times.

Copying Shifts Into a Cell

You can copy and paste shifts and their attributes from one cell to another using Copy and Paste on the Actions menu.

Inserting a Shift Template

To insert a shift template, select the date cell where you want the shift, and select **Shift > Insert Template**. Select the shift template from the list and click OK.

You can also type the name of the shift template into the date cell. The shift template name becomes the shift label.

If you want to edit a shift created from a template, highlight the shift in the Schedule Editor and select **Shift > Edit**. Edits to the scheduled shift do not affect the shift template.

Using the Shift Editor

To create a more complex shift, use the Shift Editor.

1. In the Schedule Editor, click the date cell in the row of the employee for whom you want to add or edit a shift.

2. Select **Shift > Add**.

3. The shift type cell defaults to Regular. To change the shift type, click in the Type cell and select the shift type that you want.

4. Click in the Start Time cell and enter the start time for the segment.

   Note: You can type 630 and the system will enter 6:30a for 6:30 A.M. For P.M. times, enter 630p.

5. In the End Time cell, enter the end time for the segment and press Tab. The total number of hours scheduled appears in the Hrs cell.

6. If the End Date is different from the Start Date (for example, if the shift crosses midnight), edit the End Date for the shift. The Hrs total changes accordingly.

7. If you are scheduling a job, labor account, or work rule transfer, click the Transfer cell. Select an entry from the list of recent transfers, or select Search (see "Entering a Transfer" on page 63 for more details).

8. Repeat from step 3 for each segment in the shift.

   • To add a new row below the selected row, click the Add Row arrow icon.

   • To delete the highlighted row, click the eraser icon.

9. Optionally, you can add a comment to the shift; click the down arrow in the Comments area and select a comment.

10. Optionally, enter a Shift Label. This label appears instead of shift start and end times when you select **View > Shift Labels**.

11. Optionally, you can have this shift repeat for consecutive days. Specify the number of days in the **Number of Days** text box.

12. To close the Shift Editor, click OK.

13. To save the shift in the schedule, select Save in the Schedule Editor.

14. After you have saved a shift, you can use Copy and Paste to copy shifts and their attributes to other cells.

Creating Schedule Patterns for an Individual

To create a schedule pattern for an employee, use the Pattern Editor described in this procedure.

1. In the Schedule Editor, click the name of the individual for whom you are creating a pattern.

2. Select **Shift > Add Pattern**. The Pattern Editor opens for the employee and the date that you selected.

3. In Work Start Date, enter the date on which the employee starts working this pattern.

4. Optionally, you can enter the date on which the pattern starts in Pattern Start Date. The default Pattern Start Date is the date on which the pattern originally started.

   For example, if the Pattern Start Date is 02/04/2002, and that date was a Monday, then the first active cell in the schedule grid is a

Monday. If you change the Pattern Start Date to 02/05/2002, the first active cell in the schedule grid changes to Tuesday.

The Pattern Start Date may be different from the date on which the employee starts working the pattern.

5. Do one of the following:
   - In End Date, enter the date on which the employee stops working this pattern.
   - Select Forever to have the pattern repeat until otherwise indicated.

6. In the Recurring box, select the number of days or weeks in the pattern. Select Weeks or Days as appropriate.

7. Create a pattern using one of the following methods:

   Enter shifts manually: Click in the date cell and type the shift start time and end time using the format 8 - 4p or 1130 - 530p.

   Insert a shift into one or more cells:

   a. Select the cells into which you are copying the same shift. To select more than one cell, hold down Ctrl and click the cells.

   b. Enter the shift into the selected cells using either of the following methods:

      - Click Insert Shift, select a shift from the list, then click OK.

      - Click Shift Editor and create a shift in the Shift Editor.

   Insert a pattern:

   a. Click Insert Pattern and select a pattern from the list.

   b. Make any edits to the pattern, and click OK.

8. When you are finished, click OK.

9. Select Save in the Schedule Editor.

Creating a Temporary Change to a Schedule

You can make a change to a schedule for an individual that will last for a specific length of time. For example, you can schedule overtime on Mondays and Wednesdays for the month of August. At the end of the specified time, the original schedule automatically takes effect again.

Scheduled pay codes are not overwritten by the temporary schedule.

To create a temporary change to a schedule:

1. In the Schedule Editor, click the name of the individual who has the schedule pattern for which you need to make a temporary change.

2. Select **Shift > Edit Pattern**. The Pattern Editor opens for the employee that you selected.

3. In the Work Start Date, enter the date on which you want the change to take effect.

4. In the End Date, enter the date on which you want the change to end. On the next day, the original pattern will start again.

