



Kronos Scheduler: Request Manager with HyperFinds

Purpose

The Request Manager widget allows managers to review and act on employee requests to self-schedule, swap shifts and take time-off. They can also submit these requests on behalf of the employees. The widget lists requests by type and displays action buttons that enable the manager to:

- View request details and history
- Approve, reject, cancel, or retract requests

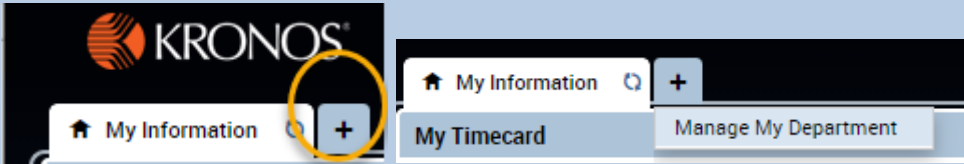
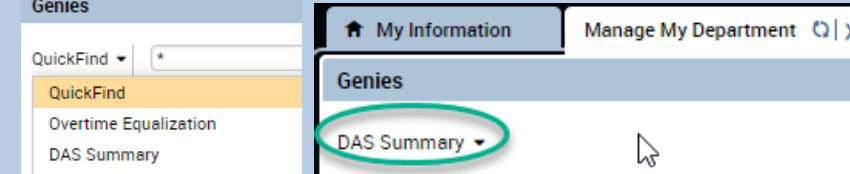
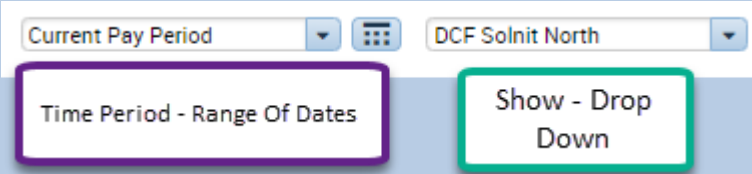
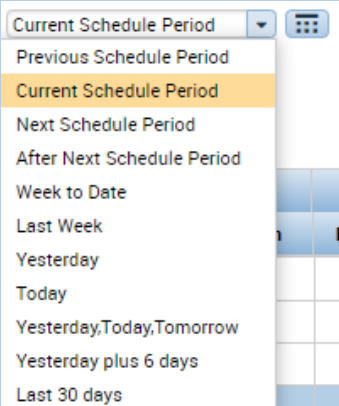
The columns that appear in Request Manager depend on the request type.

This document demonstrates how you can copy/create useful HyperFinds based on Primary Accounts and Locations. Once successfully created these can be leveraged on all Genies, most Widgets and Reports in Kronos.



