KRONOS® User Guide

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McGill

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Introduction

This document will be used to train all supervisors. General Kronos guidelines have been identified as well as a step-by-step process on how to manage your employees' time using the newly implemented Kronos system V8.

This User Guide provides detailed descriptions and guidance on how to use the **Kronos Time Managing, Scheduler** system and **McGill Interfaces** that has been configured for McGill.

Typographical convention

The following table describes the icons used in this manual. Icons identify the policies and practices of McGill, tips, awareness, scenarios/examples and notices.

Icons	Description
	More information, comment, note.
	Alert recommending awareness when doing the task.
	Sample task scenario/example
	Supervisor
	Supervisor – Super User
	Payroll
Bold	Field names, tabs, views, button menus, scroll menus.

Training Delivery Strategy

- ☑ Training on Time Management including demonstrations

Training Material Walkthrough

- ☑ Kronos for Supervisor User Guide
- ☑ Exercises based on test scripts

Topic 1 – Kronos Overview and Basics Concepts

1.1 Kronos Access & Workspace Overview

Access to Kronos

From the Web Browser, enter the following Kronos hyperlink: http://qkronos.campus.mcgill.ca/wfc/logon

a) The Kronos logon page will appear.
b) Enter your **DNet User Name** in the User Name field.
c) Enter your **DNet Password** in the Password field.
d) Click on the arrow beside the password field.

The Supervisor Workspace will appear.

Log off from Kronos

a) Click **Sign Out** to log out located on top left corner of the supervisor.

Tip

We recommend that you always end your work session by clicking the **Sign Out link,** located in the top left corner. Do not click **Close (X**) without first logging off because it might leave your connection to the application open, allowing unauthorized people to view and edit information.

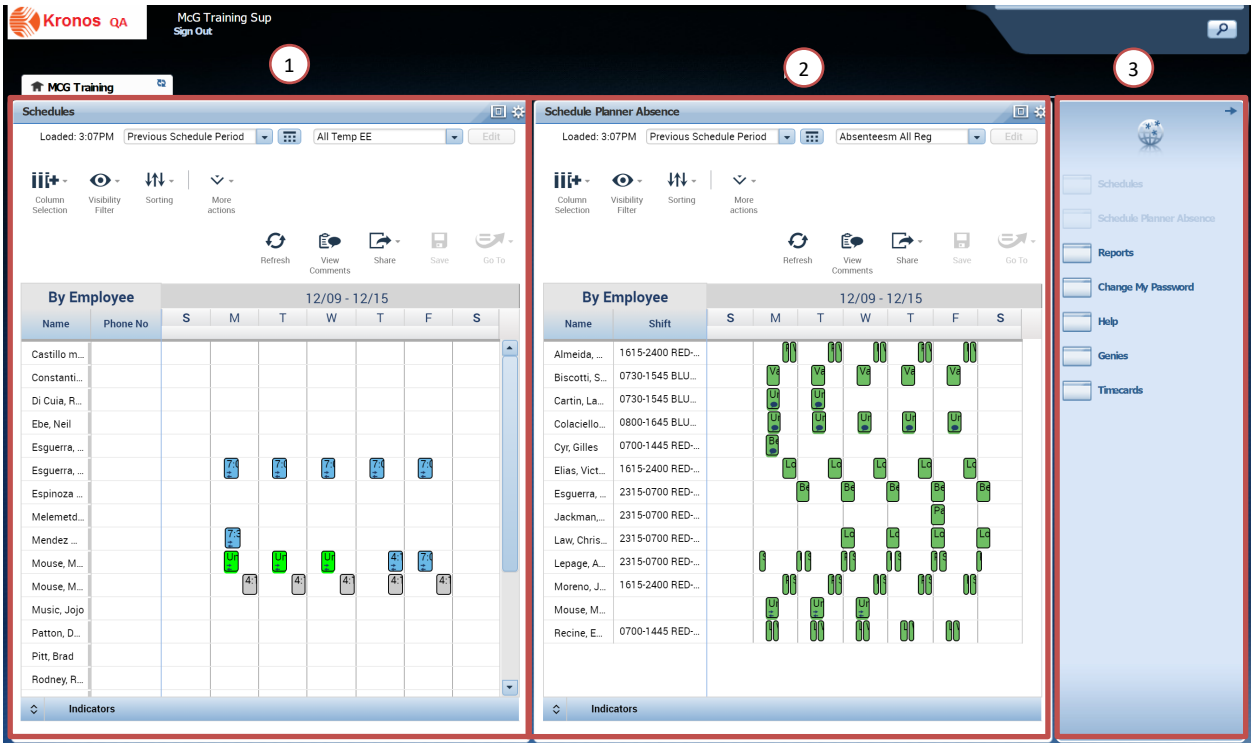
Web browser navigation tools

Tip

We recommend to never use your Web browser navigation tool as per they are not supported by your Kronos system. Using these tools can corrupt your session and you may lose all your unsaved changes.