5. Select Override other patterns. This ensures that only your changed shifts are scheduled during the time that you specify.

6. Make your edits to the pattern. You can enter a new pattern or edit the cells of the current pattern.

7. When you are finished, click OK.

8. Select Save in the Schedule Editor.

Entering Planned Leave Time

To enter a pay code for planned leave time, such as vacation, sick, or maternity leave:

1. In the Schedule Editor, select the date cell into which you are entering leave time.

2. Select **Pay Code** > **Add**. The Pay Code Editor opens for the employee and date that you selected.

    Note that if you defined pay code patterns for standard events such as maternity leave, you can select **Pay Code > Add Pattern** and assign a pattern using the Pattern Editor.

3. Click Pay Code and select a pay code from the list.

Depending on the pay code that you select, the next field is Amount (hh:mm) or Amount ($).

4. In Amount, enter the number of hours and minutes or the amount of money accrued by the employee for the pay code.

5. In Display Start Time, enter the time at which you want the pay code's colored block to begin in the graphical view. This is usually the time at which the employee's normal shift would begin.

6. If the date for the pay code is not the date that you selected in Schedule Editor, edit the Effective Date.

7. If the pay code involves a job, labor account, or work rule transfer, click Transfer. Select an entry from the list of recent transfers or click Search (see "Entering a Transfer" on page 63 for more details).

8. Optionally, you can add comments to the pay code; click the down arrow in the Comments area and select a comment.

9. If the pay code is replacing all or part of a shift (for example, when the employee is sick), select Override Shift. To replace the entire shift, choose Whole Shift. To replace a portion of the shift, choose Partial Shift. This will insert a new segment into the existing shift.

    If the pay code is in addition to the shift, for example, when you are paying a bonus or scheduling an on-call shift, leave the Override shift box clear.

10. When finished, click OK.

11. Select Save in the Schedule Editor.

Entering a Transfer

When you create shifts and patterns, and when you assign pay codes, you can enter a transfer to a different job or location, labor account, or work rule.

Use a *labor account transfer* if an employee's shift segment should be charged to an account other than the primary account.

Use a *job transfer* if the employee is working a different job than their primary job. The time is automatically charged to the labor account that was configured for that job.

If you use organizational maps, you can assign a job transfer to a different location than the one in which the employee normally works. Time is automatically charged to the appropriate labor account.

When you create shifts, you can also add a *work rule transfer*; for example when an employee transfers to a job for which the pay is different.

To enter a transfer:

1. In Shift Editor or Pay Code Editor, click Transfer.

   For a labor account transfer, you can select a labor account from a list of previously created labor accounts, or you can select Search to create a labor account to transfer to.

   For a job or work rule transfer, select Search.

   • If you select a labor account from the list, you are finished.

   • If you select Search, the Select Transfer dialog box opens. Follow from step 2 to create the transfer:

2. You can transfer an employee to a different job (if you use organizational maps), labor account, and/or work rule.

   If you enter a job transfer, the correct labor account is automatically charged and you do not have to enter a labor account transfer in addition.

If you enter a job transfer *and* a labor account transfer, the labor account data overwrites the job transfer data (see the on-line Help for more details).

Transfer Type	Action
Job or location	In the Job area: • Click the plus sign (+) next to each location in the hierarchy until you see the job that you want. Click the box next to the job so that a check appears. • Or, if you know the job path, you can type it in Go To and click Show.
Labor account	In the Labor Account area: 1. Click an option button to select the highest labor level in the list of labor levels that you need in order to define the labor account. You do not have to start at the highest level. The Available Entries area on the left lists the choices for the labor account that you select. 2. Select the entry that you want from the Available Entries on your left. Your selection is entered into the table on the right. 3. Continue to select entries for the labor levels that you are including until the labor account is defined. It is acceptable to leave some labor levels blank, because the primary labor account is used for the blank levels.
Work rule	In the Work Rule area, select a work rule from the drop down box in the Work Rule area. Note that the complete path name displays at the bottom of the screen.

3. When you are finished, click OK to close the Select Transfer dialog box.
4. Complete the Shift Editor dialog box, and click OK.
5. Select Save in the Schedule Editor.

Schedule Groups

When a number of employees have similar working characteristics, you can group them into a named Schedule Group. You can select all the employees in the group and assign them the same schedule. When you need to make changes, such as adding a shift or replacing or extending the time of an existing shift, you can select all of the employees in the group or select some of the employees in the group and make changes in a single operation.

Employees can belong to many groups at the same time. Shifts are assigned to individual employees; not to the group. You can make changes to one or more employee schedules without affecting the whole group.

