Getting Started with Workforce Timekeeper – A Guide for Managers

A guide that summarizes the most common manager tasks, which include using Timecards, Applying a Pay Period Approval and Reports.

Kronos Workforce Central Suite
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Using Workforce Timekeeper

Workforce Timekeeper (Kronos) software enables employees to use an industry-standard Web browser, such as Microsoft Internet Explorer or Netscape, to report leave exceptions. The application may be accessed from any computer (PC, Linux or MAC) from both on and off campus. A VPN account is not required in order to access it from off campus.

Instructional Videos are available at the following URL:
http://www.imss.caltech.edu/cms.php?op=wiki&wiki_op=view&id=346

Using a Browser

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

**URL Address Combo box** displays only the URL of the logon page and the URL of the Workforce Timekeeper main page.

**Favorites (Bookmarks)** allow you to add the Workforce Timekeeper URL to your browser’s Favorites list or bookmarks. You can then click on the bookmarked entry to launch the Workforce Timekeeper Log On display.

**Back and Forward buttons** allow you to return to pages that you previously accessed during the current session. If you do not save your changes before clicking the Back button, the following occurs:
- If you use Internet Explorer, a message warns you that you have unsaved data and you can choose to continue the move and lose your changes, or cancel the move and save your changes.
- If you use Netscape or a Macintosh system, unsaved data is lost.

**Refresh (Reload)** reloads Workforce Timekeeper in its default state. It does not refresh the Workforce Timekeeper information.

**Stop** does not interrupt loading Workforce Timekeeper pages.

**Print** enables you to print reports from My Reports. In other Workforce Timekeeper components, however, clicking the browser Print button only prints the navigation bar; you must use the print controls within workforce Timekeeper.
**Viewing Customized Displays**

The Workforce Timekeeper display is customized according to Caltech’s time and attendance policies and access profiles.

**Logging on**

You may access Kronos via the IMSS Home page located at the following URL: [http://www.imss.caltech.edu](http://www.imss.caltech.edu).

1. Navigate to the **IMSS Home** page located at [http://www.imss.caltech.edu](http://www.imss.caltech.edu).

2. Click on the **Kronos Timekeeping** link.

   The **Kronos Logon** window will open.
3. Enter your User Name and Password information and click on the Log On button.

**NOTE:** Your Kronos username and password is the same one you use for your access.caltech account.

**Logging Off**

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

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

If you use Netscape or a Macintosh system, data is lost without a warning message unless you save your changes before logging out.

**Note:** Using the x in the upper right-hand corner of your browser with close the Application but all unsaved data will be lost.

**Logon Time Limit**

If you are logged on for a 30 minutes or more the Workforce Timekeeper system detects no activity, a message appears, informing you that your session is about to time out. You must enter your password and click Log On to continue your session where you left off. After you enter your password, another message appears, “Your Logon was successful.”
Changing Your Password Option

If at any time you need to change your password to Kronos you must do so in the access.caltech application.

1. Log into access.caltech and select the **Manage My Password** tab.

2. Enter your **Current Password**.

3. Enter your new password in the **Type your new password** and **Type your new Password** again fields.

4. Select the **Reset Password** button.
Understanding the Display

Each Workforce Timekeeper component contains three display elements:

- **Browser toolbar and Menu**
- **Workspace**
- **Navigation Bar**

**Browser toolbar and Menu**

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

**Workspace**

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

The selections on the navigation bar vary, depending on Caltech’s policies and your access profiles. All users have access to the following options:

Log off link

A Hide and Show arrow in the upper-right corner, which allows you to reduce the size of the navigation bar and restore its default size with one click.

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

- **My Genies** are configurable tools for automating manager tasks by displaying a summary of selected employee information.

- **Group Edit Results** allows you to make changes to multiple employees at the same time.

- **Reports** are used to generate standard or custom reports.

- **My Information** is used to manage your own time:
  - My timecard
  - My Reports

- **My Links** is used to access HR related documentation:
  - CIT Policies
  - Kronos Training Materials

- **Help** invokes the online help.
Accessing Key Components and Launch Links

The components that are typically accessed include:

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

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

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

**Reports** – Run reports that summarize employee, people, or user data in a variety of ways. Standard reports and custom reports are available.

**People** – The People Editor displays a summary of the relevant information contained in the Person Workspaces such as employee status hire date and email address. It also displays summary information contained in the Job Assignment workspace, such as the employee primary job and labor account.
Navigating Workforce Timekeeper

In addition to the standard browser controls, you can select various Workforce Timekeeper components using the navigational buttons, dialog boxes, and drop-down lists that are located within the workspace of each component.

