

# KRONOS TRAINING

CT HR MANAGER & STAFF

# AGENDA

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## Getting Started

- Signing in
- Understanding the Kronos Navigator
- Viewing your information

## Leave

- Viewing Leave Cases
- Leave Case Actions
- Additional Information
- Eligibility & Leave Types
- Frequency & Duration
- Notifications
- Employment status
- Leave Rules

## Finding your team

- Search for an employee report
- Working with hyperfinds
- Working with Genies

## Timecards

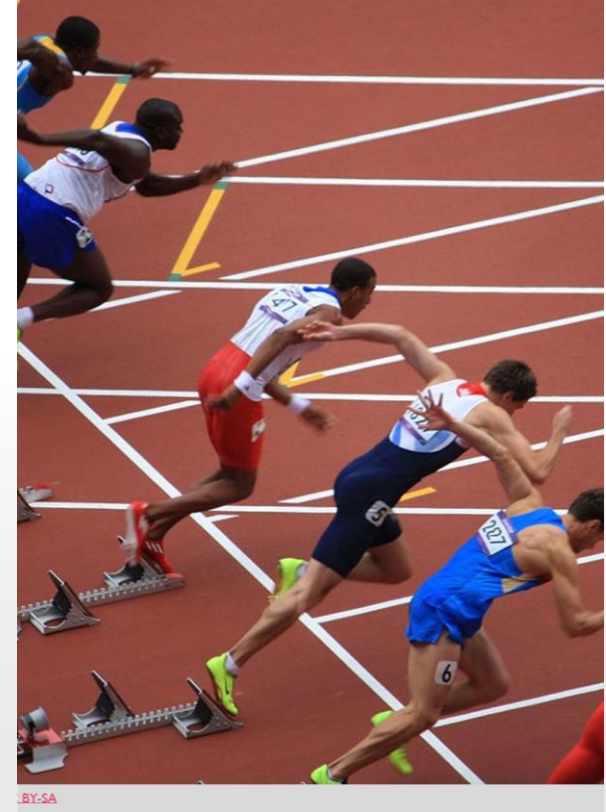
- Editing punches
- Editing pay codes
- Adding comments
- Adding rows
- Transfers
- Scheduling a pattern
- Approving Timecards
- Audits

## Time-Off

- Reviewing time off requests
- Time off reports

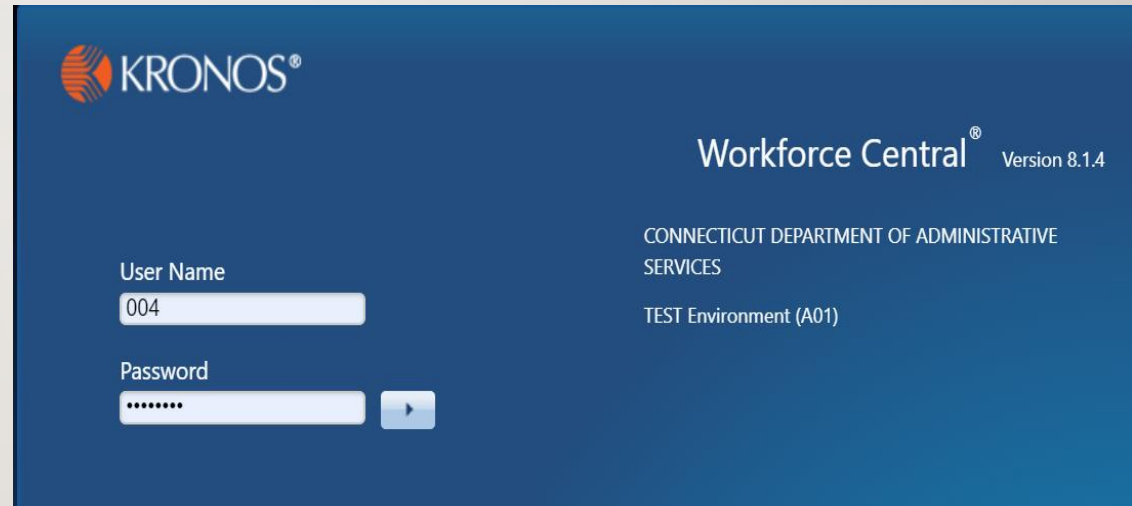
# GETTING STARTED

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# GETTING STARTED – SIGNING IN

- Open a web browser and enter <https://ctgov-tst.kronos.net/wfc/htmlnavigator/logon>
- Enter your user name and password



The image shows a login screen for KRONOS Workforce Central. The background is a solid blue color. In the top left corner, there is the KRONOS logo, which consists of an orange circular icon with white lines and the word "KRONOS" in white capital letters. To the right of the logo, the text "Workforce Central" is displayed in white, followed by "Version 8.1.4" in a smaller font. Below the logo, there are two input fields: "User Name" and "Password". The "User Name" field contains the text "004". The "Password" field contains a series of dots. To the right of the password field is a blue button with a white right-pointing arrow. To the right of the input fields, the text "CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES" is displayed in white, followed by "TEST Environment (A01)" in a smaller font.

KRONOS®

Workforce Central® Version 8.1.4

CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES

TEST Environment (A01)

User Name  
004

Password  
.....



# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

The screenshot shows the Kronos Navigator interface. At the top, there's a navigation bar with the Kronos logo and a '2' in a circle. Below the navigation bar, there's a 'My Information' tab and a 'Manage My Department Interfaces' dropdown. The main area displays a table with columns for Date, Schedule, Pay Code, Amount, In, Transfer, Out, In, Transfer, Out, Shift, Daily, and Period. The table shows data for the week of January 3rd to 12th. A '1' in a circle highlights the 'View' button on the left side of the table.

		Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
+	x	Fri 1/03	8:00AM-4:00...											
+	x	Sat 1/04												
+	x	Sun 1/05												
+	x	Mon 1/06	8:00AM-4:00...											
+	x	Tue 1/07	8:00AM-4:00...											
+	x	Wed 1/08	8:00AM-4:00...											
+	x	Thu 1/09	8:00AM-4:00...											
+	x	Fri 1/10	8:00AM-4:00...											
+	x	Sat 1/11												
+	x	Sun 1/12												

1. Employee timecard:  
Can add your own punches, add specific pay codes, and also approve your timecard
2. Clicking the ' + ' sign will bring you a list of the different modules you can access, as a timekeeper you can manage your department and export time reports

# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

**KRONOS**

My Information + Manage My Department Interfaces

My Timecard

Loaded: 11:56 PM Current Pay Period

View Approve Timecard

Print Timecard Refresh Calculate Totals Save

	Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
+ x	Fri 1/03	8:00AM-4:00...											
+ x	Sat 1/04												
+ x	Sun 1/05												
+ x	Mon 1/06	8:00AM-4:00...											
+ x	Tue 1/07	8:00AM-4:00...											
+ x	Wed 1/08	8:00AM-4:00...											
+ x	Thu 1/09	8:00AM-4:00...											
+ x	Fri 1/10	8:00AM-4:00...											
+ x	Sat 1/11												
+ x	Sun 1/12												

1. Can use the drop down and the calendar icon to change the time period view
2. The buttons allow you to refresh, save, and print out your timecard information

# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

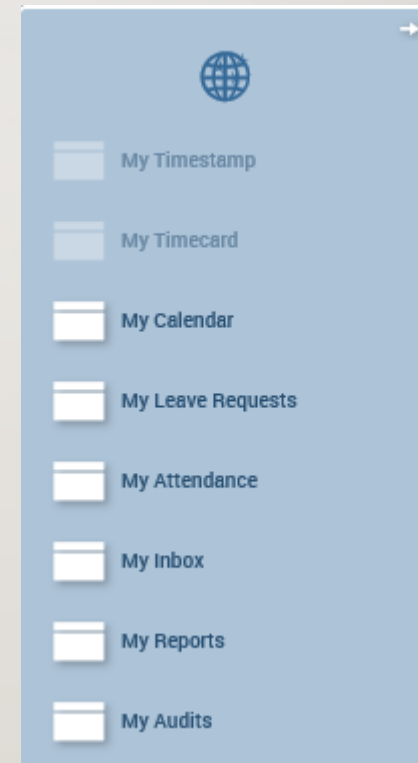
1. User information and log off
2. Last timestamp and transfer allows you to execute a transfer and record a punch
3. Related Items menu: Through related items you can access all the different widgets that interface has to offer, as you cycle through my information, manage my department, etc the related items menu will update
4. Search: Can provide help with any look up you're having trouble with

The screenshot displays the Kronos Navigator interface. The main dashboard is divided into two sections. The top section, labeled '1', contains user information: 'Timekeeper Persona' and 'Sign Out'. The bottom section, labeled '2', shows the 'My Timestamp' widget with a 'Last Timestamp' field and a 'Transfer' dropdown menu. A 'Record Timestamp' button is also present. The right sidebar, labeled '3', lists various widgets: 'My Timestamp', 'My Timecard', 'My Calendar', 'My Leave Requests', 'My Attendance', 'My Inbox', 'My Reports', and 'My Audits'. A search icon is located at the top of the sidebar. A modal window, labeled '4', is open on the right, titled 'Transfer'. It contains fields for 'Job', 'Labor Account', and 'Work Rule'. Below these are tabs for 'Job Transfer', 'Labor Account', and 'Work Rule'. The 'Add Labor Account' section includes fields for 'Agency-Dept...', 'Employee ID-E...', 'Location', 'Supervisor', 'Combo Code', 'Job', and 'Override Reas...'. A 'Clear All' button is at the top right of the modal, and 'Cancel' and 'Apply' buttons are at the bottom right.

# GETTING STARTED –VIEWING YOUR INFORMATION

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Through the related items menu on the right side of the screen you can access all your information





# GETTING STARTED –VIEWING YOUR INFORMATION

Through the My Calendar widget you can view your calendar and see your daily schedule as well as make requests for time off

My Calendar			
January 5 - 11, 2020			
Day	Week	Month	Visibility Filter Request Time Off
	Sun 1/05	Mon 1/06	Tue 1/07
8:00AM		8:00AM-4:00PM [8.00 h] Regular	8:00AM-4:00PM [8.00 h] Regular
9:00AM			
10:00AM			
11:00AM			
12:00PM			
1:00PM			
2:00PM			
3:00PM			

# GETTING STARTED –VIEWING YOUR INFORMATION

Through the Request Time Off button in the My Calendar widget you can fill in start date, end date, pay code, and time unit.

You can also view your accrual bucket balances at the bottom of the screen in order to choose which pay code to use for your request, click **Submit** at the bottom when completed.

### Request Time Off

Type: Time Off Request

		Start date	End date	Pay code	Time Unit	Start time	Daily Amount
<span>+</span>	<span>×</span>	1/07/2020	1/07/2020	Vacation	Full day		

Accruals on: 1/07/2020

Accrual	Balance
Bone Marrow Donor	56.0 Hour
Comp Time	0.0 Hour
Comp Time Holiday	0.0 Hour

Cancel
Submit

# GETTING STARTED –VIEWING YOUR INFORMATION



Through the My Attendance widget you can see the actions available you

1. The only available action for timekeeper is Manager Delegation
2. After having clicked manager delegation, you choose the delegate, the timeframe, and the role you would like to delegate and then **Save & Close**

A screenshot of a web widget titled "ACTIONS" with a status "Last Refreshed: 1:28 PM" and an information icon. It contains a "Refresh" button, a "Categories" dropdown menu set to "None", and an "Actions" section with a link "→ Manager Delegation".