Viewing Schedule Groups

The Schedule Group Roll-up item on the navigation bar gives you an easy way to make changes that will affect the entire group.

The Schedule Group Multi-Line item on the navigation bar gives you an easy way to select members of a group so you can make changes.

Creating a Schedule Group

To create a schedule group, first add a group in Scheduler Setup. Then, assign employees to the group from any detail Genie.

1. To add a new group:
   a. Select **Scheduler Setup > Groups** from the navigation bar. The list of current groups appears.
   b. Select **New** from the menu bar.
   c. In Group Name, enter a unique name for the group.
   d. To save the group name, click **Save & Return**. To quit without creating the new group, click **Return**.
2. To assign employees to a group:
   a. From a detail Genie, such as QuickFind, select the names of the employees whom you are adding to the schedule group.
   b. Select **Schedule > Add to Group** from the menu bar. The Add to Group dialog box appears.
   c. In Start Date, enter the date on which the group assignment begins for the selected employees.

d. In End Date, enter the date on which the group assignment ends for the selected employees.

e. To save the group assignment, click **OK**.

Creating a Schedule for Group Members

Schedules are associated with employees, not with the group as a whole. You can create schedules and have them apply across entire groups, but each schedule resides with each employee. Depending on your needs, you can chose one of the following ways to create schedules for group members:

- **For selected group members or for individual schedules**—Select the names of members from the Schedule Editor or from any detail Genie, such as the Schedule Group Multi-Line Genie. You can add shifts, pay codes, and transfers that apply to all selected employees.
- **For all members of a group**—Select the group name from the Schedule Group Roll-up Genie. You can add shifts, pay codes, and transfers that apply to everyone in the group.

To create schedules for multiple employees or for entire groups, proceed as follows:

1. To create schedules for multiple employees,
In the Schedule Group Multi-Line, or any detail Genie such as QuickFind, select the members of the group to which you are assigning the schedule.

   To create a schedule for an entire group,
From the navigation bar, select **Scheduler > Schedule Group Roll-Up**. The Schedule Group Roll-Up workspace appears. Select the name of the group that you want from the list.

2. From the menu bar, select **Schedule**. You can do any of the following from the drop-down menu:
   - Add Shift
   - Add Pattern
   - Add Pay Code

3. When the schedule edits are complete, you can check the status in Group Edit Results.

Modifying a Schedule for a Group of Employees

You can make any of the following schedule modifications to any number of employees in the group, from one to the entire group. You can also make these modifications to any number of employees regardless of thier membership (or non-membership) in a group.

- Add individual shifts.
- Add schedule patterns.
- Replace a shift For example: schedule all day-shift employees to come in one hour later and stay one hour later. For the selected employees, the system searches for any shift with the start time and end time that you define. The new shift replaces the old shift on the date that is specified for the new shift.
- Enter a Transfer. For example: move all employees to a different work area. You can insert a transfer into an existing shift or shifts for the selected employees. The system inserts the transfer into all the shift segments that contain the transfer start time, and that are scheduled on the Effective Date for the transfer. If the transfer time is at the beginning of a shift segment, the segment is replaced with the transfer.
- Append time to the start or end of a shift. For example: add an hour to the beginning of all first shifts for safety training. You can modify the start time or end time of shifts that fall on the effective date you enter for the employees you select. Optionally, you can add a transfer to the appended segment.

Follow these steps:

1. In your Schedule Group Multi-Line Genie, or any detail Genie such as QuickFind, select the employees whose schedule you are modifying.
2. From the menu bar, select the modification from the **Schedule** menu. The appropriate workspace appears.
3. Enter the data to define the modification.
4. Click **OK**.

When you are finished, you can check the status in Group Edit Results.

Generating Reports

The Reports component, which is accessed from the Workforce Timekeeper navigation bar, enables users to select and run an existing report. The report can be a standard report or a previously created custom report.

When you run a report, the system extracts data from the database and formats it in rows and columns as a report. According to your access rights, the following links might appear on your navigation bar:

- **My Reports**—Three reports provide your accrual balances and projections, schedule, and time detail.
- **Reports**—More than 40 standard management reports provide a wide range of information, such as hours by labor account, punch origins, and absent employees.
- **Report Setup**—These tools provide settings to configure custom reports.

The Reports component provides a full complement of standard reports, all of which are sorted into nine categories:

- All
- Accruals
- Configuration
- Data Collection
- Detail Genie
- Import
- Roll-Up Genie
- Scheduler
- Timecard

Every report available appears in the All category. When you select a report, a description of the selected report appears in the adjacent pane. You can also reassign reports to other categories or create custom reports that contain only the data you need.

