Getting Started with Workforce Timekeeper™ A Guide for Managers

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

Kronos Workforce Central Suite
Version 5



Document Part Number: 4703755-001 Document Revision: A The information in this document is subject to change without notice and should not be construed as a commitment by Kronos Incorporated. Kronos Incorporated assumes no responsibility for any errors that may appear in this manual. This document or any part thereof may not be reproduced in any form without the written permission of Kronos Incorporated. All rights reserved. Copyright 2006.

Altitude, Cambridge Clock, CardSaver, Datakeeper, Datakeeper Central, eForce, Gatekeeper, Gatekeeper Central, Imagekeeper, Jobkeeper Central, Keep.Trac, Kronos, Kronos Touch ID, the Kronos logo, My Genies, PeoplePlanner, PeoplePlanner & Design, Schedule Manager & Design, ShiftLogic, ShopTrac, ShopTrac Pro, StarComm, StarPort, StarSaver, StarTimer, TeleTime, Timekeeper, Timekeeper Central, TimeMaker, Visionware, Workforce Accruals, Workforce Central, Workforce Decisions, Workforce Express, Workforce Genie, and Workforce TeleTime are registered trademarks of Kronos Incorporated or a related company. Altitude Dream, Altitude MPPXpress, Altitude Pairing, Altitude PBS, Comm.Mgr, CommLink, DKC/Datalink, eDiagnostics, FasTrack, HR and Payroll Answerforce, HyperFind, Improving the Performance of People and Business, Kronos 4500 Touch ID, Kronos 4500, Kronos e-Central, KronosWorks, KVC OnDemand, Labor Plus, Momentum Essentials, Momentum Online, Momentum, MPPXpress, Schedule Assistant, Smart Scheduler, Smart View, Start Quality, Start WIP, Starter Series, StartLabor, Timekeeper Decisions, Timekeeper Web, VisionPlus, Winstar Elite, WIP Plus, Workforce Activities, Workforce Analytics, Workforce Attendance, Workforce Connect, Workforce Employee, Workforce HR. Workforce Leave, Workforce Manager, Workforce MobileTime. Workforce Operations Planner, Workforce Payroll, Workforce Record Manager, Workforce Recruiter, Workforce Scheduler with Optimization, Workforce Scheduler, Workforce Smart Scheduler, Workforce Tax Filing, Workforce Timekeeper, and Workforce View are trademarks of Kronos Incorporated or a related company.

Mozilla.org is a registered trademark of the Mozilla Foundation. All other trademarks or registered trademarks used herein are the property of their respective owners and are used for identification purposes only.

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

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

For links to information about international subsidiaries of Kronos Incorporated, go to http://www.kronos.com

Document Revision History

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

Using Workforce Timekeeper	
Logging On and Off	. 5
Home Page	. 6
Understanding the Display	
Navigating Workforce Central	. 8
Using a Browser	
Browser Settings	. 9
Using Online Help	
Changing Your Password	10
Workforce Genies	11
Using Genies	11
Detail Genies	13
QuickFind	14
Selecting One or More Employees	
Exporting Genie information to an Excel file	15
Using Timecards	16
Calculating and Displaying Timecard Totals	
Timecard Indicators and Colors	
Common Timecard Tasks	20
Transferring Time	
Viewing Employee Totals	
Approving or Signing Off Timecards	23
Group Editing	
Example: Approving a Group of Timecards	26
Calendars	27
Using and Understanding My Calendar	
Using Calendars to Manage Employee Time	28
Generating Reports	29
Available Reports	29
Running a Report	30
Accessing Your Information	33
Using the Tasks Feature	34
Completing an assigned task	34
Reassigning an assigned task	34
Using the Kronos Messaging System	35
Opening messages	
Sending messages	35
Replying to messages	35
Using the Actions Feature	37