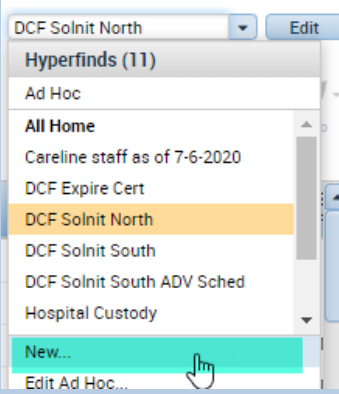
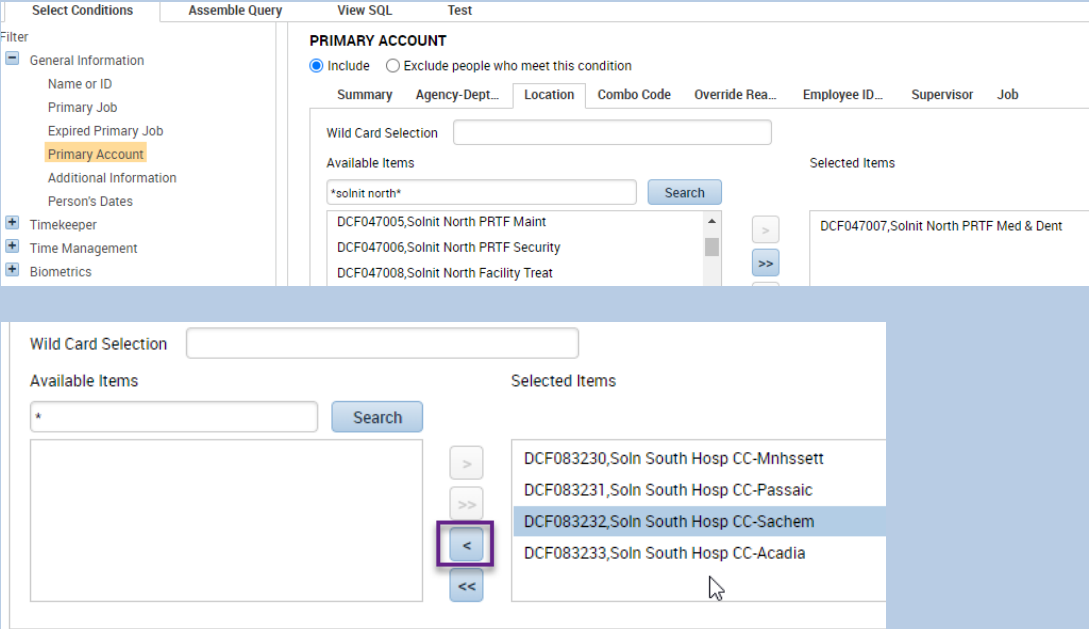
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Using HyperFinds by Primary Account or Location

Steps to using HyperFinds with Request Manager		
1	From the Home Page, click the Plus "+" next to the My Information Tab. Next select <i>Manage My Department</i>	
2	From the Genies, choose DAS Summary	
3	In the Show drop-down list, select a department HyperFind (i.e. DCF Solnit North)	
4	In the Time Period drop down list, select a specific time period or Range of Dates	



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<p>5 IF your current HyperFinds are not sufficient, you can create a new one.</p>	
<p>6 Select the Filter of Primary Account. Any Selected Locations that you do not want can be removed by highlighting the item and clicking the single Arrow point to the left</p> <p>Any Items (Locations) you need to add to the list by typing in part of the name/number in the Available Items and click Search. (used the * on both sides of the name as a wildcard)</p>	 <p>The screenshot shows the Kronos Scheduler interface. On the left, a 'Filter' panel is open with 'Primary Account' selected. The main area shows 'PRIMARY ACCOUNT' settings with 'Include' selected. Below, there are 'Available Items' and 'Selected Items' lists. A search box contains '*solnit north*'. The 'Available Items' list shows several entries, and the 'Selected Items' list shows 'DCF047007,Solnit North PRTF Med & Dent'. A second, zoomed-in screenshot below shows the 'Available Items' search box with a search button and a list of items. The item 'DCF083232,Soln South Hosp CC-Sachem' is highlighted, and a single arrow button pointing left is circled in purple, indicating how to remove an item from the selected list.</p>