After selecting a report, you can:

- Run and preview the report
- Print or e-mail the report immediately
- Schedule when to print or e-mail the report

Running a Report

You can run a report in either of two ways:

- Select Reports from the navigation bar.
- Select the Reports launch button from another Workforce Time-keeper component such as from a Genie or a timecard.

Using the Navigation Bar to Run a Report

To run a report using the navigation bar:

1. Select Reports from the navigation bar.

2. In the Categories list, select a report.

3. Click the Show drop-down arrow to select a previously created HyperFind query.

4. To view or change the query, click Edit, which opens the Hyper-Find component. On the HyperFind page, you can view the details of the query or edit the query. When finished, click the browser Back button to return to the Reports workspace.

5. If the Specific Date dialog box opens, enter or select a date using the same format that appears in the dialog box and click OK.

6. To change the time period, click the Time Period drop-down arrow and select the new time period.

7. To change the report options, select a report, then select Set Options. You can set the following options:

   - **Specific report options**—Report options allow the report to filter on additional parameters beyond HyperFind or People so that you see only the data that you want in a report. Options that you can set differ for each report. For example, the ability to select certain exceptions to appear on a report is accomplished by using the Exceptions Report Option with the Exception Report.

     Available options appear in the Options list with the corresponding selections in the Details section. Refer to the list of reports to review the details of each report.

- **E-mail Format**—Adobe Acrobat is the default file format for reports. If you are going to e-mail a report, you can change the file format to Hypertext Markup Language (HTML), Microsoft Excel Document, Microsoft Word Document, or Rich Text Format. You cannot change the report format if you are going to view or print the report.

8. From the Select Reports menu, select Run Report.

Note: Standard reports are optimized for PDF format. If you choose to print in another format, you may need to create a custom version of the standard report so that the data is properly formatted.

Using Reports Launch to Run a Report

The following example shows how to run a report using the Reports launch that displays people in your group with unexcused absences:

1. From the navigation bar, select **My Genies** > **Reconcile Timecard**.

2. In the Reconcile Timecard workspace, select a Time Period and the employees who show unexcused absences, then click the Reports launch button.

The Reports workspace opens. Previously Selected Employee(s) and Yesterday appear as selections:

3. Click the Select Report tab and select the type of report.

4. If applicable, click the Set Options tab and enter report options such as specific pay codes to appear on the Employee Hours by Labor Account report or type of exceptions to appear on the Exception report.

5. Select Run Report from the Select Report menu.

6. Click the Check Run Status tab to monitor the status of the report, for example, "Waiting," "Running," or "Complete." Periodically click Refresh Status to update the status.

7. When the report finishes processing, select **Check Run Status** > **View Report**.

Creating Custom Reports

The Report Setup component under Common Setup on the navigation bar in combination with Crystal Reports software enables you to create custom reports. After you create a report, it can be made available to general users through the Reports selection on the navigation bar.

With the Report Setup capability, you can:

- Create custom report options
- View the configuration of existing reports
- Change the categories to which existing reports are assigned
- Duplicate existing report items and save them with different settings
- Create new report items that reference report definition files that you write

You will only see the custom reports that you generate unless you have additional access rights.

Printing a Report

To print a report directly to a printer after the report has been generated:

1. Select a report from the Categories list.

2. From the Select Reports menu, select Send to Printer.

3. In the Send to Printer dialog box, select a printer and click OK.

Scheduling a Report

To select a report to be printed or e-mailed according to a schedule:

1. Select Reports from the navigation bar.

2. Select a report from the Categories list.

3. From the Select Reports menu, select Schedule, which opens the Event Manager component.

4. In the Event Output section of the Event Manager, select a printer or enter an e-mail address. If you do not select either output, the report will simply appear in the Check Run Status window after it is generated.

5. In the Event Schedule section, click the arrow in the drop-down Schedule Type list box and select from hourly, daily, weekly, monthly, once, or now. The Event Section workspace adapts to your selection.

6. Set the Start and End dates using the calendar.

7. Click Save.

See "Event Manager" on page 74 for more information about Event Manager.

Event Manager

New | Duplicate | Save | Reload | Properties | Run | Enable | Disable | Delete | Print Screen... |

Scheduled Events:

Name	User	Status	Schedule
Hours by Labor Account for Betty...	Richie, Betty	Enabled	Weekly; Begin:5/21/2001...
Time Detail for Christy Fryman fo...	Fryman, Christy	Enabled	Weekly; Begin:5/21/2001...
Shift Builder	SUPERUSER	Enabled	Weekly; Begin:1/12/2001...