Table of Contents

Bidding for Vacation	38
Viewing Your Bids	
Editing and Submitting a Bid	
Declining to Bid	
Delegating Authority	41
Creating or modifying a Delegate Data Access Profile	42
Defining Role Profiles	43
Role Profile List	43
Role Profile Editor	43
Enabling and requesting a delegation of authority	44
Canceling or deleting a delegation request	
Canceling a delegation request that has been accepted	45
Accepting a delegation of authority request	46
Switching Roles	47
Delegate Data Access Profile	48

Using Workforce Timekeeper

Kronos[®] Workforce Timekeeper™ is the foundation of the time and labor management capability of the Kronos[®] Workforce Central Suite[®] of products that also 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 a Microsoft Internet Explorer Web browser to enter, review, edit, and approve the time that they spend in job-related activities. You can then review, edit, or approve their time and use the system to generate reports and transfer time information to your company's payroll system.

Workforce Central includes two user interfaces for both managers and employees:

- The Java applet version is the full-feature interface that downloads applets from the application server to each client machine.
- The HTML Client version provides core Workforce Central functionality without downloading Java applets.

This document describes the Kronos[®] Workforce ManagerTM - HTML Client functionality.

Logging On and Off

To log on to the Workforce Central HTML user interface, you enter the appropriate Web address (URL) in your browser. Although the URL may be different for your company, the default is:

http://<*AppServer*>/wfc/applications/wtk/html/ess/logon.jsp where <*AppServer*> is the name of your application server.

After you log on, the system checks your access profile and:

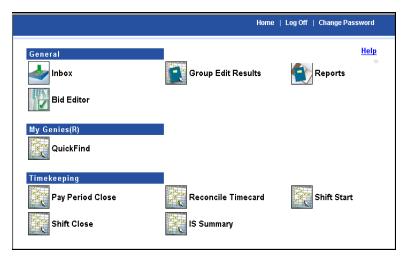
- If you are a manager, the Workforce Manager HTML Client user interface appears in your browser.
- If you are an employee only, the Workforce Employee[™] HTML Client user interface appears in your browser.

When you finish using the system, you should log off by clicking Log Off at the top of the workspace.

Note: Depending on how your system is configured, if you are logged on for a period of time defined by your company and Workforce Central detects no activity, the system may automatically log you off and return to the logon page.

Home Page

After you log on to the system, the Workforce Manager - HTML Client home page appears.

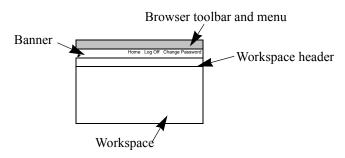


The home page contains links to the components for which you have access rights and a license (if applicable), grouped by category:

- General—Links to Group Edit Results and Reports that you can generate. Group Edit Results are populated only after you make a group edit using an Kronos[®] Workforce Genie[®].
- My Genies—Links to configurable Detail and QuickFind Genies, which provide an easy way to review summary information about your employees.
- **Timekeeping**—Links to features that help you manage your employees' time.
- My Information—Links to the components that you need to manage your own time, such as My Timecard, My Time Stamp, and My Earnings History. These components are discussed in *Getting Started with Workforce Scheduler—A Guide for Employees*.
- **Kronos add-on products**—Links to Kronos add-on products that you have installed and licensed.
- My Links—Links that your company has made available to you.

Understanding the Display

Each Workforce Manager - HTML Client component contains the following display elements:



Element	Description
Browser toolbar and menu	The Internet Explorer browser toolbar and menu
Banner	The banner contains the following links:
	 Home returns to the Workforce Manager - HTML Client home page. Log Off terminates your session and returns to the logon page.
	The banner may also contain a Change Password link that allows you to change your password.
Workspace and header	The workspace is the primary area for displaying the Workforce Manager - HTML Client components. The header of the workspace contains:
	 Name of the component that you are viewing Link to the online Help System messages, such as error or approval notices
	The workspace also includes such controls as drop-down lists, buttons, and cells for entering information.