**ACTIONS**  
Last Refreshed: 1:28 PM

**Refresh**

Categories None ▾

**Actions**

→ [Manager Delegation](#)

A screenshot of a web browser window titled "Create Delegation - Internet Explo...". The address bar shows "https://ctgov-tst.kronos.net/wfc/KDWEFormServlet?initFor...". The page has a section "Existing Delegations" with a dropdown menu showing "None". Below is a "New Delegation" section with fields for "Delegate" (a dropdown menu showing "Persona, Manager" and "Persona, Manager2"), "Start Date", "End Date", and "Role" (a dropdown menu showing "CT Payroll Manager"). At the bottom are "Save & Close" and "Cancel" buttons. A circled "2" is next to the "Delegate" dropdown menu.

Create Delegation - Internet Explo...

https://ctgov-tst.kronos.net/wfc/KDWEFormServlet?initFor...

**Existing Delegations**

None

**New Delegation**

\* Delegate: Persona, Manager  
Persona, Manager2

\* Start Date:

\* End Date:

\* Role: CT Payroll Manager ▾

**Save & Close** **Cancel**



# GETTING STARTED –VIEWING YOUR INFORMATION

- Through the My Inbox widget you can see all your tasks and messages
- Tasks are things you need to do or have started but not completed, in this case a manager delegation form I began on the previous slide and did not complete
- Messages can be notifications from supervisors or updates about timecards/requests

**INBOX**  
Last Refreshed: 1:35 PM

**TASKS** | **MESSAGES**

**Edit** → **Reassign** → **Refresh**

Status: **Active** ▼ As of Date: **12/08/2019** Categories: **All** ▼

From	Subject
Persona, Timekeeper	Manager Delegation, Request Form



# GETTING STARTED –VIEWING YOUR INFORMATION

1. In the My Reports widget Schedule and Time Detail can be viewed by selecting the report and the Time Period and click **View Report**
2. To view My Accrual Balances and Projections select the report and fill in the As Of date then click **View Report**

1

My Reports

REPORTS Name: Persona, Timekeeper

**View Report** Primary Account

AVAILABLE REPORTS

	Time Period	Schedule	Description
Schedule	Current Pay Period		
Time Detail			Displays an employee

My Accrual Balances and Projections

2

My Reports


REPORTS Name: Persona, Timekeeper

**View Report** Primary Account

AVAILABLE REPORTS

	Time Period	My Accrual Ba	Description
Schedule	Specific Date		
Time Detail			Displays an em

My Accrual Balances and Projections

As Of  

# GETTING STARTED –VIEWING YOUR INFORMATION

Through the My Audits widget you can view different actions such as punching in as shown on the right, or all the categories listed on the drop down

My Audits

Category:

My Audits

My Audits
My Comments
My Overtime Requests
My Signoff and Approval
My Moved Amounts
My After Sign-Off Audits
My Corrections
My Activity Event Audits

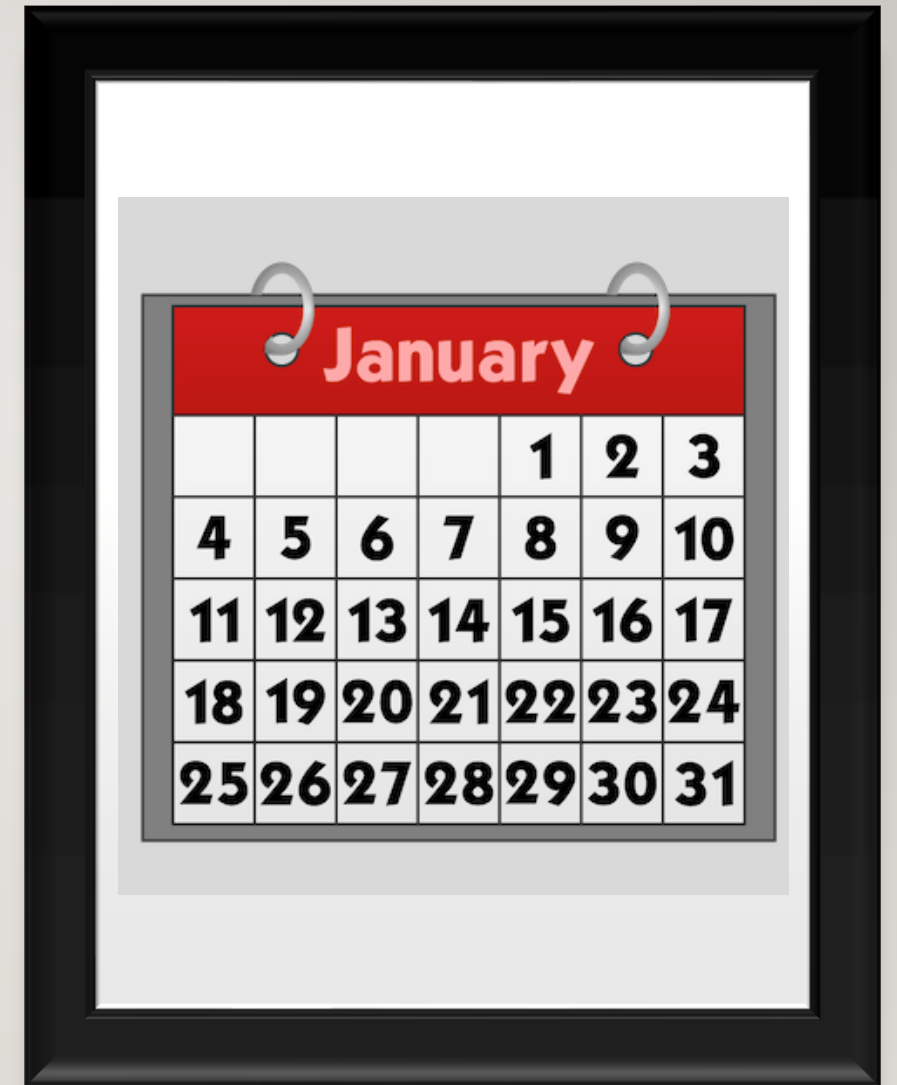
Type of Edit:

Punch (Add/Edit/Delete)

Time	Type	Account
52PM	Add Punch	

# LEAVE

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# LEAVE –VIEWING LEAVE CASES

1. In order to view leave cases, click the ' + ' symbol and open Leave Administration, all cases will appear here depending on the filters chosen
2. Using the Show drop down you can filter out what type of cases are shown as shown on the right, you can also use the Time Period drop down to select what time period or range of dates you want to view the requests in and narrow down your search

The screenshot displays the 'Leave Administration' interface. At the top, there's a navigation bar with 'My Information' and 'Leave Administration'. Below this, a 'Leave Cases' section features a 'Show' dropdown set to 'LV-Open Cases' and a 'Time Period' dropdown set to 'Current Pay Period'. A 'Refresh' button and a 'Select an Action' dropdown are also present. The main table lists leave cases with columns: Name, Leave Case Status, Leave Category, Leave Reason, Leave Case Code, Leave Frequency, Leave Case Approval Status, Initial Leave Request Date, Leave Start Date, Documents Overdue, New Leave Requests, and Leave End Date. Below the table, two dropdown menus are shown. The first, labeled 'ave Cases', lists options like 'All Home', 'LV-Closed Cases', 'LV-Continuous Cases', 'LV-Intermittent Cases', 'LV-Open and Closed Cases', 'LV-Open Cases' (highlighted), and 'LV-Punchd in during Cont Leave'. The second, labeled 'Show', lists options like 'LV-Open Cases' (highlighted), 'Previous Pay Period', 'Current Pay Period', 'Next Pay Period', 'Previous Schedule Period', 'Current Schedule Period', 'Next Schedule Period', 'After Next Schedule Period', 'Today', 'Yesterday', 'Week to Date', 'Last Week', 'Specific Date', and 'Range of Dates'.

Name	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date
Anderson, Marcia R	Submitted	Personal	Other	POTHER	Intermittent	Pending	1/06/2020	1/10/2020			1/10/2020
Leave, Test 1	Open	Personal Medical Leave	Pregnancy Disability Leave	SFLMAT	Intermittent	Pending	12/12/2019	12/12/2019			
Leave, Test 1	Open	Personal Medical Leave	Illness Injury	SLFILL	Intermittent	Pending	11/15/2019	11/18/2019	▼		
Leave, Test 2	Open	Personal Medical Leave	Illness Injury	SLFILL	Continuous	Approved	8/01/2018	8/01/2018	▼		



# LEAVE – LEAVE CASE ACTIONS

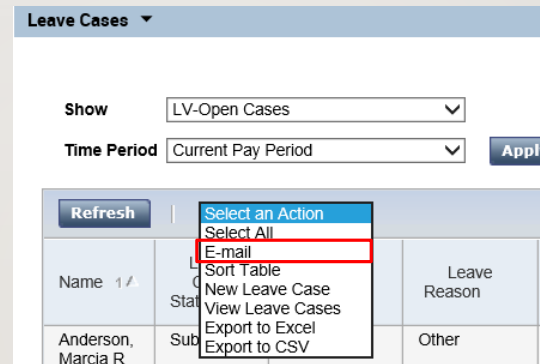
1. Through the Leave Cases interface you can select a particular leave case and through the **Select an Action** drop down you can select what you would like to do
2. Select All, will select all leave cases, and allow you to perform further action on all the leave cases shown by the filters you've selected

The screenshot shows the 'Leave Cases' interface. At the top, there's a header 'Leave Cases' with a dropdown arrow. Below it, there are two filter sections: 'Show' with a dropdown menu set to 'LV-Open Cases', and 'Time Period' with a dropdown menu set to 'Current Pay Period'. An 'Apply' button is to the right of the 'Time Period' dropdown. Below the filters is a table with columns: 'Name', 'Leave Case Status', 'Leave Reason', and 'Case Number'. The first row shows 'Anderson, Marcia R' under 'Name', 'Sub' under 'Leave Case Status', and 'Other' under 'Leave Reason'. A 'Refresh' button is to the left of the table. A dropdown menu is open over the table, showing the following options: 'Select an Action', 'Select All', 'E-mail', 'Sort Table', 'New Leave Case', 'View Leave Cases', 'Export to Excel', and 'Export to CSV'. The 'Select an Action' option is highlighted with a red border.

Name	Leave Case Status	Leave Reason	Case Number
Anderson, Marcia R	Sub	Other	F

# LEAVE – LEAVE CASE ACTIONS: E-MAIL

E-mail will allow you to send an email to an employee whether you want to remind them of a deadline for document submission or update them on the status of the leave case



The screenshot shows a web application interface for managing leave cases. At the top, there's a 'Leave Cases' dropdown menu. Below it, there are two filter sections: 'Show' with a dropdown set to 'LV-Open Cases' and 'Time Period' with a dropdown set to 'Current Pay Period', followed by an 'Apply' button. Below the filters is a 'Refresh' button and a table. A context menu is open over the table, listing actions: 'Select an Action', 'Select All', 'E-mail' (highlighted with a red box), 'Sort Table', 'New Leave Case', 'View Leave Cases', 'Export to Excel', and 'Export to CSV'. The table has columns for 'Name', 'Status', and 'Leave Reason'. The first row shows 'Anderson, Marcia R' with status 'Sub' and reason 'Other'.

Name	Status	Leave Reason
Anderson, Marcia R	Sub	Other

# LEAVE – LEAVE CASE ACTIONS: SORT TABLE

- I. In order to organize the table, the Sort action will list cases by the default name, the easiest way to do this is by clicking the column you want to sort by. You can choose a column as a primary and secondary sort, then you can determine whether you want the organize it in ascending or descending order by changing the direction of the triangle on the column, also by clicking.