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<p>Once you are ready select the items returned and the button that points to the right in order to move it to the Selected item side.</p> <p>In addition, you can select the Job tab in order to filter Labor Jobs</p>	<p>Wild Card Selection <input type="text"/></p> <p>Available Items</p> <p><input type="text" value="*Lak*"/> <input type="button" value="Search"/></p> <ul style="list-style-type: none"> DCF083251,Solnit South PRTF M&D Lakota DCF083255,Soln South PRTF CS-Lakota DCF083259,Soln South PRTF CC-Lakota <p><input type="button" value=">"/> <input type="button" value=">>"/></p> <hr/> <p>PRIMARY ACCOUNT</p> <p><input checked="" type="radio"/> Include <input type="radio"/> Exclude people who meet this condition</p> <p>Summary Agency-Dept... Location Combo Code Override Rea... Employee ID... Supervisor Job</p> <p>Wild Card Selection <input type="text"/></p> <p>Available Items</p> <p><input type="text" value="chil*"/> <input type="button" value="Search"/></p> <ul style="list-style-type: none"> 0377MP,Children&FamiliesAsstSuprtdnt 1920HN,ChildSvcsUnSupv 1920XN,ChildSvcsUnSupv 1921FK,ChildrenServicesSpecialist 1921HN,ChildrenServicesSpecialist <p><input type="button" value=">"/> <input type="button" value=">>"/> <input type="button" value="<"/> <input type="button" value="<<"/></p> <p>Selected Items</p> <p>1920FK,ChildSvcsUnSupv</p>				
<p>7 Once you have all the desired locations in the list, click the Add or Update Button in the Selected Conditions section again.</p> <p>A good practice is Test the HyperFind using the Test Tab near the top of the dialog screen</p>	<p>Selected Conditions <input type="button" value="Add"/> <input type="button" value="Update"/> <input type="button" value="Delete"/></p> <p>Primary labor account matches */DCF047007/*/*/*/*1920FK; 1969HC as of today</p> <hr/> <p>Select Conditions Assemble Query View SQL Test</p> <p>Time Period <input type="text" value="Current Pay Period"/></p> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr> <td>Isaiah</td> </tr> <tr> <td>Rafael</td> </tr> <tr> <td>Adam</td> </tr> </tbody> </table>	Name	Isaiah	Rafael	Adam
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Rafael					
Adam					