Using Online Help

All components within Workforce Timekeeper include access to online Help:

- Click the Help link located in the upper right hand corner of the window.

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

After the online Help opens, you can navigate 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
Workforce Genies

The Workforce Timekeeper Genies summary displays allow you to:

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

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

Using Workforce Genies

Four types of Workforce Genies are available:

**QuickFind**

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

**Pay Period Close**

*Pay Period Close Genie* is the last step in the Timecard approval process. This Genie is used for Approval and Signoff. The approval lets the Payroll department know that the timecard is finished. The signoff is performed in order to prevent further edits to the timecard.

**Pay Code Totals**

*Pay Code Totals Genie* is a summary of the most common used earning elements such as; Regular Hours, Vacation, and Overtime.

**Reconcile Timecard**

*Reconcile Timecard* is a summarized display of an employee’s attendance record such as; Overtime, Unexcused Absence, and Late In.
Managing Timecards

Chapter 2
Instructions for Reporting Leave Exceptions

**Exempt Employees** – Caltech pays on a salaried basis, (i.e., the Institute establishes a fixed salary) for performance of the position’s duties and responsibilities regardless of how many hours are worked and pays that salary in bi-weekly increments. Exempt employees are not required to track or report hours required to perform assigned duties; they are required only to report full day absences. Exempt employees are not eligible for overtime compensation and are not required to report meal breaks.

**Exempt Employees’ Procedures for Reporting Leave**

REMINDER: Kronos is for exception reporting only.

**Bi-Weekly Exempt Electronic Timecard**

All absences must be submitted in full-day increments according to your schedule. Partial days of absence are not entered on this timecard.

Select the appropriate code representing the reason for absence in “Pay Code” column. Refer to the drop down menu beside the “Pay Code” to view the list of leave exception codes.
Timecard Edits to Your Own Timecard

Entering Leave Exceptions

The following is an example of entering Sick Time.

1. Click on My Information.

2. Select My Timecard from My Information.

3. Select Sick Emp (Sick Employee) from the Pay Code drop down menu.
4. Enter the **hours** in the Column for the day that the sick time was taken.

5. Select **Save** from the menu bar to save your changes.

   **Follow the steps above to enter a leave exception for another Pay Code** (i.e. Vacation, Jury duty, etc.)
Entering Time for an Additional Pay Code

1. Click on the Insert Row icon. This will add an additional row to your timecard.

2. Follow the steps in “Entering Leave Exceptions” to enter leave against another (i.e. Vacation Pay) Pay Code.
Deleting Leave Exceptions

There are two methods of deleting information within a timecard; deleting the entire row or deleting information within a single field.

Deleting an Entire Row

1. Click on the delete row icon to the left of the line you would like to delete.

   A Workforce Central message box will open

2. Select the Yes button.

Notice that the line is still visible on the timecard and the font color of My Timecard changed to orange to alert you that you have unsaved data. Once you save, the line you were attempting to delete will be removed from the timecard.

3. Select Save.
Deleting Information within a Single Field

1. Place your cursor in the field with the information you would like to delete and select the **Delete key** on your keyboard.

2. Select **Save**.
Employee Approval – Own Timecard

The employee must approve the electronic timecard if exceptions have been entered. By approving the electronic timecard, you attest to the best of your knowledge that your information submitted is complete and accurate. You are responsible for any inaccuracy or omission of which you are aware at the time the electronic timecard was approved and submitted. You may be subject to disciplinary action up to and including termination for submitting any inaccurate information on your report.

NOTE: Timecards for pay periods that do not have any exception reporting do not need to be approved by employee or manager.

Timecard Reviewal Process

Your timecard will be reviewed by the person to whom you report, at the completion of the current pay period. Once you have approved your electronic timecard in Kronos, it will be reviewed by your department’s Payroll Activity Monitor for any inaccuracies or omissions.

Resources for Making Corrections

To get more detailed information on how to make corrections to your timecard please use any of the following resources:

- Your Payroll Activity Monitor
- Your Supervisor
- Payroll Hotline x8668
- “My Links” on the Kronos Toolbar
- CIT Policies
- CIT Training Materials (videos and handbooks)
Once a timecard has been approved, it may no longer be edited. Any additional changes must be entered by the Payroll Activity Monitor (PAM).

Since changes cannot be made to your timecard once it has been approved, please perform your approval on your last workday of the pay period.

1. Select Approve from the Approvals menu.
Running and Printing a Report

All Kronos users will have access to the Accrual Balances and Projections and the Schedule reports.