Refresh   Select an Action ▼								
Name 1 ▲	Leave Case Status 2 ▲	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date
Anderson, Marcia R	Submitted	Personal	Other	POTHER	Intermittent	Pending	1/06/2020	1/10/2020
Leave, Test 1	Open	Personal Medical Leave	Pregnancy Disability Leave	SFLMAT	Intermittent	Pending	12/12/2019	12/12/2019
Leave, Test 1	Open	Personal Medical Leave	Illness Injury	SLFILL	Intermittent	Pending	11/15/2019	11/18/2019
Leave, Test 2	Open	Personal Medical Leave	Illness Injury	SLFILL	Continuous	Approved	8/01/2018	8/01/2018

# LEAVE – LEAVE CASE ACTIONS: EXPORT

- I. By using the Export action under Select an Action, you can choose to view all the leave cases and all their information in excel format. The only cases that will be exported are those you've filtered in using the Show and Time Period drop downs

Leave Cases ▾

Show LV-Open Cases ▾

Time Period Current Pay Period ▾ Apply

Refresh | Select an Action

Select All  
E-mail  
Sort Table  
New Leave Case  
View Leave Cases  
**Export to Excel**  
**Export to CSV**

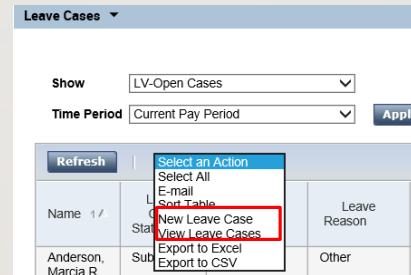
Name	Leave Case Status	Leave Category	Leave Reason
Anderson, Marcia R	Submitted	Other	Other

	A	B	C	D	E	F	G	H	I	J	K	L
	Name	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date
1												
2		Submitted	Personal	Other	POTHER	Intermittent	Pending	1/6/2020	1/10/2020			1/10/2020
3	Leave, Test 1	Open	Personal Medical L	Pregnancy Disab	SFLMAT	Intermittent	Pending	12/12/2019	12/12/2019			
4	Leave, Test 1	Open	Personal Medical L	Illness Injury	SLFILL	Intermittent	Pending	11/15/2019	11/18/2019	X		
5	Leave, Test 2	Open	Personal Medical L	Illness Injury	SLFILL	Continuous	Approved	8/1/2018	8/1/2018	X		
6	Persona, Employee	Open	Caregiver Leave	Child	FCHILD	Continuous	Approved	1/8/2020	2/1/2020			
7	Persona, Employee	Submitted	Personal Medical L	Organ Donor	Organ	Continuous	Pending	1/9/2020	1/27/2020			3/1/2020
8	Persona, Employee	Retracted	Personal Medical L	Illness Injury	SLFILL	Continuous	Pending	11/18/2019	11/18/2019			12/30/2020
9	Persona, Employee	Submitted	Personal Medical L	Illness Injury	SLFILL	Continuous	Pending	12/12/2019	12/16/2019			
10	Unit Test, Leave	Open	Bonding Leave	Baby Bonding	FBABYB	Continuous	Pending	1/8/2020	3/27/2020			4/27/2020
11	Unit Test, Leave	Open	Personal Medical L	Maternity	MAT	Continuous	Pending	1/8/2020	1/8/2020			3/26/2020
12	Unit Test, Leave	Open	Personal	Volunteer Firefig	Volunt	Continuous	Pending	12/12/2019	12/12/2019			
13	Unit Test, Leave	Open	Personal Medical L	Illness Injury	SLFILL	Continuous	Approved	1/8/2020	12/2/2019			1/2/2020
14	Unit Test, Leave	Open	Personal Medical L	Illness Injury	SLFILL	Intermittent	Pending	1/8/2020	1/1/2020			12/31/2020

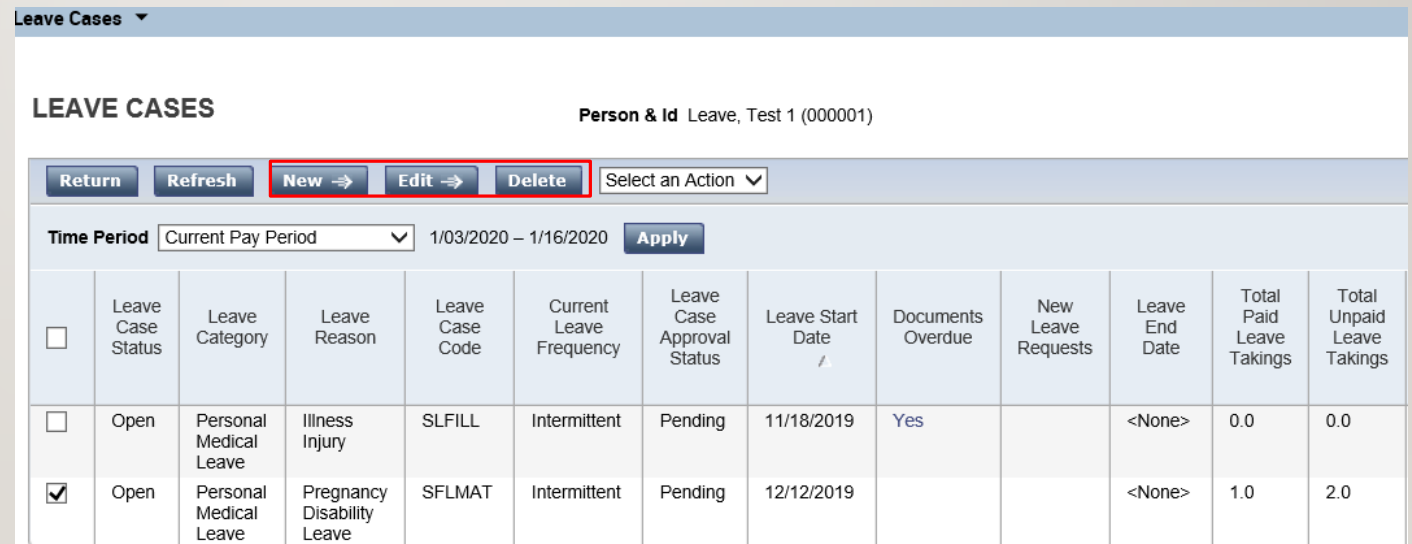


# LEAVE – LEAVE CASE ACTIONS:VIEW LEAVE CASES

1. After selecting the View Leave Cases menu item on the Actions drop down you will be prompted to the leave cases interface
2. From this list of leave cases you can use the menu to **Create**, **Edit**, or **Delete** the leave case



The screenshot shows a 'Leave Cases' dropdown menu. The menu is open, displaying a list of actions: 'Select an Action', 'Select All', 'E-mail', 'Sort Table', 'New Leave Case', 'View Leave Cases' (highlighted with a red box), 'Export to Excel', and 'Export to CSV'. The background shows a table with columns for Name, Status, Leave Reason, and Leave Case Code.



The screenshot shows the 'Leave Cases' interface. At the top, there is a 'Leave Cases' dropdown menu. Below it, the title 'LEAVE CASES' is displayed, followed by 'Person & Id Leave, Test 1 (000001)'. The interface includes a toolbar with buttons: 'Return', 'Refresh', 'New' (highlighted with a red box), 'Edit' (highlighted with a red box), and 'Delete' (highlighted with a red box). There is also a 'Select an Action' dropdown menu. Below the toolbar, there is a 'Time Period' section with a dropdown menu set to 'Current Pay Period' and a date range '1/03/2020 – 1/16/2020' with an 'Apply' button. The main part of the interface is a table with the following columns: Leave Case Status, Leave Category, Leave Reason, Leave Case Code, Current Leave Frequency, Leave Case Approval Status, Leave Start Date, Documents Overdue, New Leave Requests, Leave End Date, Total Paid Leave Takings, and Total Unpaid Leave Takings. The table contains two rows of data. The first row has a checkbox, 'Open', 'Personal Medical Leave', 'Illness Injury', 'SLFILL', 'Intermittent', 'Pending', '11/18/2019', 'Yes', an empty cell, '<None>', '0.0', and '0.0'. The second row has a checked checkbox, 'Open', 'Personal Medical Leave', 'Pregnancy Disability Leave', 'SFLMAT', 'Intermittent', 'Pending', '12/12/2019', an empty cell, an empty cell, '<None>', '1.0', and '2.0'.

	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Current Leave Frequency	Leave Case Approval Status	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date	Total Paid Leave Takings	Total Unpaid Leave Takings
<input type="checkbox"/>	Open	Personal Medical Leave	Illness Injury	SLFILL	Intermittent	Pending	11/18/2019	Yes		<None>	0.0	0.0
<input checked="" type="checkbox"/>	Open	Personal Medical Leave	Pregnancy Disability Leave	SFLMAT	Intermittent	Pending	12/12/2019			<None>	1.0	2.0

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE SUMMARY

1. The first step in creating a new leave case or editing an existing one is filling in the case summary, here you fill in the time frame, category status, leave code, and effective date. Mandatory fields are marked with an asterisk with optional fields like details and temporary mailing address there if necessary.
2. Only Case Summary, Additional Information, Eligibility & Leave Types, Leave Rules, and Takings List are required, the rest are all prepopulated or optional.

The screenshot displays the 'LEAVE CASE EDITOR' interface. At the top, it shows 'Person & Id' as 'Leave, Test 1 (000001)' and 'Leave Case' as 'SFLMAT 12/12/2019 - <None>'. Below this is a navigation bar with tabs: 'GENERAL' (selected), 'LEAVE REQUESTS', 'LEAVE CALENDAR', 'TAKINGS LIST', and 'AUDITS'. On the left side of the 'GENERAL' tab, there is a list of sections: 'Case Summary' (selected), 'Additional Information', 'Eligibility & Leave Types', 'Documents', 'Document Status', 'Frequency & Duration', 'Notifications', 'Employment Status', and 'Leave Rules'. The main content area is titled 'CASE SUMMARY' and contains several fields. At the top right, there are columns for 'Paid Leave' (1.0) and 'Unpaid Leave' (2.0). Below this, 'Total Committed Takings' is shown as 1.0. The 'Leave Start Date' is set to 12/12/2019, and the 'Initial Leave Request Date' is also 12/12/2019. The 'Leave End Date' is currently empty. The 'Requested Daily Leave Hours' is set to 'Same each day/Variable' with a sub-option of 'Same hours each day'. Below these, 'Case Status' is 'Open' and 'Effective Date' is 12/12/2019. The 'Leave Category' is 'Personal Medical Leave' and the 'Reason' is 'Pregnancy Disability Leave'. The 'Leave Frequency' is 'Intermittent' and the 'Effective Date' is 12/12/2019. The 'Leave Case Code' is 'SFLMAT'. The 'Case Approval Status' is 'Pending' and the 'Effective Date' is 12/12/2019. At the bottom, there are sections for 'Temporary Mailing Address' and 'Details', both of which are currently empty.