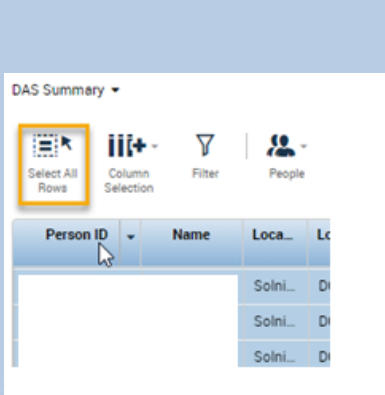
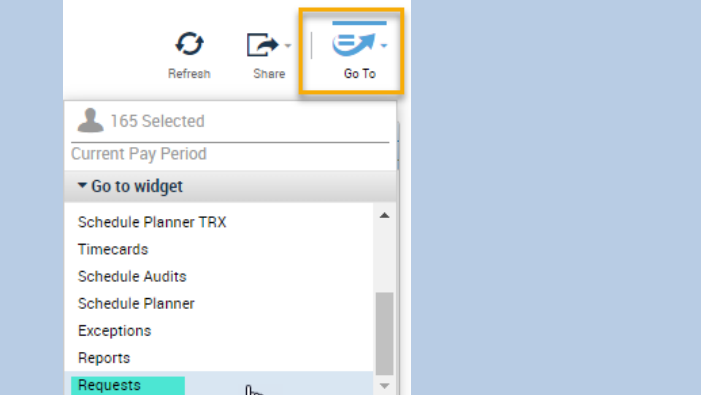
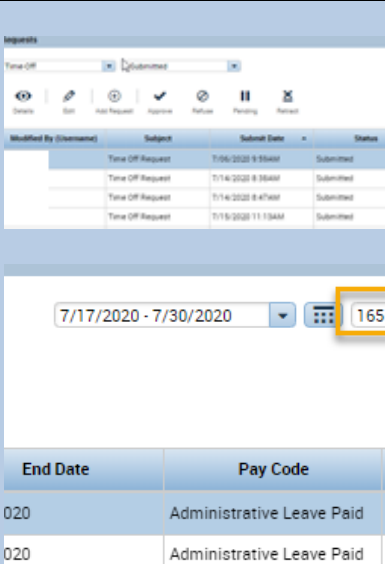
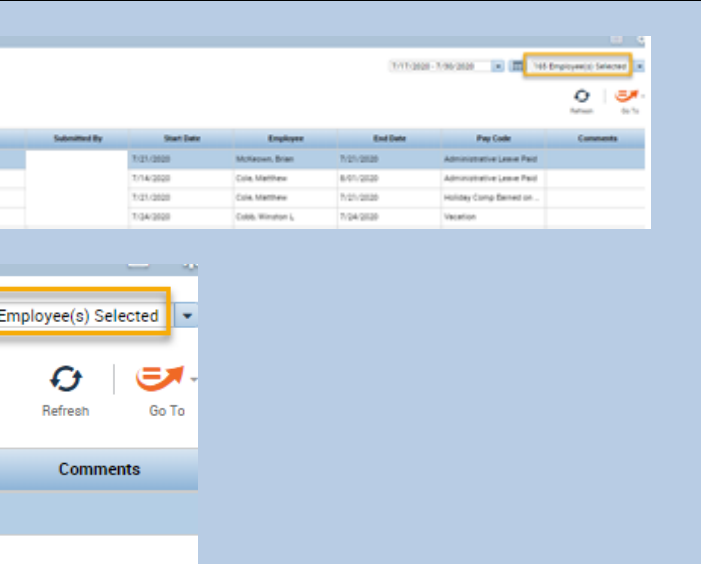
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<p>8</p>	<p>Other Filters of Note</p> <ul style="list-style-type: none">• Primary Job• Name or ID	<p>Filter</p> <ul style="list-style-type: none">General Information<ul style="list-style-type: none">Name or ID<ul style="list-style-type: none">Primary JobExpired Primary JobPrimary AccountAdditional InformationPerson's DatesTimekeeperTime ManagementBiometricsSchedulingWorkforce SchedulerActivityAttendanceAccrualsLeaveUser InformationRole - TimekeeperProcess ManagerTeleTime IP <p>PRIMARY JOB</p> <p><input checked="" type="radio"/> Include <input type="radio"/> Exclude people who meet this condition</p> <p>As Of Date * 7/28/2020 Go To [] Show Clear All</p> <ul style="list-style-type: none">MED&DENTAL 2/01/2020 - Forever<ul style="list-style-type: none">Mansion 6/17/2020 - ForeverOak 6/17/2020 - ForeverMedical 6/17/2020 - Forever<ul style="list-style-type: none">HN 6/17/2020 - ForeverRN 6/17/2020 - ForeverSpruce 6/17/2020 - Forever <p><input type="checkbox"/> Include jobs from all locations below</p> <p>Effective Date As of today</p> <p>Selected Conditions [Add] [Update] [Delete]</p> <p>Primary job matches DCF-DCF91000/Solnit N/MED&DENTAL/Oak/Medical/HN, DCF-DCF91000/Solnit N/MED&DENTAL/Oak/Medical/RN as of today</p>
<p>9</p>	<p>Select the locations on the Org Map of interest.</p> <p>Use the Include Jobs from all locations below checkbox if desired.</p>	<p>PRIMARY JOB</p> <p><input checked="" type="radio"/> Include <input type="radio"/> Exclude people who meet this condition</p> <p>As Of Date * 7/29/2020 Go To []</p> <ul style="list-style-type: none">Spruce 7/16/2020 - Forever<ul style="list-style-type: none"><input checked="" type="checkbox"/> MED&DENTAL 7/16/2020 - Forever<ul style="list-style-type: none">HN 7/16/2020 - ForeverLPN 7/16/2020 - ForeverRN 7/16/2020 - ForeverSUPRN 7/16/2020 - Forever <p><input checked="" type="checkbox"/> Include jobs from all locations below</p> <p>Effective Date As of today</p>