Note: The Workforce Manager - HTML Client display is customized according to your company's time and attendance policies and your access profiles. Because of this customization, the features described in this guide might appear or act differently in your system. Contact your Workforce Central administrator for more information.

Navigating Workforce Central

To navigate the Workforce Manager - HTML Client interface of Workforce Central, you use numerous navigational buttons, dialog boxes, and drop-down lists that are located within the workspace of each component. You also use some of your browser's controls.

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

Using a Browser

In addition to the Workforce Manager - HTML Client navigational controls, standard browser controls are also available. The browser controls have the following characteristics:

- URL Address combo box displays the URL of the currently active component.
- Favorites (Bookmarks) allow you to add the Workforce Manager -HTML Client URL to your browser's Favorites list. You can then click on the bookmarked entry to launch the Workforce Manager -HTML Client Log On display.
- Back and Forward buttons can cause a "Warning Page Expired" message to appear. You should use the Workforce Central navigation controls instead of the browser's back and forward buttons.
- Refresh (Reload) button reloads Workforce Manager HTML Client. You will lose any edits that you made since the last time you saved the information. It does not refresh the Workforce Central information.
- Stop button interrupts the loading of Workforce Manager HTML Client pages.
- Print button prints the workspace.

Browser Settings

Workforce Manager - HTML Client requires the following settings for optimum viewing:

- Your monitor should be set to 1024 x 768 (or 800 x 600 with scroll bars), 16-bit resolution.
- You must enable 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.
- If you use pop-up-blocking software, you must configure it to allow the Workforce Central application server to use pop-ups.

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

Using Online Help

All Workforce Manager - HTML Client components include online Help. Select the Help link located in the upper-right corner of the workspace header to obtain Workforce Manager - HTML Client online help. A new browser window will open containing the requested Help page.

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



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.

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

Changing Your Password

Depending on how Workforce Central is configured at your company, a Change Password link may appear in the workspace header.

To change your password:

- 1. Click the Change Password link.
- Enter your old password in the Change Password dialog box.
- 3. Enter your new password in the New Password and Verify Password text boxes. Depending on the



type of database in use at your company, your user name and password may be case-sensitive. See your Workforce Central administrator for more information.

4. Click Change Password Now.

Workforce Genies

A Genie is a configurable tool for automating management tasks. It shows a summary of key employee information and lets you access other Workforce Central components. With Workforce Genies, you can set up summary displays that allow you to:

- See summary information such as hours and exceptions for a group of employees.
- Make group edits for all, one, or a selected group of employees.
- Select an employee or group of employees and then navigate to their timecards.
- Select a group of employees about whom to generate a report.

Two types of Workforce Genies are available with Workforce Manager - HTML Client:

- Detail Genies
- OuickFind

Note: Because Workforce Genies are configurable, they may appear differently or have different names than described here. See your Workforce Central administrator for information specific to your company.

Using Genies

The overall layout of each Genie is similar:



The following categories of information are available in Genies to help you identify the appropriate information:

- Show (Detail Genies) or Name or ID (QuickFind)
- 2 Time Period
- Actions

Workforce Genies

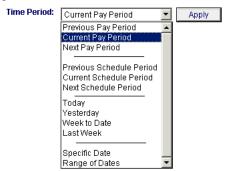
Show

The Show drop-down list includes all HyperFind queries to which you have access. You cannot change these HyperFind queries in Workforce Manager - HTML Client.



Time Period

The Time Period drop-down list displays the times for which you can generate information. Select a time and then click Apply.



Action

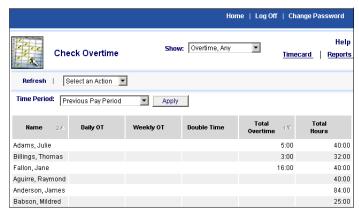
The Action drop-down list includes all of the actions that you can perform:

Action	Result
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.
Sort Table	Sorts the table based on column(s) in the table.
	Click a column header to sort the display on that column and then select Sort Table from the Action drop-down list.
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.