CASE SUMMARY	
* Leave Start Date	12/12/2019
Leave End Date	
* Initial Leave Request Date	12/12/2019
Requested Daily Leave Hours	Same each day/Variable Same hours each day
Case Status	Open
* Leave Category	Personal Medical Leave
Reason	Pregnancy Disability Leave
Leave Frequency	Intermittent
* Effective Date	12/12/2019
* Leave Case Code	SFLMAT
Case Approval Status	Pending
Effective Date	12/12/2019
Temporary Mailing Address	
Details	

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE

## ADDITIONAL INFORMATION

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The additional information tab is optional and can be filled in to provide clarity on certain leave cases

→ Case Summary

→ Additional Information

→ Eligibility & Leave Types

→ Documents

→ Document Status

→ Frequency & Duration

→ Notifications

→ Employment Status

→ Leave Rules

ADDITIONAL INFORMATION

General Notes

Eligibility Notes

Doctor Name

Disability Claim Number

Save & Next →

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE

## ELIGIBILITY AND LEAVE TYPES

1. Eligibility & Leave Types gives you information on which paid and unpaid leave types the employee is eligible for. Using the Leave Balances as of date and clicking Check Eligibility will give you a list of all the potential leave types.
2. Bypass eligibility check will allow you to create a leave case using a type the employee may not be eligible for: This will be a requirement for creating a leave case
3. Grant leave will not be used

→ Case Summary

→ Additional Information

→ Eligibility & Leave Types

→ Documents

→ Document Status

→ Frequency & Duration

→ Notifications

→ Employment Status

→ Leave Rules

ELIGIBILITY & LEAVE TYPES

Leave Start Date 12/12/2019

Leave End Date <None>

Initial Leave Request Date 12/12/2019

Employee is eligible for the following Leave Type(s) as of Leave Start Date:

Check Eligibility →

\* Leave Balances as of 1/16/2020 

Apply

Bypass Eligibility Check →

Grant Leave →

Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
<input checked="" type="checkbox"/>	LV-Comp	0.0	0.0
<input checked="" type="checkbox"/>	LV-Holiday Comp	0.0	7.5
<input checked="" type="checkbox"/>	LV-Personal	0.0	24.0
<input checked="" type="checkbox"/>	LV-Sick	1.0	191.0
<input checked="" type="checkbox"/>	LV-Sick Family	0.0	160.0
<input checked="" type="checkbox"/>	LV-Unpaid	0.0	998.0
<input checked="" type="checkbox"/>	LV-Vacation	0.0	250.0

Use in this Leave Case	Unpaid Leave Type	Committed Hours	Available Balance
<input checked="" type="checkbox"/>	CTFMLA Self	1.0	639.0
<input checked="" type="checkbox"/>	Non-CTFMLA	0.0	998.0
<input checked="" type="checkbox"/>	Non-FMLA Pregnancy Disability Leave	1.0	998.0
<input checked="" type="checkbox"/>	Non-SEBAC	0.0	998.0
<input checked="" type="checkbox"/>	SEBAC	0.0	960.0

Save & Next →



# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE ELIGIBILITY AND LEAVE TYPES

When creating a leave case in Kronos you can use the table pictured on the right as reference. It shows the Kronos equivalent to the TRC codes you are familiar with and will assist with the eligibility check

Table: Kronos Pay Code to TRC to earn code mapping table

Kronos Category	Kronos Reason	Kronos Pay Codes	Core-CT TRC
Military Family Leave	Military Caregiver Covered Service Member	LV-Comp Used + LV-FMLAMIL Tracking + LV-CTFMLAMIL Tracking	CCAFB
Military Family Leave	Military Qualifying Exigency	LV-Comp Used + LV-FMLAMIL Tracking + LV-CTFMLAMIL Tracking	CCAFE
Bonding Leave	Placement of Foster Child	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCB
Bonding Leave	Birth of child	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCB
Bonding Leave	Baby Bonding	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCB
Bonding Leave	Adoption	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCB
Caregiver Leave	Paternity	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCB
Caregiver Leave	Child	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCCC
Caregiver Leave	Parent	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCCP
Caregiver Leave	Parent In Law	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCCP
Caregiver Leave	Spouse	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCCS
Caregiver Leave	Partner	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCCS
Personal Medical Leave	Illness Injury	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCMC
Personal Medical Leave	Maternity	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCMCB
Personal	Workers Comp	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCWC
Personal	Workers Comp	LV-Comp Used + LV-FMLA Tracking + LV-CTFMLA Tracking	CCWCS

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE

## LEAVE RULES

---

Using the Leave Rules section select the appropriate Leave Rule and the Effective Date. Click Save when completed

Select the appropriate leave type based on the paid and unpaid leave codes displayed next to it

**LEAVE RULES**

**Leave Start Date** 12/12/2019

**Leave End Date** <None>

**Leave Frequency** Intermittent as of 12/12/2019

**Initial Leave Request Date** 12/12/2019

		Leave Rule	* Effective Date
<input type="radio"/>		Pregnancy Disability Leave Biological Mother 	12/12/2019 

Save

Paid Leave Types	Unpaid Leave Types
LV-Sick, LV-Unpaid	CTFMLA Self, FMLA Federal Self, Non-CTFMLA, Non-FMLA Self, Non-SEBAC, SEBAC

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE TAKINGS LISTS

1. After accessing the Takings List you can use the Actions drop down to select what you want to do. Here you would need to Add Projections over a period of time. You also have the option to commit these changes if you're okay with the projection or delete the projection and change the original settings

2. If you select Add projected leave time over long range you will select the data range and then add any additional settings such as excluding weekends and exhausting leaves, then you will enter Hours per day and then Save & Return

1

Leave Cases ▾

LEAVE CASE EDITOR

Person & Id Leave, Test 1 (000001)  
Leave Case SLFILL 11/18/2019 - <None>

GENERAL | LEAVE REQUESTS | LEAVE CALENDAR | **TAKINGS LIST** | AUDITS

Save Save & Return Return Refresh

Select an Action  
Add Projected Leave Time Over Long Range...  
Recalculate Projected Takings...  
Complete Projected Takings...  
Override Projected Leave Time/Takings...  
Commit to Schedule/Timecard...  
Undo Commit...  
Delete Projected Leave Time...  
View Day Detail

Time Period Current Year 1/01/2020 -

<input type="checkbox"/>	Day	Date	Leave Time Amount	LV-Comp	LV-Holiday Comp	Personal	Sick	Unpaid	Self
This table currently contains no data.									

2

ADD PROJECTED LEAVE TIME OVER LONG RANGE

Person & Id Leave, Test 1 (000001)  
Leave Case SLFILL 11/18/2019 - <None>

Save & Return Return Refresh

\* Start Date 1/10/2020

\* End Date 1/10/2020

☐ Exhaust all paid and unpaid leave allowed

☐ Leave takings on scheduled days only

☐ Exclude Saturdays and Sundays

Takings Type Both paid and unpaid takings ▾

\* Hours per Day 8:00 HH.hh

☐ Full scheduled day ▾

Save & Return →

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE TAKINGS LISTS

1. The projection will look like the image on the right, if the projection is correct you can Commit to schedule and timecard. Otherwise you can Delete Projected Leave Time, recalculate, or override individual leave time/takings
2. If the projected time is in the past commit to timecard, if in the future commit to schedule, you also have the option to commit both at once

<input type="checkbox"/>	Sat	2/01/2020	8.0				8.0		8.0	8.0				
<input type="checkbox"/>	Sun	2/02/2020	8.0				8.0		8.0	8.0				
<input type="checkbox"/>	Mon	2/03/2020	8.0				8.0		8.0	8.0				
<input type="checkbox"/>	Tue	2/04/2020	8.0			7.0	1.0		8.0	8.0				
<input type="checkbox"/>	Wed	2/05/2020	8.0			8.0			8.0	8.0				
<input type="checkbox"/>	Thu	2/06/2020	8.0			8.0			8.0	8.0				
<input type="checkbox"/>	Fri	2/07/2020	8.0			1.0			8.0	8.0				
<input type="checkbox"/>	Sat	2/08/2020	8.0						8.0	8.0				
<input type="checkbox"/>	Sun	2/09/2020	8.0						8.0	8.0				
<input type="checkbox"/>	Mon	2/10/2020	8.0						8.0	8.0				
Committed				0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Projected				0.0	0.0	24.0	201.0	0.0	256.0	256.0	0.0	0.0	0.0	0.0
Total				0.0	0.0	24.0	201.0	0.0	256.0	256.0	0.0	0.0	0.0	0.0
Committed Leave Time			0.0											
Projected Leave Time			256.0											

IDAR

TAKINGS LIST

AUDITS

Select an Action

Add Projected Leave Time Over Long Range...

Recalculate Projected Takings...

Complete Projected Takings...

Override Projected Leave Time/Takings...

Commit to Schedule/Timecard...

Undo Commit...

Delete Projected Leave Time...

View Day Detail

COMMIT TO SCHEDULE/TIMECARD

Person & Id Leave, Test 1 (000001)

Leave Case SLFILL 11/18/2019 - <None>

Save & Return

Return

Refresh

\* Commit End Date 12/31/2020

Takings Type Both paid and unpaid takings

Destination Timecard

Transfer

Save & Return



# LEAVE – LEAVE CASE ACTIONS: OVERRIDING PROJECTED LEAVE TIME

If your projected leave time does not properly apply or needs to be adjusted to more specific values select all days you want to modify. Then undo the commit if committed, and select override projected leave time. Here you will be able to make modifications on a day by day basis

Always commit the leave takings after editing them or creating them


	Day	Date	Leave Time Amount
<input checked="" type="checkbox"/>	Fri	11/08/2019	8:00
<input checked="" type="checkbox"/>	Sat	11/09/2019	8:00
<input checked="" type="checkbox"/>	Sun	11/10/2019	8:00

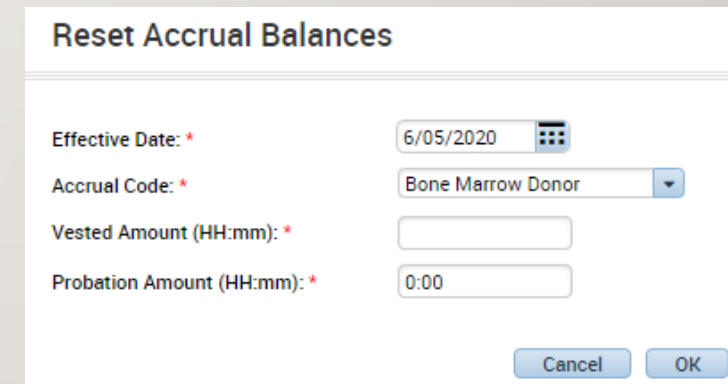
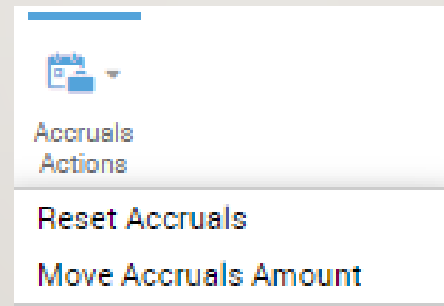
- Select an Action
- Add Projected Leave Time Over Long Range...
- Recalculate Projected Takings
- Complete Projected Takings...
- Override Projected Leave Time/Takings...
- Commit to Schedule/Timecard...
- Undo Commit...
- Delete Projected Leave Time...
- View Day Detail

Paid Leave	LV-Sick
8:00	8:00
8:00	8:00
8:00	8:00

# LEAVE – LEAVE CASE ACTIONS: RESETTING ACCRUALS

- When performing a leave case override, if you receive the following notification it may mean your accruals are out of sync with Core CT
- Validate your accruals in Core and if they are not in sync you will need to reset your accruals to match those in Core CT as shown

 This edit cannot be made. Sick Leave Bank balance on 6/07/2020 is -8:00 (overdrawn by 8:00). Maximum overdraw is 0:00. LV-CTFMLA balance on 6/07/2020 is -8:00 (overdrawn by 8:00). Maximum overdraw is 0:00. LV-FMLA balance on 6/07/2020 is -8:00 (overdrawn by 8:00). Maximum overdraw is 0:00.