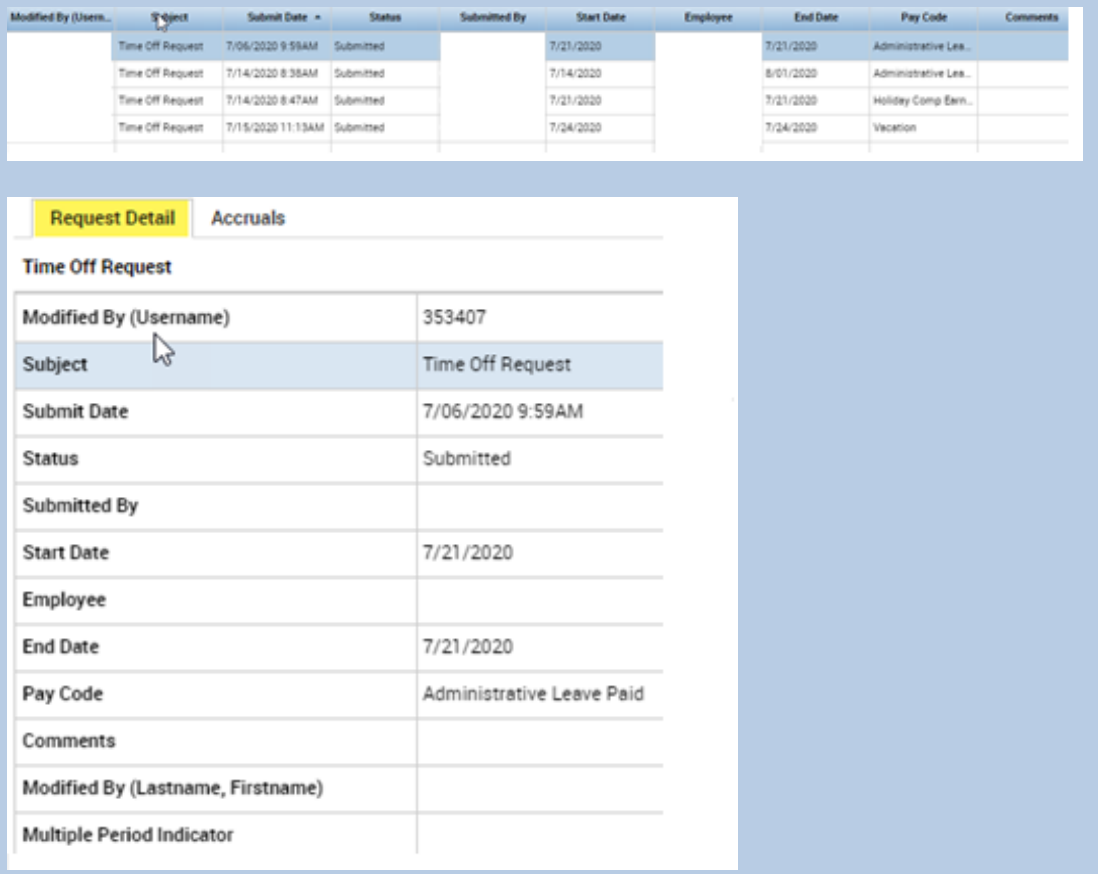
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Request Manager – Navigation

Steps to Review	Time Off Request	Description
<p>1</p> <p>From the Genie results, select the desired employees or click the Select All Rows button</p> <p>Next Click the GoTo Button, then choose Requests widget</p>		
<p>2</p> <p>The Goto feature allows you to inherit the same list of employees from a previous Genie.</p>		
<p>3</p> <p>When the widget opens, know Request/Start Date impacted by the Time Off Request. (Not the Submission Date)</p>	<p>Submission Period — Time period when an employee can submit a schedule request.</p> <p>Request Period — Dates when an employee can request the schedule change (off, etc.).</p> <p>For example: DCF requires employees to request Vacation for the next year in December. Submission Period: 12/1/2020 - 12/31/2020 Request Period: 1/1/2021 - 12/31/2021</p>	