With Event Manager, you can run:

- A report that is scheduled to run at specified intervals.
- An import of data from another source, scheduled to run at specified intervals.
- Several reports scheduled to run sequentially at specified intervals or any executable program.
- A shift builder process that automatically stamps out defined shift patterns based on the patterns created in the Workforce Genies for Scheduling.

With the appropriate access rights, managers and administrators are usually the only users with access rights to create and add events.

- System administrators can access all events and Event Manager capabilities.
- Managers have access only to the prescheduled events assigned to them by their system administrator and the specific events they add. Managers have limited access to Event Manager's capabilities.

Contact your Workforce Timekeeper administrator for your company's policies. You can create a scheduled event in any of the following ways:

- Create a single event from Reports or Import components. This option is the recommended path to schedule reports or import batches respectively since the selected report or import batch will default as the scheduled event.
- Create a new Batch event. (Only system administrators can create batch events.)
- Create a new event by changing the parameters of an existing event in the event list.

Once created, all events remain in the event list until someone deletes them. Reaching a specified end date does not automatically delete the event from the list.

Workforce Record Manager

The Kronos® Workforce Record Manager™ component of Workforce Timekeeper enables infrequently used data to be removed from your company's production database and placed in an archive database. Archiving infrequently used data minimizes the amount of disk space and maintenance required to keep your Workforce Timekeeper production system running smoothly.

Archiving data does not impact access to Workforce Timekeeper. When Workforce Record Manager processes are running:

- The production database is always accessible.
- Users with the appropriate rights can always access data being archived, either from the production or archive database.

Accessing Archived Data

If you try to access data that is no longer in the production database, a message appears informing you that the information does not exist. To access archived data using Workforce Record Manager:

1. End your current process.
2. Select the Record Locator from the navigation bar.

The Record Locator workspace identifies:

- The date range of the data in each archive database.
- The URL of the Workforce Timekeeper application server that connects to each archive database; there will be more than one URL if you have more than one archive database.

3. Select the URL that points to the data that you want to access.
4. When the Workforce Timekeeper logon appears, enter the appropriate user name and password to access the archive database. The user name, ArchivePayroll, is set up during installation of Workforce Record Manager. See your Workforce Timekeeper administrator for specific information.

After you log on, you are looking at the data in the archive database. It looks similar to the data in the production database. However, if you have

logged on as ArchivePayroll (the recommended user name), the view of the data may look different from your view of the data on your production database. For example, you may see different Workforce Genies.

When you finish using the archive database and want to return to the production database:

- Click Logoff on the navigation bar to end your session with the archive database.

- When the "You are now logged off" box opens, log back onto the Workforce Timekeeper production database using your user name and password.

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User Name: [   ]

Password: [   ]

[Log On]

You are now logged off.

Running Reports

If you need to run a single report in Workforce Timekeeper, all of the data for that report must be in a single database. This means that if you have 2002 data on your production database and 2001 data on your archive database, you cannot generate a single report that covers the time span of November 2001 to March 2002.

When you need to run a single report, copy all the data needed for the report to the archive database. For example, copy January to March 2002 from the production database to the archive database that holds the 2001 data. Then, generate a report for November 2001 to March 2002 on the archive database.

In deciding how to store data needed for reports, consider the typical time span that your company requires for reports and how frequently you need to produce such reports. If you need to generate single reports frequently, you will probably want the data for those years to be in one database.

For more information, refer to the *Workforce Record Manager User's Guide.*

Using the Tasks Feature

If your company has automated processing of common work and administrative tasks, your navigation bar has an Inbox that contains two tabs: Tasks and Messages. Workforce Central employees and managers can initiate a process using the Actions list. You use your Tasks list to respond to tasks that have been assigned to you in a particular process. For more about the Actions list, see "Using the Actions Feature" on page 80. You may also receive messages about a task on the Messages tab. For more about the Messages tab, see "Using the Kronos Messaging System" on page 78.

To view your Tasks list, click **Inbox > Tasks** in the vertical Workforce Central navigation bar on the left.

Completing an Assigned Task

To complete a task that is assigned to you:

1. Select the task that you want to complete.
2. Click **Edit ...** and then fill out the form.
3. Click **Save & Close** to submit the form and complete the task.

Reassigning an Assigned Task

To reassign a task that is assigned to you to someone else:

1. Select the assigned task that you want to reassign to someone else.
2. Click **Reassign**.
3. In the New Resource drop-down list, select the person that you want to reassign the task to.
4. Click **Save & Close**.

Using the Kronos Messaging System

The Kronos messaging system enables people and processes in your organization to communicate information in a timely, effective manner using electronic messages and notifications.

To open and read messages within Workforce Central:

- In the vertical Workforce Central navigation bar on the left, click **Inbox > Messages**.
- At the top of your Timecard window, click **Inbox**.