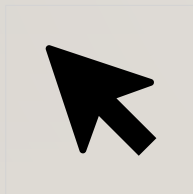
A screenshot of a 'Reset Accrual Balances' form. The form has the following fields:

- Effective Date: \* 6/05/2020 (with a calendar icon)
- Accrual Code: \* Bone Marrow Donor (with a dropdown arrow)
- Vested Amount (HH:mm): \* (empty text box)
- Probation Amount (HH:mm): \* 0:00 (text box)

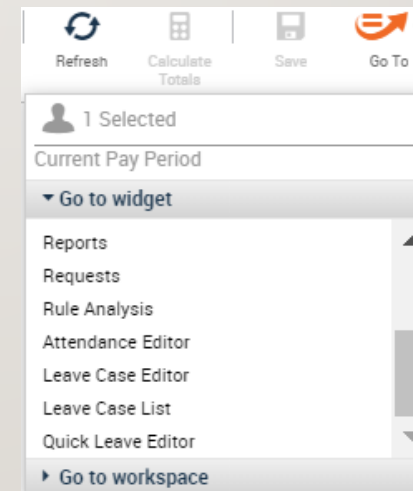
At the bottom right, there are 'Cancel' and 'OK' buttons.

# LEAVE – LEAVE CASE ACTIONS: INTERMITTENT LEAVE CASE

1. In order to create an intermittent leave case follow the same previous steps but select the Intermittent leave frequency
2. Once created, navigate to the employee's timecard and select quick leave editor, here you can input any future takings on a daily basis
3. Once edited, navigate to leave case editor and validate the leave distribution, if incorrect perform an override as shown on the slide below (click/slide 29)



Reason	Illness Injury ▼
Leave Frequency	Intermittent ▼
* Leave Case Code	SLFILL

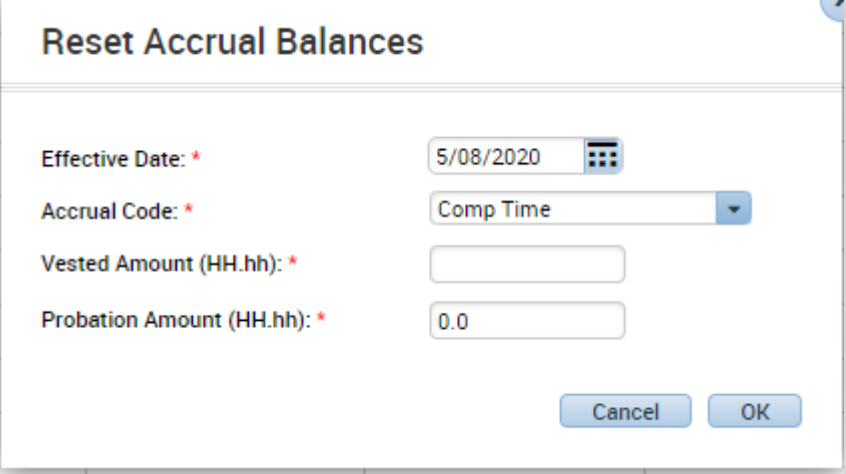


# LEAVE – THINGS TO CONSIDER

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## Things to consider in order to keep Kronos and Core CT in sync

- Keeping comp plans balances in sync through accrual resets and updates
- When adding a new employee in Core CT, add the employee, wait a day and then validate their information in Kronos
- For Transfers may need to update the accrual balances to remain in sync with Core CT



The screenshot shows a 'Reset Accrual Balances' dialog box. It contains the following fields and controls:

- Effective Date:** A date field with a calendar icon, showing '5/08/2020'.
- Accrual Code:** A dropdown menu showing 'Comp Time'.
- Vested Amount (HH.hh):** An empty text input field.
- Probation Amount (HH.hh):** A text input field containing '0.0'.
- Buttons:** 'Cancel' and 'OK' buttons at the bottom right.



# DEMO

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Now we will cover a demo of inputting a sick family leave case into Kronos, example shown in Leave Manager Exercise guide

# DEMO – LEAVE EXERCISE I

PLEASE REFER TO THE HR  
LEAVE EXERCISE GUIDE  
IN ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

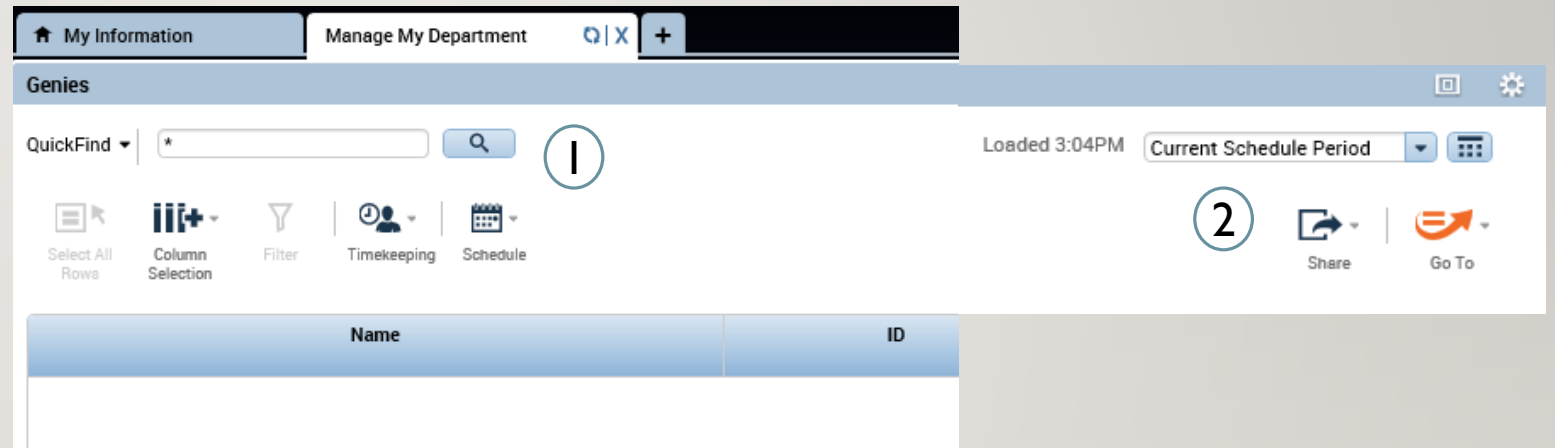
# FINDING YOUR TEAM

---



# FINDING YOUR TEAM – SEARCHING FOR AN EMPLOYEE REPORT

1. Under the Manage My Department interface use the default QuickFind Genie and search for your employee. Type in the name of your employee or begin the search with '\*' to search employees with their named ending in the following letters, end your search with '\*' to find employees whose names start with the entered letters. Searching '\*' will return every employee
2. This area allows you to change the desired timeframe, or share the employee information by exporting it to excel or csv. Go To allows you to select an employee and transition to the different Management widgets that will covered





# FINDING YOUR TEAM – WORKING WITH GENIES

1. Under the Manage My Department interface use the default QuickFind Genie and search for your employee. Type in the name of your employee or begin the search with '\*' to search employees with their named ending in the following letters, end your search with '\*' to find employees whose names start with the entered letters. Searching '\*' will return every employee
2. This area allows you to change the desired timeframe, or share the employee information by exporting it to excel or csv. Go To allows you to select an employee and transition to the different Management widgets that will covered

The screenshot displays the 'Manage My Department' interface. At the top, there are tabs for 'My Information' and 'Manage My Department'. Below the tabs, a 'Genies' section is highlighted with a red box, containing a 'QuickFind' dropdown menu and a search input field with an asterisk (\*). To the right of the search bar is a circular icon with the letter 'I'. Below the search bar, there is a toolbar with icons for 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', and 'Schedule'. To the right of the toolbar, there are buttons for 'Share' and 'Go To'. Below the toolbar, there is a table with two columns: 'Name' and 'ID'. Below the table, there is a 'Search Genie' dropdown menu with a list of options: 'QuickFind', 'Attendance', 'Leave Cases', 'Leave Hours', 'Pay Period Close', 'Reconcile Timecard', and 'All WTK Exceptions'. To the right of the 'Search Genie' dropdown, there is a circular icon with the number '2' and a list of options: 'Count All WTK Exceptions', 'Approve Timecards', and 'Search Genie' (which is highlighted in orange).

# FINDING YOUR TEAM – WORKING WITH GENIES

1. Leave hours shows you the details of all paid and unpaid committed and uncommitted hours
2. Leave cases gives you a broader view of all the leave cases and dates, including documents required and frequency

Genies

Leave Hours ▾

Select All Rows

Column Selection

Filter

People

Timekeeping

Approval

Schedule

Absence

1

Name	Leave Case Status	Leave Case Code	Leave St... Date	Leave E... Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/Committed Paid Leave Time	Last Date/Committed Unpaid Leave Time	Total Paid Le... Takings	Total Unpaid Leave Takings
------	-------------------	-----------------	------------------	-----------------	---------------------------	-----------------------------	-------------------------------------	---------------------------------------	--------------------------	----------------------------

Genies

Leave Cases ▾

Select All Rows

Column Selection

Filter

People

Timekeeping

Approval

Schedule

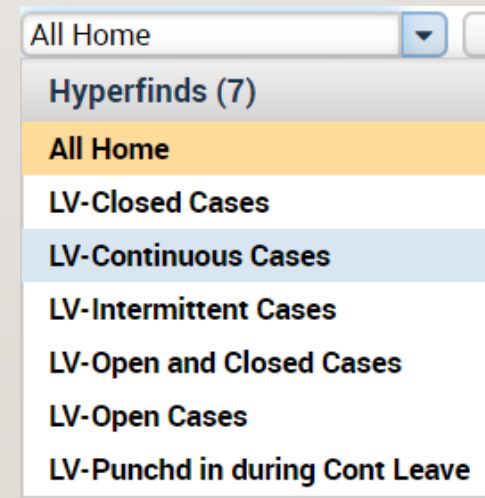
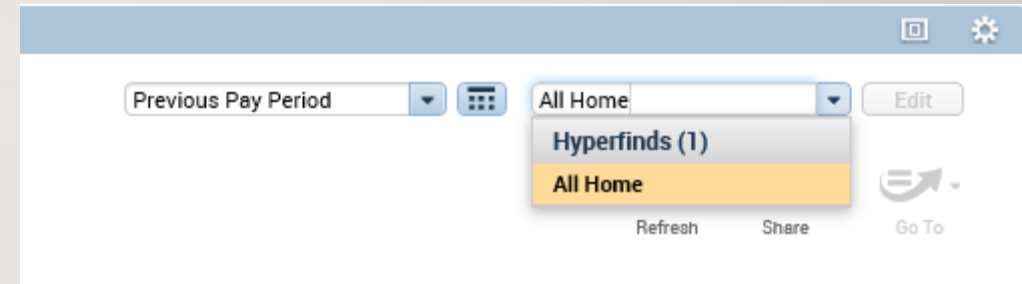
Absence

2

Name	Leave Case Status	Leave Category	Leave Rea...	Leave Case Code	Leave Frequen...	Leave Case Approval Stat...	Initial Leave Request Date	Leave S... Date	Docume... Overdue	New Lea... Request	Leave End Date
------	-------------------	----------------	--------------	-----------------	------------------	-----------------------------	----------------------------	-----------------	-------------------	--------------------	----------------