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<p>4</p>	<p>Change the Request Type to Time Off and the Status to Submitted</p>	 <p>In addition, users can select multiple status types, such as Pending and Submitted, the status dropdown then shows the text Multiple (2). (2) - meaning two status types chosen.</p>																																																																										
<p>5</p>	<p>All Time Off Requests currently in “Submitted” status for the Time Period you chose are listed. You can sort on any of the columns presented</p> <p>Towards the bottom left there is a tab called Request Detail that displays information based on the request highlighted</p>	 <table border="1" data-bbox="480 625 1572 779"> <thead> <tr> <th>Modified By (Username)</th> <th>Subject</th> <th>Submit Date</th> <th>Status</th> <th>Submitted By</th> <th>Start Date</th> <th>Employee</th> <th>End Date</th> <th>Pay Code</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td></td> <td>Time Off Request</td> <td>7/06/2020 9:59AM</td> <td>Submitted</td> <td></td> <td>7/21/2020</td> <td></td> <td>7/21/2020</td> <td>Administrative Lea..</td> <td></td> </tr> <tr> <td></td> <td>Time Off Request</td> <td>7/14/2020 8:38AM</td> <td>Submitted</td> <td></td> <td>7/14/2020</td> <td></td> <td>8/01/2020</td> <td>Administrative Lea..</td> <td></td> </tr> <tr> <td></td> <td>Time Off Request</td> <td>7/14/2020 8:47AM</td> <td>Submitted</td> <td></td> <td>7/21/2020</td> <td></td> <td>7/21/2020</td> <td>Holiday Comp Earn..</td> <td></td> </tr> <tr> <td></td> <td>Time Off Request</td> <td>7/15/2020 11:13AM</td> <td>Submitted</td> <td></td> <td>7/24/2020</td> <td></td> <td>7/24/2020</td> <td>Vacation</td> <td></td> </tr> </tbody> </table> <div data-bbox="480 821 1211 1493"> <p>Request Detail Accruals</p> <p>Time Off Request</p> <table border="1"> <tr> <td>Modified By (Username)</td> <td>353407</td> </tr> <tr> <td>Subject</td> <td>Time Off Request</td> </tr> <tr> <td>Submit Date</td> <td>7/06/2020 9:59AM</td> </tr> <tr> <td>Status</td> <td>Submitted</td> </tr> <tr> <td>Submitted By</td> <td></td> </tr> <tr> <td>Start Date</td> <td>7/21/2020</td> </tr> <tr> <td>Employee</td> <td></td> </tr> <tr> <td>End Date</td> <td>7/21/2020</td> </tr> <tr> <td>Pay Code</td> <td>Administrative Leave Paid</td> </tr> <tr> <td>Comments</td> <td></td> </tr> <tr> <td>Modified By (Lastname, Firstname)</td> <td></td> </tr> <tr> <td>Multiple Period Indicator</td> <td></td> </tr> </table> </div>	Modified By (Username)	Subject	Submit Date	Status	Submitted By	Start Date	Employee	End Date	Pay Code	Comments		Time Off Request	7/06/2020 9:59AM	Submitted		7/21/2020		7/21/2020	Administrative Lea..			Time Off Request	7/14/2020 8:38AM	Submitted		7/14/2020		8/01/2020	Administrative Lea..			Time Off Request	7/14/2020 8:47AM	Submitted		7/21/2020		7/21/2020	Holiday Comp Earn..			Time Off Request	7/15/2020 11:13AM	Submitted		7/24/2020		7/24/2020	Vacation		Modified By (Username)	353407	Subject	Time Off Request	Submit Date	7/06/2020 9:59AM	Status	Submitted	Submitted By		Start Date	7/21/2020	Employee		End Date	7/21/2020	Pay Code	Administrative Leave Paid	Comments		Modified By (Lastname, Firstname)		Multiple Period Indicator	
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<p>6 Directly above the results of Request there are action buttons that can be used on any request currently highlighted.</p> <p>The same actions are available when right clicking on a row in the results</p>	
<p>7 The actions (Approve, Refuse, Pending, Retract) will result in a change of status for the request. In addition, can result in an e-mail to the employee and direct manager.</p>	