Action	Result
Sign Off	Indicates the final approval. Typically, if you select this action, Workforce Central closes the selected employee records so they can be processed by payroll, and no further edits may be made unless the sign-off is removed.
Remove Sign-Off	Removes your timecard sign-off.

Detail Genies

Detail Genies present summary information organized by employee name. A Detail Genie is often the starting point for editing timecards and requesting reports for selected people.

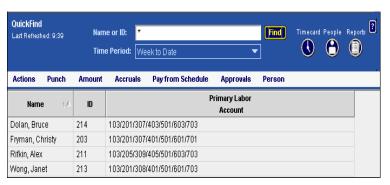


The Detail Genies that appear in your workspace are based on your company's requirements and your display profile and may include:

- **Reconcile Timecard**—Lists unexcused absences, missed punches, overtime, and other time irregularities for your employees.
- Pay Code Summary—Organizes the total amount of time charged to various pay codes by your employees.
- **Shift Start and Shift Close**—Shows the status of employee time at the beginning or end of a shift.
- Check Overtime—Summarizes the types of overtime charged by your employees.
- Pay Period Close—Shows the status of approvals, time irregularities, and total hours for your employees.
- **IS Summary**—Lists employee information such as home account, user name, email address, badge number, and manager name.

QuickFind

QuickFind allows you to search for one or more people, based on their name and ID.



To use the QuickFind feature:

- 1. Select My Genies > QuickFind on the home page.
- 2. Select the Time Period that you want to search.
- 3. Enter an employee name or ID, with or without wildcard characters (* % ?).
- 4. Click Find.

When the system returns the requested information, you can select one or more employees and then:

- Click Timecard to navigate to the timecard of a listed employee(s).
- Click Reports to generate a report about the selected employees.
- Select E-mail from the Actions drop-down list to send a message to the selected employee(s)
- Select Approve or Sign Off from the Actions drop-down list to approve or sign off the time of the selected employee(s)

You can also reorganize the order of the information by clicking a column and then selecting Sort Table from the Actions drop-down list.

Selecting One or More Employees

To display additional information about one employee from an Workforce Genie, select the employee name, and then click Timecard or Reports in the banner.

To display additional information about more than one employee:

- 1. Hold down the Ctrl or Shift key and select multiple employee names. Or, if you want to select all employees, click Select All from the Actions drop-down list.
- 2. Click the Timecard or Reports. The Timecard or Reports workspace appears, 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.



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.

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

Each employee's timecard is configured 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 pay code, for example:



For more information about how employees use timecards, refer to *Getting Started with Workforce Central—A Guide for Employees*.

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 Central 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 Central 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 the Background Processor's update interval is set to 30 seconds. After remaining idle for 30 seconds, the Background Processor recalculates totals for all employees whose totals are not up to date. The Background Processor is then idle for 30 more seconds before calculating totals again. The update interval can be set 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. However, if you edit your timecard and want to see the totals immediately, you must save the Timecard, then click Refresh.

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 Central system calculates timecard totals. For information specific to your system, contact your Workforce Central administrator.

Timecard Indicators and Colors

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

Indicators	Description
2:59PM ^B	A small yellow note icon after a punch or amount indicates a comment about the cell's contents.
	Click the icon to view the comment.
9:37AM	A solid red cell indicates a missed in-punch or outpunch.
5:11PM 9:36 11:04AM	A red outline in a cell indicates an exception, such as a late punch, early punch, or long interval.
Mon 1/28 Tue 1/29 Absent 8:00 Wel Excused	A blue outline around a date cell indicates an excused absence.
Sun 3/18	A red outline around a date cell indicates an unexcused absence.
8:30	A transaction shown in purple indicates that the transaction contains data from a schedule or from a punch at a data collection device.
1:00	If the cell is white, you can edit the transaction. If the cell is gray, you cannot edit the transaction.
7:00AM ^{III}	A small yellow note icon and red outline indicate that a punch or amount has a comment and an exception.
1:00 1:00	Gray cells indicate that you cannot edit the contents.