**Running a Report**

1. Click on **My Reports** from the My Information menu.

2. Click the **View Report** button.

3. Select **Print** from the File menu of the browser to print the report.
Applying a Pay Period Approval - Managers

Before the Payroll Department can process payroll, you will need to apply your approval to all employees’ timecards.

A pay period approval lets the payroll department know that a timecard is finished being edited and is ready for payroll processing.

Note: Approvals for your departments are to be completed by the last Friday of the current pay period unless otherwise notified by Payroll.

1. Leaving the asterisk in the Name or ID field, select Previous Pay Period from the Time Period drop-down menu.

2. Choose Select All from the Actions menu.

3. Select the Timecard link.

The employee’s timecard will open.
4. Select the **Approve** from the **Approvals** menu.

![Approval Statement]

I have reviewed these time entries, and they are accurate to the best of my knowledge.

5. Select **Approve**.

6. Use the **arrows** to toggle to each of your employees records and perform the approval.
Generating Reports

Chapter 3
Printing Reports

Identifying Standard Reports Categories

**All** – The All category includes an alphabetical listing of each standard report and any custom reports to which you have access.

**Accruals** – The Accruals category contains reports that include accruals information, such as balances and projections and details about accrual activity.

**Detail Genie** – The Detail Genie category contains reports that include employee specific information such as absent employees and hours by job.

**Roll-up Genie** – The Roll-up Genie category contains reports for viewing hours signed-off information.

**Scheduler** – The Scheduler category contains reports that detail schedule and accruals information.

**Timecard** – The Timecard category contains reports that display accrual information, time and attendance information and schedules.
Accessing Reports

There are two ways to access the reports window. You can access reports from the Kronos navigation bar or you can access reports by selecting the Reports launch button from within a Workforce Genie.

Running a Standard Report

Using the Kronos Navigation Bar to Run a Report

1. Select Reports from the Kronos navigation bar.

2. Select a report from the Categories list.
3. Select **Range of Dates** from the **Time Period** drop-down menu.

   **Note:** You must always select **Range of Dates** as the time period in order to view the date parameters of the report.

   The **Select Range of Dates** window will open.

4. Use the **Start Date** and **End Date** drop-down menus to enter the applicable date range.

5. Select the **OK** button.

6. Select the **Run Report** tab.
7. In order to monitor the status of the report, select the **Check Run Status** tab.
   To view the updated status, select **Refresh Status** within the **Check Run Status Tab**.

8. To view the report, select **View Report** from the **Check Run Status** tab.

9. To delete a report, highlight the report you want to delete and select **Delete** from the **Check Run Status** tab.
Running a Customized Report

Customized report options allow you to see only the data that you want in a report. These options differ for each report.

Use the following steps to select different options for customization:

1. Follow steps 1-5 from the Running a Standard Report section on page 28.

6. Select the Set Options tab and if the report is customizable a set of options will appear.

7. Select the option you would like to use.

8. Select Run Report from the Set Options tab.
Printing a Report

Once a report has been generated, you may print it from within the Check Run Status tab.

1. Place your cursor on the line of the applicable report and select View Report. An adobe acrobat window will launch.

2. Select the Print icon.

A Print window will open.
3. Select the **OK** button.
Additional Employee Information

Chapter 4
Additional Employee Information

Consequences for Mischarging Time

Consequences

- Errors in reporting hours worked, even those occurring inadvertently; can result in serious consequences to Caltech and the individuals involved.

- Penalties to the Institute may include civil liability, temporary or permanent loss of funding and in extreme cases criminal fines.

- Penalties to employees may include disciplinary action up to and including termination (Personnel Memorandum 14 – Terminations).

Reporting Suspected Timecard Abuses

When to Report Abuse

- Employees should immediately report any suspected timecard improprieties to their supervisor or PAM.

- Suspected improprieties include, but are not limited to:
  - falsifying timecard records
  - inaccurate time reporting
  - unreported leaves of absence
  - swiping in at the start of a shift and then not reporting to work
  - allowing someone other than the designated employee, supervisor or PAM to access a timecard.
Additional Employee Information

How to Report Abuse

You can contact the following offices to report suspected improprieties:

- Audit Services and Institute Compliance
  - ASIC has a hotline where you can make anonymous reports by calling x 8787 or 1-888-395-8787
  - or you can visit the web and file an anonymous form at http://asic.caltech.edu/compliance/hotline

- Employee & Organizational Development (EOD)
  - You can contact EOD also known as Employee Relations at x6382
  - or send email to eod@caltech.edu.

- Payroll Hotline x8668