# FINDING YOUR TEAM – WORKING WITH HYPERFINDS

1. Under the certain widgets or genies you'll see the second drop down next to the timeframe selection. Using this drop down you can select standard hyperfinds that will help you simplify your search.
2. These are All Home, which is every employee in your sphere of influence, and then the following leave conditions
3. Hyperfinds and time period adjustments can be used on most widgets



# FINDING YOUR TEAM – EXERCISE 2

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT



# TIMECARDS

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# TIMECARDS – EDITING PUNCHES

1. Using the QuickFind Genie under Manage My Department search for the employee you want to see, then double click their name to open their timecard
2. Once in the timecard you can adjust the view change the timeframe and begin editing

My Information

Manage My Department

Schedules

Timecards

+

Genies

QuickFind

\*lopez, steven

🔍

1

Select All Rows

Column Selection

Filter

Timekeeping

Schedule

Name	ID	
Lopez, Steven	200037	Sample/-/-/-/-/-/-/-/-

Timecards

Lopez, Steven

1 of 1

200037

2

View

		Date	Schedule	Pay Code	Amount
+	×	Fri 1/03			
+	×	Sat 1/04			
+	×	Sun 1/05			
+	×	Mon 1/06			
+	×	Tue 1/07			

# TIMECARDS – EDITING PUNCHES

1. Once in the timecard, exceptions will be highlighted such as a missed in/out punch as shown on the right
2. Select the desired cell and enter the corrected time, hover over any exception to get an explanation of what the exception is

Timecards

Lopez, Steven

1 of 1

200037

View

		Date	Schedule	Pay Code	Amount	In	Transfer	Out
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Fri 1/03				<div><div></div>8:00AM</div>		
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Sat 1/04						
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Sun 1/05						
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Mon 1/06				<div><div></div>8:00AM</div>		<div>12:00PM</div>

# TIMECARDS – ADDING COMMENTS

1. By default entered time will follow the Pay Rule that has been assigned to you and you will not need to enter pay codes for regular time/OT/ or Holidays
2. Once you select **Comments** choose Explanation from the drop down and then add the desired comment

The image shows two screenshots from a timecard system. The top screenshot is the 'Punch Actions' dialog box, which contains fields for Date (1/03/2020), Time (8:00AM), Rounded Time (1/03/2020 8:00AM GMT-05:00), Override (In Punch), Time Zone ((GMT -05:00) Eastern Time (USA; Canada)), Exceptions (Unscheduled), Last Edit Date (1/08/2020), and Edit Made By (Persons, Timekeeper). At the bottom, there are four icons: 'Mark As Reviewed' (checkmark), 'Edit' (pencil), 'Comments' (speech bubble, circled in red), and 'Justify Exception' (star). The bottom screenshot is the 'Comment' dialog box, which has a title bar 'Comment' and a section 'Comments (1)'. It contains a dropdown menu for 'Explanation' and a text input field for 'Type a note (optional)'. There is an 'Add' button and an 'Add another note' link. At the bottom are 'Cancel' and 'OK' buttons. A circled '2' is next to the 'Comments (1)' section.



# TIMECARD — EXERCISE 3

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – EDITING PAY CODES

1. By default entered time will follow the Pay Rule that has been assigned to you and you will not need to enter pay codes for regular time/OT/ or Holidays
2. Pay codes will need to be entered for exceptional situations such as the employee being unable to submit a leave/time off request. In the example on the right there was a delayed entry so you would enter the employee timecards and set the delayed time by entering the Amount and selecting Governor Granted Time Off

Genies

QuickFind ▾ \*Lopez, steven 🔍

Select All Rows Column Selection Filter Timekeeping Schedule

1





Name	ID ▲	Primary Labor Account	Pay Rule
Lopez, Steven	200037	Sample/-/-/-/-/-/-	02 FT NSD STD 8

		Date	Schedule	Pay Code	Amount
+	×	Fri 1/03			
+	×	Sat 1/04		2	
+	×	Sun 1/05			
+	×	Mon 1/06			
+	×	Tue 1/07		Governor Granted Ti...	2.0

# TIMECARDS – ADDING ROWS

1. Click on the ‘+’ to add a new row to a day.  
This can be done if an employee took a couple hours off or if there’s a delayed entry. Pay codes and regular scheduled hours need to be entered on different rows.

1

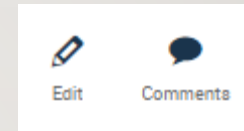
		Tue 1/07		Governor Granted Ti...	2.0
					

2. Once you enter the pay code for the time off and the regular hours worked the time will be automatically compiled on the right, you can see the sum of hours under the Daily column.

2

Shift	Daily
8.5	8.5
6.0	8.0

# TIMECARDS – OVERRIDES AND CANCELLATIONS



1. Right clicking on a punch and selecting Edit, allows you to set an override, such as setting a new shift or adding a break
2. You can also cancel deductions, in scenarios where employees did not take a lunch because they had to continue working as shown here

**Punch**

Date: 11/04/2019

Time (h:mm) \*: 7:00AM

Rounded Time: 11/04/2019 7:00AM GMT-05:00

Override: In Punch

Time Zone: <None>

Cancel Deduction: In Punch

Exceptions: Out Punch

Comments: New Shift

30 Min Break Rule

45 Min Break Rule

60 Min Break Rule

**Punch**

Date: 11/04/2019

Time (h:mm) \*: 7:00AM

Rounded Time: 11/04/2019 7:00AM GMT-05:00

Override: In Punch

Time Zone: (GMT -05:00) Eastern Time (USA; Canada)

Cancel Deduction: Holiday Bonus AOC 0hrs

Exceptions: KGS Good Holiday Bonus 7.5hrs

Comments: Lunch Deduct 30 Min, 0 Hrs Work

Lunch Deduct 30 Min, 6 Hrs Work

Lunch Deduct 30 Min, Swap

Lunch Deduct 45 Min, 0 Hrs Work

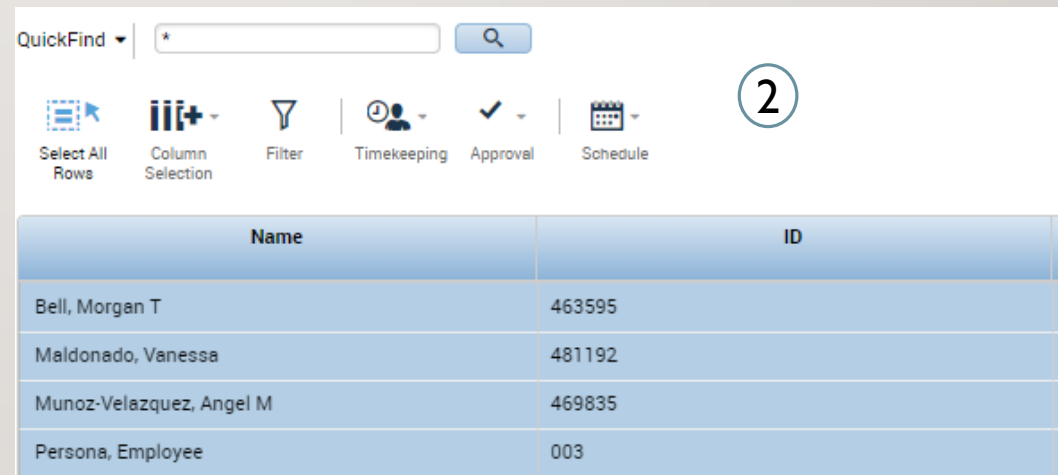
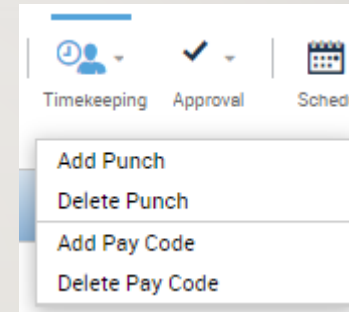


# TIMECARD — EXERCISE 4 & 5

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – GROUP EDITS

1. You also have options to add a punch or a pay code to a group of people
2. All you would need to do is select the employees you want to modify and choose then add in the punch or pay code. This can be useful in the LWGOV scenario to avoid having to manually add in every pay code



A screenshot of a software interface showing a table of employee data. The table has two columns: 'Name' and 'ID'. The table contains four rows of data. Above the table, there is a search bar labeled 'QuickFind' and a search icon. To the left of the table, there are icons for 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', 'Approval', and 'Schedule'. A circled '2' is placed to the right of the table.

Name	ID
Bell, Morgan T	463595
Maldonado, Vanessa	481192
Munoz-Velazquez, Angel M	469835
Persona, Employee	003

# TIMECARD — EXERCISE 6 & 7

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – TRANSFERS

1. On the timecard between the in and out punches you can choose the transfer drop down, from there you can choose previously chosen work rules/labor accounts or search for an unused one
2. Labor Account Transfer: this can be done if you are working at a different location for a day or working a different position you want to charge to that different location
3. Work rule transfer: You get called in and there's a different pay rule for being called in, you would do a work rule transfer and enter the pay rule that should be applied to you for that day  
Ex: Nurses being called in for an hour and a half with the pay rule of being paid a minimum of four hours for call ins.

In	Transfer	Out
8:00AM	<input type="text" value="//DCF9111111000100"/>	3:00PM

**Transfer**

**Transfer**

Name	Lopez, Steven	
Job		
Labor Account	/////	
Work Rule	12 FT OT40 SDE3 DCF	

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

**Add Labor Account** Clear All

Agency-Dept...	<input type="text"/>	Employee ID-E...	<input type="text"/>
Location:	<input type="text"/>	Supervisor:	<input type="text"/>
Combo Code:	<input type="text"/>	Job:	<input type="text"/>
Override Reas...	<input type="text"/>		

**Transfer**

Name	Lopez, Steven	
Job		
Labor Account	/////	
Work Rule	12 FT OT40 SDE3 DCF	

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

**Add Work Rule**

01 EX

02a Civilian Managers

02b Sworn Managers

02 FT CT40 NSD

02 FT NSD

02 PT NSD

03 FT CT40 NSD

03 FT OT40 NSD

04 No OT NSD Other

05 NP-1 Holiday Not Required



# TIMECARD — EXERCISE 8

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS – LABOR ACCOUNT TRANSFERS

1. On the timecard between the in and out punches you can choose the transfer drop down, from there you can choose previously chosen work rules/labor accounts or search for an unused one
2. Labor Account Transfer: this can be done if you are working at a different location for a day or working a different position you want to charge to that different location

The screenshot displays the 'Transfer' interface for labor account transfers. The top section shows a timecard row with 'In' (8:00AM), 'Transfer' (dropdown menu), and 'Out' (3:00PM). A circled '1' points to the 'Transfer' dropdown. Below this is a 'Transfer' modal window. The modal shows employee details: Name (Lopez, Steven), Job (/////), Labor Account (/////), and Work Rule (12 FT OT40 SDE3 DCF). A circled '2' points to the 'Labor Account' tab. Below the tabs is an 'Add Labor Account' section with fields for Agency-Dept, Location, Combo Code, Override Reas, Employee ID-E, Supervisor, and Job. A 'Clear All' link is at the top right of this section. At the bottom are 'Cancel' and 'Apply' buttons.