Indicators	Description
Totals & Schedule	A red flag in the Totals column indicates that edits have not yet been totaled.
Sun 1/27(o) 4on 1/28(o) Tue 1/29	A yellow flag next to the Save button indicates that edits have not been saved in the database.
5	Clicking the search icon, which is next to the Transfer cell in the timecard or Time Stamp, opens the Transfer Selection dialog box that you use to transfer to a different labor account, job, or work rule.
Account (0)103/201/305/404/ (0)103/201/305/404/	An (x) before an account in the Totals Summary indicates that it is not the primary labor account.

Common Timecard Tasks

Some of the tasks that you may be able to perform on your timecard include:

Task	Procedure
Add a comment to the timecard	Click a pay code, punch, or amount, then select Comments from the Actions drop-down list.
	Select a comment from the Comments dialog box to apply to the pay code, punch, or amount.
Add a row	Select the Add Row icon
Approve a timecard	Select Approve from the Actions drop-down list. A message then appears, indicating the time period and approval manager's name.
	See "Approving or Signing Off Timecards" on page 23 for more information.
Cancel edits	Click the Refresh button.
	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, although you can edit them if you have the applicable access rights.
Edit a punch or amount	Enter the correct time or amount directly in the cell.
Print a timecard	Click the Print button on the browser toolbar.
Save a timecard after editing	To save your edits, click Save. The system responds based on your access rights:
	 If you have the access rights to totalize, the system refreshes the screen with totalized information, the red flag disappears, and a timestamp and message appear, "Timecard successfully saved." If you do not have the access rights 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.

Transferring Time

Depending on your access rights, you may be able to transfer employee time to a different labor account, job, 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 as follows:

- 1. Click the search icon next to the Transfer cell in the timecard.
- In the Transfer Selection dialog box, use the drop-down lists to select the job, labor account, or work rule to which you want to transfer and click OK.



The selected job, labor account, or work rule then appears in the Timecard

Viewing Employee Totals

While viewing a timecard, you can generate an online summary of the employee's totals, organized by job, account, and pay code for the designated time period.

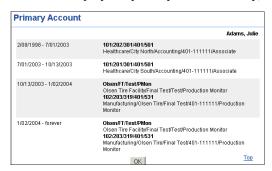
- 1. Open an employee timecard.
- 2. Select Total Summary from the Action drop-down list and click Apply. The Totals Summary box appears:.



To see the totals summary for a different time period:

- 1. Close the Totals Summary window.
- 2. Change the Time Period in the timecard
- 3. Click Apply.

You can also click the Primary Account link below the employee name to review the employee's primary account history, for example:



Approving or Signing Off Timecards

You can use Workforce Manager - HTML Client to make two types of approvals:

- Approve timecard
- · Sign off timecard

Access to these approvals is based on your company's policies and your access rights. Contact your Workforce Central 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 or a range of dates.

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 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 your company's approval process, a higher-level supervisor or manager might be able to change timecards that you have approved.

To approve a timecard:

- 1. Select an employee from an Workforce Genie and click Timecard.
- 2. In the timecard, select a pay period or a range of dates from the Time Period drop-down list.
- 3. From the Action drop-down list, select Approve. A message appears, confirming your action.

Approvals: Approval by Manager (cfryman): 3/01/2004 - 3/07/2004

To approve a group of timecards, see "Group Editing" on page 25.

Common Timecard Tasks

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 payroll system; employees do not have sign-off rights.

The process for signing off a timecard is the same as for approval, except that you select Sign Off from the Action drop-down list. 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 Central 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.

Group Editing

With the group editing feature, you can edit groups of employee timecards at a single time.

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 Central 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 Workforce Manager - HTML Client home page. 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.



A status of FAILED may show if there was a problem with completing the group edit and not all employees selected were processed. If a failure occurs, a link to the failure explanation appears. You can follow this link to determine why the employee(s) were processed but the group edit could not be applied.