Opening Messages

To open a message, select the message from the list and then click **Open** on the Messaging menu bar, or double-click on the message.

Sending Messages

To send a new message:

1. Click **New** on the Messaging menu bar. The New Message dialog box appears.
2. Click the **Address Book** button and then use the address book to add names of the people that you want to receive the message. Or, enter the address in the To text box and click the **Check Name** button to verify that the names that you entered are valid.
3. Enter text in the Subject field and Message fields.
4. If you want to receive a copy of your message, select the corresponding check box.
5. Click the **Send** button.

Replying to Messages

To reply to a message in your Inbox:

1. Select a message from the list and then click **Reply** on the Messaging menu bar. The Reply Message dialog box appears.
2. To add more names to the reply, click the **Address Book** button and then use the address book. Or, enter the address in the To text box and click the **Check Name** button to verify that the names that you entered are valid.

3. If you want to receive a copy of your reply, select the corresponding check box.

4. Enter your reply and then click the **Send** button.

Note: You cannot reply to system notifications or to messages (from the Messaging system) that you receive in your corporate e-mail system.

Deleting Messages

To delete a message, select the message from the list and then click **Delete** on the Messaging menu bar.

Printing Messages

To print a message:

1. Select the message from the list.

2. Click **Open** on the Messaging menu bar. A separate dialog box appears in the window.

3. Click the **Print** button.

Using the Actions Feature

If your system displays an Actions list, you can submit forms that enable you to initiate tasks such as:

- Requesting time off or canceling previously scheduled time off
- Registering for training
- Requesting scheduling changes (shift swaps, shift sign-up, and coverage)

Depending on your system configuration, you can view your Actions list in the following ways:

- In the vertical Workforce Central navigation bar on the left, click **My Information > My Actions**.
- In your Workforce Central self-service window, click **My Actions**.
- If you are a manager, click **Actions** to initiate business processes that you have access to.
  Use the Categories drop-down list to select which Actions you want to view.

To submit a form:

1. In the list that is displayed in the My Actions or Actions work area, click the type of request, or action.
2. In the process request form, enter the required information.
3. Click the **Save & Close** button to submit the request.

Bidding for Vacation

Depending on your system configuration, you may have access to the vacation bidding feature, which automates vacation bidding activities:

- Managers use the Bid Editor to send online bid requests to their employees for available vacations. Managers approve or reject the resulting online bids submitted by the employees. Managers post approved bids to the employee's schedule.
  To view the Bid Editor, click **Bid Editor**. For more informaiton about the Bid Editor, see the online Help.

- Employees receive notifications in their messaging Inbox or their external e-mail (or both) about the bid requests. They then use My Bids to submit their bids for vacations.
  To view the My Bids list, click **My Bids**: If you do not see My Bids, it means that you do not have any bids to bid on.

Vacation bid requests arrive in the **Inbox > Messages** tab. If you want to bid, you submit your bids (or decline to bid) using the My Bids list during the specified time period. When the bid period expires, you will receive notification in the **Inbox > Messages** tab whether you have won the bid, that is, were granted the vacation. For more about the Messages tab, see "Using the Kronos Messaging System" on page 78.

Viewing Your Bids

In the My Bids window, use the drop-down list in the Posted Filter field to restrict which bid requests appear in the list:

- All — Displays all bid requests
- Yes — Displays only the bid requests for which you submitted bids that have been approved and posted to the schedule
- No — Displays only the bid requests that you did not respond to yet or that have bids still waiting for approval and posting to the schedule

The columns in the list provide the following information about each bid request:

Column	Description
Name	The name the manager assigned to the bid request
Description	A brief description of the bid request
CreatedBy	The manager who sent this bid request to you

Column	Description
Request Type	The type of bid request: vacation
Bidding Opens	The date when you can begin submitting bids
Bidding Closes	The last date when you can submit bids
Bidding Period Start	The start date for the time period that you can bid for
Bidding Period End	The end date for the time period that you can bid for
Posted	Whether your bid was approved and posted to the schedule (Yes or No)

Editing and Submitting a Bid

When you receive a bid request, you use the My Bids feature to complete the required information and submit your bids.

After you submit your bids, you can later edit them and submit changes up until the Bidding Closes date.

Note: The priority, or rank, of your bids is determined by the order in which you enter them in the My Bids area. The first row with a bid is ranked #1 in priority, the second row # 2, and so on, depending on the number of bids that you are allowed to submit.