# TIMECARD — EXERCISE 9

PLEASE REFER TO THE  
TIMEKEEPER EXERCISE  
GUIDE IN ORDER TO  
PRACTICE THE PREVIOUS  
CONCEPT

# TIMECARDS –WORK RULE TRANSFERS

Work rule transfer: You get called in and there's a different pay rule for being called in, you would do a work rule transfer and enter the pay rule that should be applied to you for that day

**Transfer**

Name	Lopez, Steven
Job	
Labor Account	//////
Work Rule	12 FT OT40 SDE3 DCF

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

**Add Work Rule**

01 EX

02a Civilian Managers

02b Sworn Managers

02 FT CT40 NSD

02 FT NSD

02 PT NSD

03 FT CT40 NSD

03 FT OT40 NSD

04 No OT NSD Other

05 NP-1 Holiday Not Required

3



# TIMECARD — EXERCISE 10

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CONCEPT

# TIMECARDS – APPROVALS

1. On the desired employees Timecard select Approve Timecard and then select Approve Timecard from the dropdown
2. Once the Timecard is approved, every cell will turn yellow, become un-editable, and a banner will show up with information on your approval, you can also Remove Timecard Approval using the same button and the cells will turn white again

**Timecards**

Persona, Employee 1 of 1 003

View **Approve Timecard**

Approve Timecard  
Remove Timecard Approval

			Pay Code	Amount
+	x	Fri 1/03	8:00AM-4:00PM	
+	x	Sat 1/04		
+	x	Sun 1/05		
+	x	Mon 1/06	8:00AM-4:00PM	

**Timecards**

**Information** Timecard Approved by 002 1/09/2020 3:44PM

Persona, Employee 1 of 1 003

View **Approve Timecard**

		Date	Schedule	Pay Code	Amount
+	x	Fri 1/03	8:00AM-4:00PM		
+	x	Sat 1/04			
+	x	Sun 1/05			
+	x	Mon 1/06	8:00AM-4:00PM		

# TIMECARDS – AUDITS

I

1. On the desired employees Timecard select Approve Timecard and then select Approve Timecard from the dropdown
2. Once the Timecard is approved, every cell will turn yellow, become un-editable, and a banner will show up with information on your approval, you can also Remove Timecard Approval using the same button and the cells will turn white again

Audits

Category: Audits Type of Edit: All

Lopez, Steven 1 of 1 200037

Date	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Include in Totals	Effective Date	Comment
1/03/2020	8:00AM	Add Punch					In Punch			
1/06/2020	12:00PM	Add Punch					Out Punch			

Category: Audits

Type of Edit: All

Comments

Overtime Requests

Signoff and Approval

Moved Amounts

After Sign-Off Audits

Corrections

Activity Event Audits

Day Lock Audits

Schedule Audits

Hours Worked (Add/Edit/...

Duration (Add/Edit/Delete)

Approvals/Sign-offs

Justification (Add/Edit/D...

All Retroactive (Add/Edit...

Retroactive Punch (Add/...

Retroactive Pay Code (A...

Account Approval Detail

Historical Correction (Ad...

2

# TIME OFF

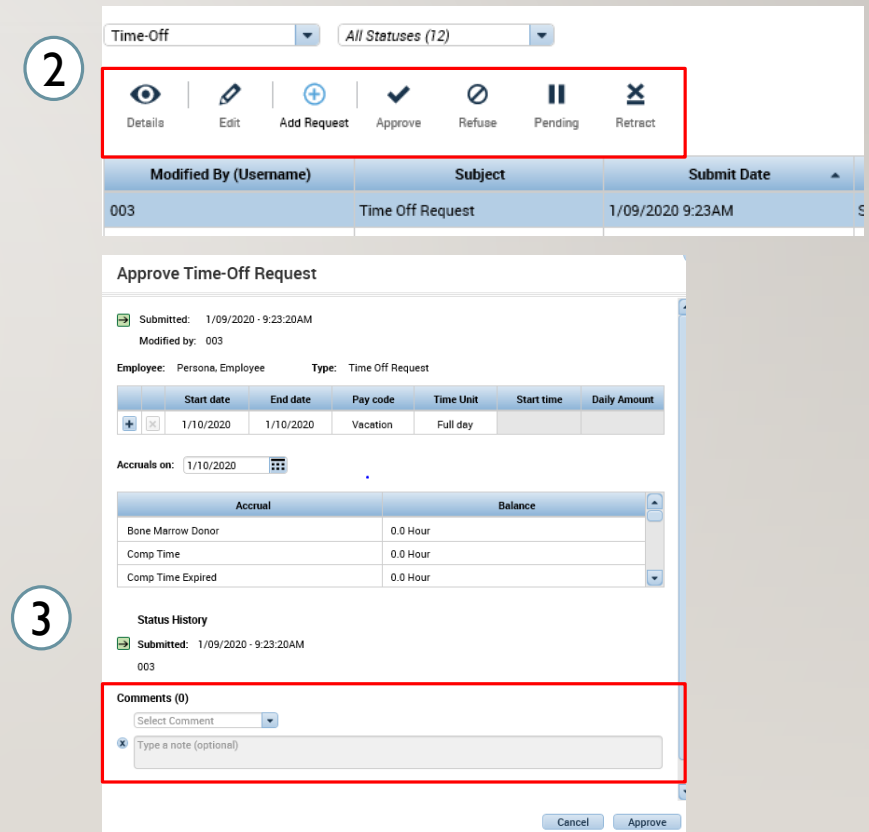
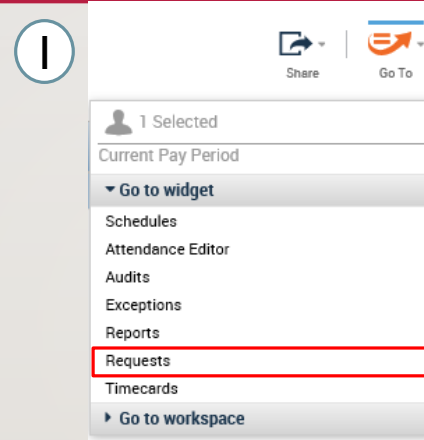
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# TIME OFF – REVIEWING TIME OFF REQUESTS

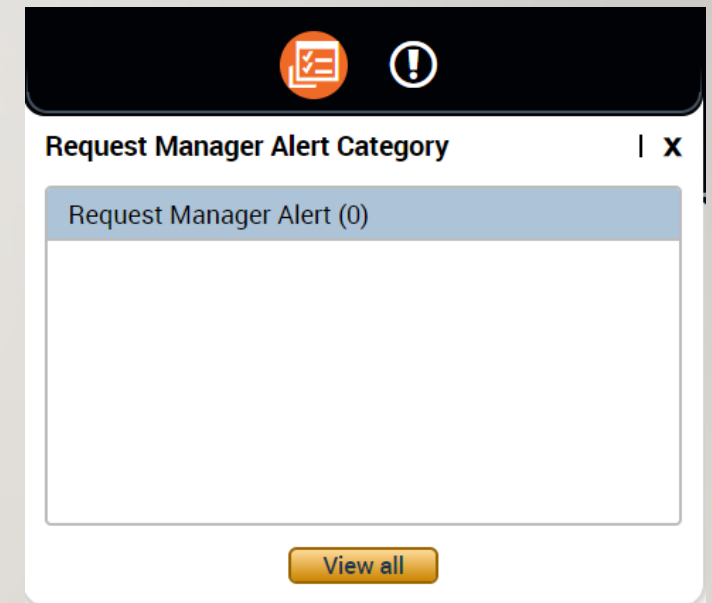
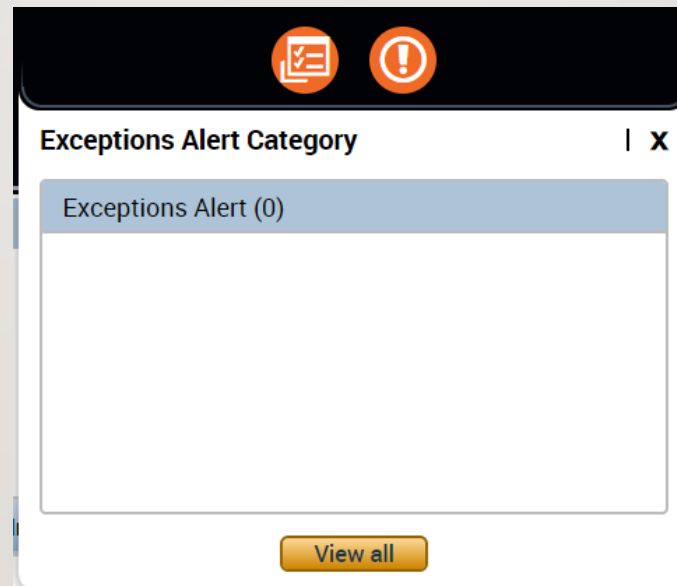
1. After finding the desired employee using the QuickFind, use the Go To button and select **Requests**
2. The following menu will appear with the options to **view, edit, approve, refuse, set as pending, and retract.**
3. Whichever item you choose will lead you to the following menu, where you can decide what to do with the request and then **add an optional comment** to explain the decision.



# TIME OFF – REVIEWING TIME OFF REQUESTS

1 2 3

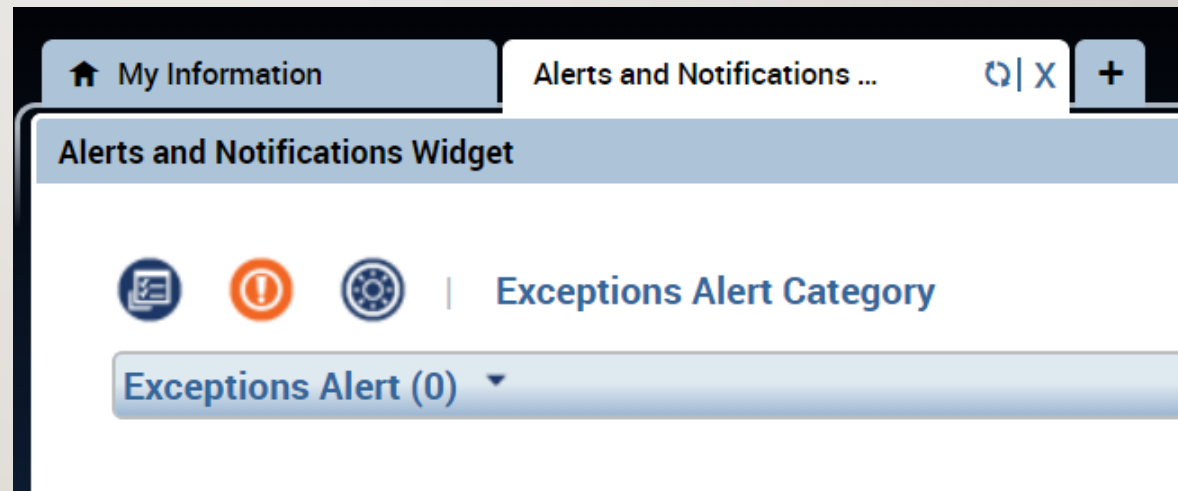
1. At the top of your screen you will have the notification center
2. The exceptions bubble will show you the most recent exception notifications
3. The request manager alert category will show you the most recent request updates



# TIME OFF – REVIEWING TIME OFF REQUESTS

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- I. After clicking **View All** on the notifications center, you will be taken to a list of every exception and every request manager alert



# TIME OFF — EXERCISE II

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CONCEPT



# TIME OFF – TIME OFF REPORT

1. Use the QuickFind to find the employee you want to make changes for. Use the Go To button to access **Reports**
2. Through the reports interface select the Accrual Detail report and select **Run Report**
3. Can be run the same way for any of the listed reports

The screenshot shows the 'Genies' interface. At the top, there's a 'QuickFind' search bar with the text '\*lopez' and a magnifying glass icon. Below the search bar are several icons: 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', and 'Schedule'. To the right of the search bar, there's a 'Go To' button, which is circled with a '1'. Below the 'Go To' button, there's a list of options: 'Schedules', 'Attendance Editor', 'Audits', 'Exceptions', 'Reports', 'Requests', and 'Timecards'. The 'Reports' option is highlighted.