Example: Approving a Group of Timecards

To approve a group of timecards:

- 1. Start one of the Genies, such as QuickFind.
- 2. Identify a group of employees by holding down the Ctrl or Shift key and selecting the appropriate employee names.
- 3. From the Actions drop-down list, select Approve. A confirmation message appears:



- 4. Click OK.
- 5. Click Home to return to the Workforce Manager HTML Client home page.
- 6. Select **Time and Attendance** > **Group Edits Results** on the home page.
- 7. In the Group Edit Results workspace, click Refresh until the status shows as COMPLETED.



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 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.

In the diagram, the selected employee worked day shifts (green), night shifts (orange), and evening shifts (yellow). Viewing the day detail for any day provides additional data that might be configured to appear on this summary calendar.



You can modify and duplicate the generic calendars, such as the Work & Absence Summary, to contain information that is relevant to the individual's role and responsibility. The Work & Absence Summary is one of the generic calendars.

Generating Reports

The Reports component enables you to select and run a predefined report. When you run a report, the system extracts data from the database and formats it in rows and columns that can be displayed, printed, or e-mailed.

You can run a report in either of two ways:

- Select Reports from the Workforce Manager HTML Client home page.
- Select a Timecard or group of employees from a Genie and click Reports from the banner.

Available Reports

Nine standard management reports are listed along the left side of the Reports workspace:

- Accrual Balances and Projections Displays the current balances, as well as future takings, credits, and projected balance of the selected employees, up to a specific date two years out. You can use this to determine if an employee has accrued enough time for a vacation.
- Accrual Detail Displays running accrual balances for each employee. For example, you can see what types of accrual transactions occurred in the past, when accrual balances were reset, and effective dates
- Badge Numbers Lists the badge numbers and the employee assigned to each, including the activated and inactivated date if applicable. Employees with no badge numbers do not display on this report.
- Employee Schedule Monthly Shows the schedules of the employees whose home location is one of the selected locations. Employees are sorted by job and shift labels are displayed. This report displays 28 days per page and uses 8.5- x 14-inch paper.
- Employee Schedule Weekly Shows the schedules of the employees whose home location is one of the selected locations. Employees are sorted by job. This report displays seven days per page and uses 8.5- x 11-inch paper.
- Schedule by Labor Account Weekly Shows schedules for the selected labor accounts. Employees are sorted by labor account and shifts have a start/stop time. This report displays seven days per page and uses 8.5- x 11-inch paper

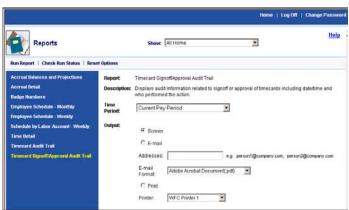
Generating Reports

- Time Detail Displays detailed data about each employee's
 punches, duration, and pay code edits. Summary data displays per
 employee show totaled time and money by labor level and pay code
 (excluding combined pay codes) and then just by pay code (listing
 combined pay codes separately).
- Timecard Audit Trail Displays audit information related to specific timecard actions including date/time of the action, who performed the action, and what information changed. This report does not show the timecard signoff and approval audit trail because this information is provided in a separate report. Managers can filter this report by editing manager or source of the edit, such as the timecard or a timekeeping device.
- Timecard Signoff/Approval Audit Trail Displays audit information related to signoff or approval of timecards including date/time and who performed the action.

Running a Report

To run a report:

- Select the HyperFind from the Show drop-down list, unless an employee or group of employees has been previously selected.
- 2. Select a report to run from the list on the left side of the workspace. The selected report workspace appears. The following example shows the Timecard Signoff/Approval Audit Trail report:



3. In the selected report workspace, do the following:

- Report name and description—Review the information to ensure that you have selected the correct report.
- Time Period—Select the time period of the report from the drop-down list. If you select a specific date or range of dates, you can click the calendar icon which opens the calendar to help you identify and select the appropriate dates.
- 2004 10 11 12 13 16 17 18 19 22 23 24 25 26 27 • **Options**—Depending on the report, 29 various options may be listed. For example, on some reports you can
 - indicate to have a page break inserted after each employee in the report or you can have the report totals represent the actual amounts or adjusted with historical data. Some pay codes appear on Reports but do not appear in the Timecard.
- Output—Select one of the output methods from the following options. Note that you must have Adobe Acrobat Reader installed on the client machine in order to view a report on your computer screen.