Supervisor Workspace Overview

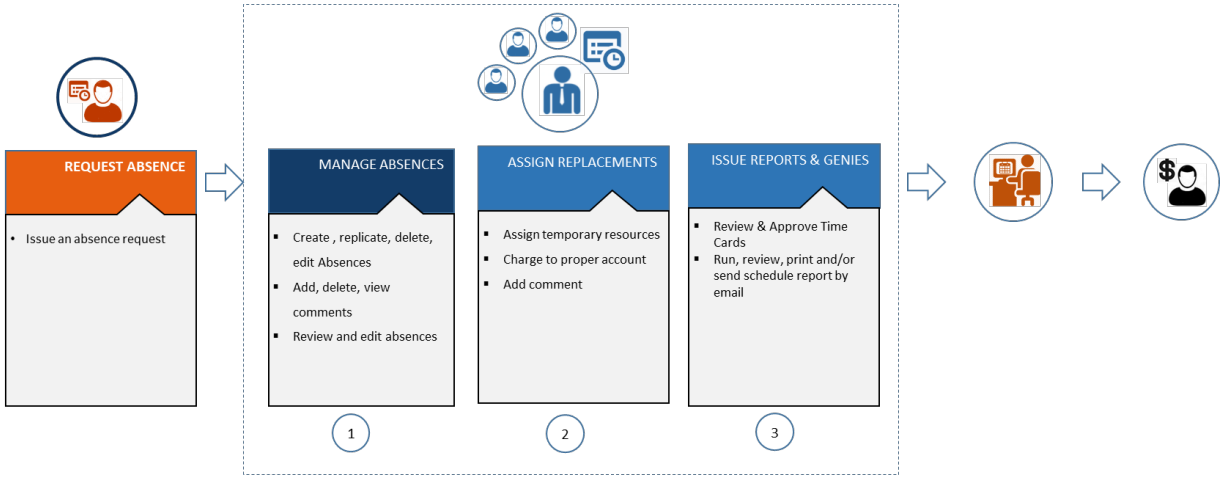
The Supervisor Workspace shows 3 main areas: Schedules, Schedule Planner Absence, Widgets.



OBJECT	DEFINITION/FUNCTION
1. SCHEDULES	Allows to add absence and to add shift to temporary employees.
2. SCHEDULE PLANNER	Shows the schedules per employee.
3. WIDGETS	Widgets are the task engines in a navigator workspace and enable users to perform job-related tasks.

1.2 Time Management Process Overview

The following shows the Time Management Process at McGill within Kronos.



OBJECT	MAIN TASKS PER ROLE
EMPLOYEE	Issue an absence request
1. SUPERVISOR - MANAGE ABSENCES	Create, replicate, delete, edit Absences Add, delete, view comments Review and edit absences
2. SUPERVISOR - ASSIGN REPLACEMENTS	Assign Temporary resources Charge to proper account
3. SUPERVISOR – ISSUE REPORTS AND GENIES	Review and Print the schedule Review Time Cards Run, review, print and/or send schedule report by email
SUPERVISOR	Refer to Mcgill Processes
PAYROLL	Refer to Mcgill Processes