The screenshot shows the 'REPORTS' interface. At the top, there's a 'SELECT REPORTS' button and a 'CHECK REPORT STATUS' button. Below these are several buttons: 'Run Report', 'Refresh', 'Create Favorite', 'Save Favorite', 'Duplicate Favorite', and 'Delete Favorite'. The 'Run Report' button is circled with a '2'. Below the buttons, there's a list of reports: 'Absent Employees (Data)', 'Accrual Balances and Projections (Data)', 'Accrual Debit Activity Summary', 'Accrual Detail (Data)', 'Accruals (Spreadsheet Export)', 'Accrual Summary', 'Attendance Analysis', and 'Attendance Balances'. The 'Accrual Detail (Data)' report is highlighted. To the right of the list, there's a description of the report: 'This report produces raw, unformatted data intended for use with Microsoft Excel. Sim Detail. Displays running accrual balances for each employee. For example, you can see effective dates.' Below the description, there's a 'People' dropdown menu with 'Previously Selected Employee(s)' selected. Below the 'People' dropdown, there's a 'Time Period' section with a 'Range of Dates' dropdown and two date pickers: '1/03/2020' and '1/16/2020'. Below the 'Time Period' section, there's an 'Output Format' dropdown menu with 'Adobe Acrobat Document(.pdf)' selected.

# TIME OFF – TIME OFF REPORT

1. Switch to the Check Report Status tab and select the Accrual Detail report. Select the appropriate report and press View Report.
2. The report will download and show you all your accrual information

REPORTS					
SELECT REPORTS			CHECK REPORT STATUS		
View Report			Refresh Status		
			Delete		
Name			Search		
Report Name			Format		
Accruals (Spreadsheet Export)			xlsx		
Accrual Detail (Data)			pdf		
Accrual Detail (Data)			pdf		
Accrual Debit Activity Summary			pdf		

Accruals (Spreadsheet Export)			Executed On: 1/09/2020 9:55AM		
Data Up to Date: 1/09/2020 9:55AM			Printed For: 006		
Time Period: 1/03/2020 - 1/16/2020			Untotalized Employee Count: 0		
Employee		Reporting Period		Accrual Code	
Name	Start Date	End Date	Name	Unit	Opening Balance
Persona, Employee	1/01/2020	12/31/2020	Bone Marrow Donor	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Expired	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Holiday	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Holiday Expired	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-CTFMLA	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-CTFMLAMIL	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-FMLA	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-FMLAMIL	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-Tracking	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Military Leave Active Duty	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Military Leave Training	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Olympics	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Organ Donor	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Personal	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Red Cross	Hour	0.0

# TIME OFF — EXERCISE 12

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# SCHEDULING

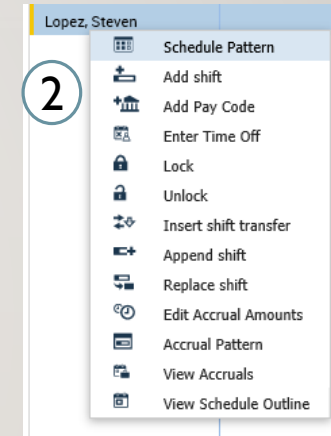
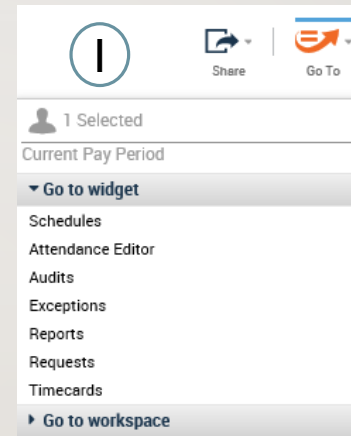
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# SCHEDULING – ADDING A SCHEDULE

1. After selecting an employee using the QuickFind, press the Go To button and select **Schedules**
2. Right click the name of the employee or one of the empty cells on the schedule and select **Add shift**. You can also left click on one of the cells and manually enter in a timeframe.
3. On the add shift window enter the type of shift, the date, the start time, and the end time. Select Apply to save your changes and add the shift to the schedule.

A screenshot of a software interface showing the 'Add Shift' form. The form is titled 'Add Shift' and contains several fields and a table. The 'Assigned to' field is set to 'Lopez, Steven'. The 'Shift Details' field is set to '12:00am-1:00am(1.00h)'. The 'Primary Job' field is set to 'None'. The 'Shift Label' field is empty. The 'Repeat this shift for' field is set to '1' days. A table with columns 'Start Date', 'Type', 'Start Time', 'End Time', 'End Date', 'Duration', 'Job Transfer', 'Labor Level Transfer', and 'Work Rule Transfer' is shown. The first row of the table has the following values: '1/04/2020', 'Regular', '12:00am', '1:00am', '1/04/2020', '1.00', and empty cells for the last three columns. A circled '3' is placed over the form.

# SCHEDULING – EDITING A SCHEDULE

1. Open the Quick Actions icon to pop out all the different things that you can do for a persons schedule. Press Copy/Paste and then select the schedule you want to copy by clicking on it and then click every cell you want to paste it to
2. After selecting a cell you can also select a pay code for that particular day and add it through the schedule. Using the pay code button and the drop down you can select the desired pay code and add it for just that day or include it in a pattern

The screenshot displays the scheduling interface with the Quick Actions menu open. The menu includes options: Assign, Unassign, Shift Transfer, Insert shift template, Comment, Pay Code, Copy / Paste, Delete, Lock / Unlock, Swap, and Quick Actions. The Copy / Paste option is selected, showing a dropdown with the text "Copy / Paste Select an item to copy." Below this, the same menu is shown again, but the Copy / Paste option is not selected. Instead, the Pay Code option is selected, showing a dropdown list of pay codes. The dropdown list includes: Administrative Leave Paid, Agency-Union Picnic or Party, Agency Weather-Emer Closing, Call Back Payment Hours, Career Mobility, CCE - Comp Time Earned, and a message "Displayed 100 of 124. Please narrow down your search." The background shows a schedule grid with columns for "Fri 1/03" and "Sat 1/04", and rows for "Lopez, Steven" and "8:00AM - 4:00PM".

By Employee		12/29 - 1/04	
Name ^	Fri 1/03	Sat 1/04	
Lopez, Steven	8:00AM - 4:00PM		

# SCHEDULING – EDITING A SCHEDULE

1. You can add multiple rows for different occurrences
2. Perform a labor level transfer as previously done (slide 24) for working a different position or for working at a different location or perform a work rule transfer as previously shown (slide 25) for situations where your hours need to be paid out differently than they typically are due to bargaining unit rules.

### Edit Shift

Assigned to  
Lopez, Steven

Shift Details 10:00am-10:00am(0.00h)

Primary Job None

Insert Template ▾

Shift Label

Repeat this shift for days

		Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	×	1/03/2020	Regular	10:00am	4:00pm	1/03/2020	6.00			
+	×	1/03/2020	Regular	8:00am	10:00am	1/03/2020	2.00			

1

Comments (0) [Add Comment](#)

Cancel

Apply

# SCHEDULING – EDITING A SCHEDULE – UNAVAILABLE TIME

1. Any time worked outside of regular scheduled time needs to be scheduled as Unavailable time
2. In order for the interface to perform the right calculations, all time must be entered into the schedule planner. This time must be separated and entered as shown in order for the right overtime to be paid out

1

The 'Add Shift' form includes the following fields and data:

- Assigned to:** Lopez, Steven
- Shift Details:** 3:00pm-5:00pm(2:00h)
- Primary:** (checkbox)
- Insert Template:** (dropdown)
- Shift Label:** (text input)
- Repeat:** (checkbox)

		Start Date	Type	Start Time	End Time	End Date	Duration
+	x	6/02/2020	Unavailable	3:00pm	5:00pm	6/02/2020	2:00

2

The shift selection menu for Tuesday 6/02 displays the following options:

- 5:00AM - 7:00AM (u)
- 7:00AM - 3:00PM
- 3:00PM - 5:00PM (u)



# SCHEDULING – EDITING A SCHEDULE – OFF TIME

1. Time that is not scheduled and needs to have a work rule transfer must use Off Time
2. For employees to be paid correctly, all time and work rules should be entered and scheduled before hand. If the employee is going to be using a work rule or labor account transfer such as when they get On Call, you would need to use Off Time.

1

The screenshot shows the 'Add Shift' form. At the top, it says 'Add Shift'. Below that, 'Assigned to' is set to 'Lopez, Steven'. To the right, 'Shift Details' shows '4:00am-7:00am(3:00h)' and 'Primary'. Below this, there is an 'Insert Template' dropdown and a 'Shift Label' input field. At the bottom, there is a table with columns: Start Date, Type, Start Time, End Time, End Date, and Duration. The table contains one row for 'Off' time on '7/01/2020' from '4:00am' to '7:00am' with a duration of '3:00'.

Start Date	Type	Start Time	End Time	End Date	Duration
7/01/2020	Off	4:00am	7:00am	7/01/2020	3:00

2

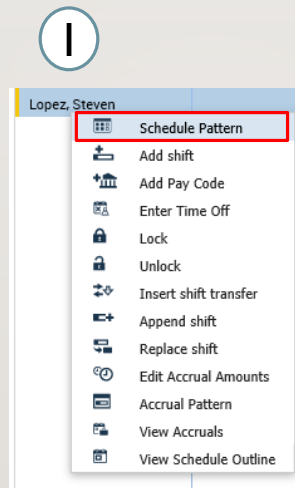
The screenshot shows a shift selection menu for 'Wed 7/01'. It lists three shift options: '4:00AM - 7:00AM (o)', '7:00AM - 3:00PM', and '3:00PM - 11:00PM'.

# SCHEDULES — EXERCISE 13

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# SCHEDULING – ADDING A SCHEDULE PATTERN

1. If instead of selecting insert a shift you select **Schedule Pattern**, you can create a schedule for an employee for these desired period of time and choose how often it would repeat. Start your pattern on a Friday since pay periods start on Fridays.
2. Fill in the anchor date which is the day the pattern begins and should be on a Friday due to the pay period. Then select the start date and the end date or check in the bubble for making the pattern repeat forever. After that you have the option to define the pattern for multiple weeks or for a certain amount of days and then you would fill in the desired schedules.



A screenshot of the 'Schedule Pattern' configuration form. A circled number '2' is in the top right corner. The form includes the following sections:

- Assigned to:** Lopez, Steven Primary job None
- Table Headers:** Start Date, End Date, Duration, Rotation
- Add Pattern:** Anchor Date: 1/03/2020, Start Date: 1/03/2020, End Date: (empty), Clear button.
- Define Pattern for:** 1 (selected), Week(s), Day(s). There is an 'Override Other Patterns' checkbox.
- Buttons:** Add Shift, Add Pay Code, Shift Template, Pattern Template, Items in rotation (dropdown), Find.
- Table:** A table with columns for days of the week (Sunday to Saturday) and rows for pattern items (No. 1 and 2). Row 1 has shaded cells for Sunday through Thursday. Row 2 has shaded cells for Friday and Saturday.
- Buttons:** Cancel, Apply.

# SCHEDULES — EXERCISE 14

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CONCEPT



# THE END

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Please refer to the Timekeeper Job Aids and the eLearnings for any further questions and don't hesitate to reach out to your local Kronos contact and your supervisors with any questions