Screen The report will appear on the screen only.

E-mail

The report can be emailed to someone. Enter the recipient's email address and the format of the report to be sent in the email:

- Adobe Acrobat document (.pdf)
- Hypertext markup language (HTML)
- Microsoft Excel document (.xls)
- Microsoft Word document (.doc)
- Rich text format (.rtf)

Note: Multiple email addresses must be separated by a comma and the server needs to be appropriately configured.

If you select .pdf for your email format, you can also select View Report from the Report Run Status box to see the report on your screen.

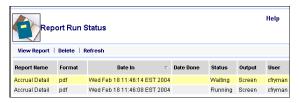
Print

The report can be sent to a printer as configured in the application server. Select the appropriate printer from the drop-down list.

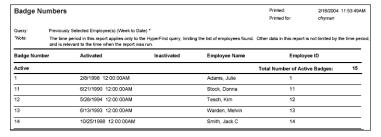
- 4. After you make all of your selections, click Run Report.
- 5. To check the status of the report, click Check Run Status.

Generating Reports

6. In the Report Run Status workspace, click Refresh until the report's status is complete.



7. If you selected Screen or Email .pdf output in step 3, you can select the report and click View Report to display the report. All other output displays cannot be viewed on the screen



You can also:

- Print the report by using the browser's Print capability when the report is displayed.
- Delete the report by clicking Delete in the Report Run Status workspace.

Accessing Your Information

If you have an employee license, Workforce Manager - HTML Client includes the following components that you can use to enter your own time, depending on your company's requirements and your access rights:

- **Timecard**—Within Timecard, you can enter, review, edit, and approve the time that you spend in job-related activities. You can also enter time off; for example, sick or vacation time.
- Time stamp—Time stamp in Workforce Central is similar to punching in at a data collection device, such as a Timekeeper terminal

Each workspace contains links to the components that you can access. For example, the Reports component allows you to view and print your accruals, schedule, and time detail reports.

In some cases, your timecard may be prepopulated with times entered automatically from your schedule or from a badge reader.

Your time entry method is determined by your company's timekeeping requirements. To enter your time, you access a URL by an icon or from the Workforce Manager - HTML Client home page.

Note: Workforce Manager - HTML Client uses the time of the database server for the clock display and to record time stamps. The time is not the time of the computer you are using. If you are in a different time zone than the database server, the system converts the database server's time to your local time zone when it displays the time on your browser. You cannot change the time recorded by adjusting the time on your PC.

For more information about Workforce Employee-HTML Client, refer to *Getting Started with Workforce Scheduler—A Guide for Employees*.

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 37. 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 35.

To view your Tasks list, click **Inbox > Tasks** in your Workforce Central self-service window

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.
- 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:

- Select a message from the list and then click Reply on the Messaging menu bar. The Reply Message dialog box appears.
- 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.

Using the Kronos Messaging System

- 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)

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 information 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 35.

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.
- Click Edit.
- 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.
- If you want to add additional bids, click the green arrow in the leftmost column to create a new line for each new bid and enter the information.

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

Bidding for Vacation

- 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 a 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:

- 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).
- 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:

- 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.
- 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:

- 1. Click **Actions** on the navigation bar.
- 2. Click Mgr Delegation. The system displays the Action screen.
- 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:
 - 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.
 - 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.
 - Select the role that you want the delegate to assume.
 - 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.

To cancel 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

To cancel 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.
- 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.
- 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.
- 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.