To edit and submit a bid:

1. In the My Bids window, select a bid request.
2. Click **Edit**.
3. In the Start and End fields, enter the start and end dates for the period of time that your are bidding for. Use MM/DD/YYYY format.
4. In the Hours field, enter the number of hours per day for the days that comprise this time period.
5. If necessary, enter information in one or more notes fields.
6. If you want to submit only one bid, go to step 8.
7. If you want to add additional bids, click the green arrow in the left-most column to create a new line for each new bid and enter the information.

   Note that the value for **Maximum number of bids** determines how many additional lines of bids you can add.

8. If you want to remove a line of bids, click the eraser symbol next to the green arrow.

9. Check to make sure that the information for your bids is correct and that there are no blank lines of bids. Then, click **Save**. Your bids are sent to your manager. When your manager makes a decision about your bid, you will receive a notification in your Inbox or e-mail. If your bid is approved, the schedule will be updated as well.

Declining to Bid

To decline to bid on a bid request:

1. In the My Bids window, select the bid request.

2. Select the **Decline to bid** check box.

3. Click **Save**.

Delegating Authority

When a manager expects to be unavailable (for example, on vacation), a **delegate** can be authorized to perform the manager's tasks during the manager's absence.

Delegating authority involves the following steps:

1. **Setting up the environment**

    To enable a manager to authorize a delegate, the system administrator must perform the following setup tasks:

    a. Create a Delegate Data Access Profile that includes the name of the delegate (that is, the individual who will act in the manager's role).

    b. Assign the appropriate Delegate Data Access Profile to the manager, using the People Editor.

2. **Requesting an individual to act in a manager's role**

    After the setup steps have been completed, the manager does the following:

    a. Identify a delegate (who already is listed on the manager's Delegates Data Access Profile) who would be authorized to act in the manager's role.

    b. Specify a time period when that delegate would be authorized to act in the manager's role.

3. **Accepting a delegation request**

    After a manager has requested that an individual be a delegate (step 2), the designated delegate must accept (or decline) the request.

4. **Performing tasks as a delegate**

    After accepting a delegation request, the delegate can switch roles and perform the delegator's tasks during the delegation period.

Creating or modifying a Delegate Data Access Profile

To identify an individual as a potential delegate who would act in a manager's role during the manager's absence, the system administrator must include the delegate's name in a Delegates Data Access Profile. To create or modify a Delegates Data Access Profile, select **Setup > Common Setup > Delegate Profiles**.

You can do any of the following on this page:

- Create a new Delegate Data Access Profile by clicking **New**.
- Add or remove the names of potential delegates from an existing Delegate Data Access Profile by selecting the profile and clicking **Edit**.
- Duplicate an existing profile (which you can then edit) by selecting the profile and clicking **Duplicate**.
- Delete a profile by selecting the profile and clicking **Delete**.

To assign a Delegates Data Access Profile to a manager, use the Access Profile workspace in the People Editor.

A Delegates Data Access Profile can include as many names of potential delegates as you want. This lets you configure a delegate authority plan according to the needs of your site. For example, you could have an individual Delegates Data Access Profiles for each manager in your organization. Another option would be to list all of the managers in a particular organization in a single Delegates Data Access Profile, then assign that profile to each of the managers in the group.

Defining Role Profiles

A role profile is a set of functions or tasks that an individual might perform. Each role profile is associated with one Function Access Profile and one Display Profile. When delegating authority, a manager delegates authority for one specific role.

You create roles using the Role Profile Editor. You can access the Role Profile Editor by choosing **Setup > Common Setup > Role Profiles > New** from the navigation bar.

Role profiles are displayed on the Role Profile List.

Role Profile List

The role profile list displays the role profiles that can be selected for delegating authority. From the role profile list page (**Setup > Common Setup > Role Profiles**), do one of the following:

- Create a new role profile by clicking **New**.
- Change the Function Access or Display profile for an existing Role Profile by selecting the profile and clicking **Edit**.
- Duplicate an existing profile (which you can then edit) by selecting the profile and clicking **Duplicate**.
- Delete a profile by selecting the profile and clicking **Delete**.

Role Profile Editor

1. Enter a name and, optionally, a description for the Role Profile that you are creating or modifying.

2. Select one Function Access Profile and one Display Profile.

3. Do one of the following:

   - Click **Save** to save the profile and create another profile.
   - Click **Save & Return** to save the profile and return to the Role Profile List
   - Click **Return** to discard the new profile (or edits that you made to an existing profile) and return to the Role Profile List.

Access the Role Profile Editor by choosing **Setup > Common Setup > Role Profiles > New** from the navigation bar.

Enabling and requesting a delegation of authority

To enable and request an individual to act in your role, do the following:

1. Click **Actions** on the navigation bar.
2. Click **Mgr_Delegation**. The system displays the Action screen.
3. Select **Create New Delegation**, and click **Next**. The system displays the Create Delegation screen, which includes any existing delegations.
4. On the Create Delegation screen, do the following:
   a. Identify the individual who will act in your role by selecting a name from the Delegate list. The names on this list come from your Delegate Data Access Profile. If you do not find the individual that you want on the drop-down list, ask your administrator to assign you a Delegate Data Access Profile that includes that individual.
   b. Enter the Start and End dates of the period when the individual should be authorized to act as your delegate. The start time is 12:01a.m. on the Start Date, and the end time is 11:59p.m. on the End Date.
   c. Select the role that you want the delegate to assume.
   d. Click **Save & Close**.

The individual you selected must now accept the request before acting as your delegate. A message is automatically sent to the delegate with the delegation request, and mail is automatically sent to you when the delegate accepts or declines the request.

Canceling or deleting a delegation request

You can cancel a delegation request that you have made. The process that you use depends on whether or not the delagate has already accepted the delegation request.

Canceling a delegation request that has not yet been accepted

1. Click **Inbox** on the navigation bar, and select the Tasks tab.
2. Find the cancel delegation task item.
3. Select the item and cancel the delegation. When you do so, the Accept Delegation task is removed from the delegate's Inbox, and the system sends an explanatory message to the delegate.

Canceling a delegation request that has been accepted

1. Click **Actions** on the navigation bar.
2. Click **Mgr_Delegation**. The system displays the Action screen.
3. Select the delegation that you want to cancel.

Accepting a delegation of authority request

When a manager requests you to act as that manager's delegate (that is, to perform the manager's tasks such as approving timecards), a task is delivered to your Inbox. Before you can act as a delegate and perform tasks in the manager's role, you must do the following:

1. Click **Inbox** on the navigation bar, and select the Tasks tab. A task item from the manager that includes subject text similar to "Accept Delegation" is included in your task.

2. Double-click the task item that includes the "Accept Delegation" text in the subject. The system displays the Accept Delegation dialog.

   The Accept Delegation dialog shows the following information:

   – The individual who made the delegation request (the **Delegator**)

   – The time period during which you would have authority to act in the Delegator's role. You would have this authority from 12:01a.m. on the start date until 11:59p.m. of the end date.

   – The specific role of the delegator that you would assume. (Some individual might have multiple role profiles in the system.)

3. Select either Accept Delegation or Decline Delegation.

4. Click Save & Close. The "Accept Delegation" task is removed from your Inbox. In addition, a message is automatically sent to the delegator to confirm that you have accepted or declined the delegation request.

You can switch roles and perform tasks as the delegator at any time from the start date until the end date. However, you must log out of the system and log back in again before you can act as the delegate.

Switching Roles

After you have accepted a delegation request, you can switch roles and perform tasks as the delegator at any time from the start date until the end date of the delegation period.

If you have not logged out of the system since accepting the delegation request, log out of the system and re-log in. Notice the **Switch Role** indicator area of the screen, immediately above the navigation bar and just below **Change Password**. When you log on to the system, the Switch Role indicator always list your role as "Myself."

Note: If the Switch Role area is not displayed on the screen, it means either that you do not have a current delegation authority, or that you have not logged out and back in to the system after having accepted a delegation authority.

To continue using the system in your own role, do nothing in the Switch Roles area.

To perform tasks in the role of the delegator whose request you accepted:

1. Click **Switch Role**. The Switch Role dialog is displayed.
2. Select the delegator whose tasks you want to perform.
3. Click **Switch Role** on the menu bar. (Be sure to click the Switch Role on the menu bar and not the text in the Switch Role indicator area.) The Switch Role indicator area is now colored red, and the role of the delegator is displayed.

To return back to your role, repeat steps 1-3, but selecting **Myself** in step 2.

Delegate Data Access Profile

A Delegate Data Access Profile is a list of individuals who can be subsequently authorized to act with your authority when you are unable to do so. For example, a manager going on vacation might want to authorize an individual to act in the manager's behalf.

To assign any one of these profiles to a manager in the Access Profile workspace of the People Editor:

1. Enter a name for the profile, and, optionally, a description.
2. Find a delegate that you want to include on the profile by entering all or part of their last name in the Delegates box and then clicking **Search**. (This box works in the same way as finding individuals using QuickFind.)
3. Add the individual to the Selected Delegates list by clicking the right-arrow.
4. Repeat steps 2 and 3 until the list of delegates is complete.
5. Click **Save** or **Save & Return**.

The Delegate Data Access Profile that you just created or modified will appear in the list of profiles that can be assigned in the People Editor.