1.3 Widgets Overview

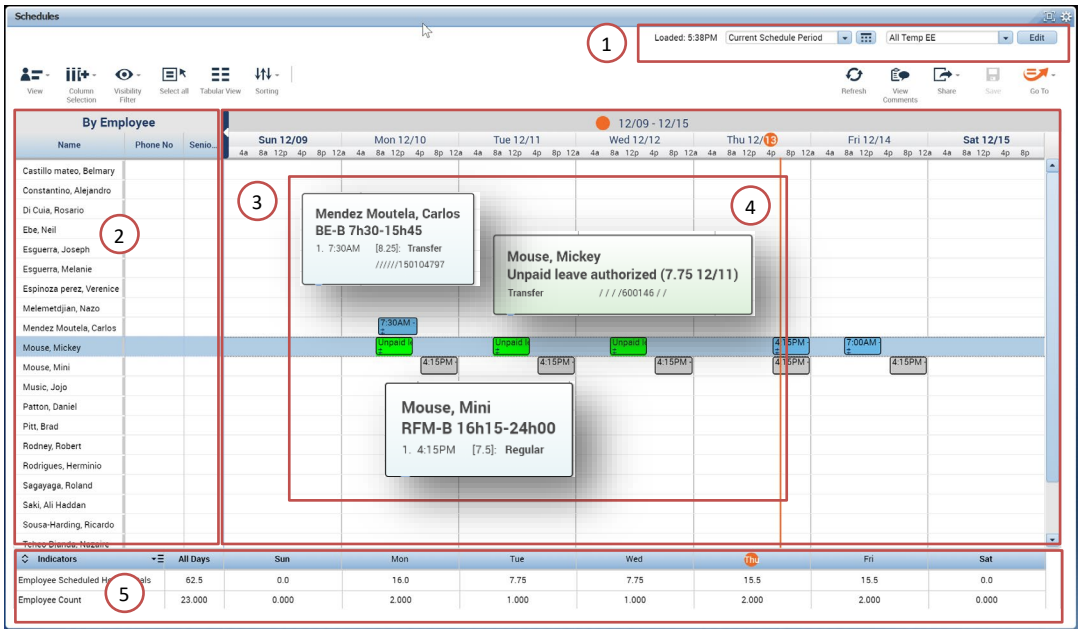
1.3.1. Action Icons

The following icons allow to personalize the information and belongs to almost every widget.

OBJECT	DEFINITION/FUNCTION
COLUMN SELECTION	Allows to check and choose the columns to view on the screen such as (Phone No, Scheduled Hours, Shift, Seniority).
VISIBILITY FILTER	Allows to pick and choose the type of intervals to view on the screen such as Daily, Shift Time, Pay code name, Assigned Shifts, Pay Codes, Scheduled Accrual Amounts, Holiday)
SORTING	Allows to create basic sorting by Name, Scheduled, Hours, Shift, Seniority, Phone No
MORE ACTIONS	Allows to View (By Employee, By Schedule Group). Select All the employees. Change from Tabular View to Gantt View. Load Group from a list.
REFRESH	Retrieves information from the database, hence cancelling any unsaved changes. Can be useful when a change has been applied and you want to see it in already opened window (example: Timecard is already opened, but Schedule information has just changed and you want the Timecard to reflect those changes).
VIEW COMMENTS	Allows to view all the comments.
SHARE	Allows you to print the screen and export to an Excel or .csv file.
SAVE	Allows you to record any changes.
GO TO	Allows to go to another widget.

1.3.2. Schedules

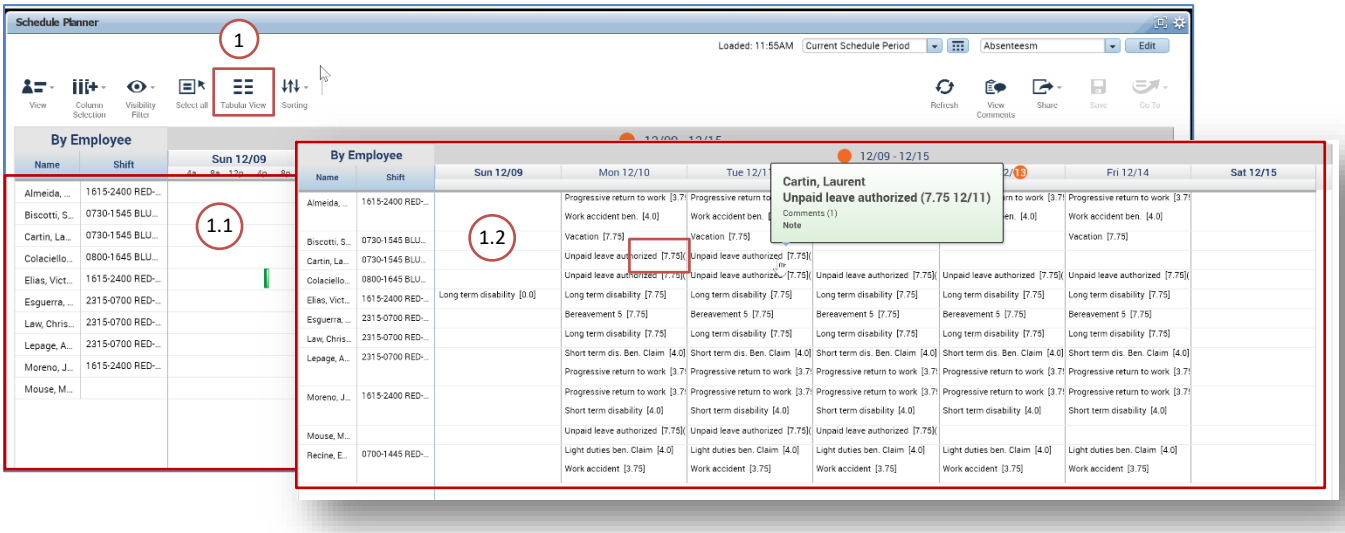
Allows to view schedules for a selected group of employees. This screen allows to execute most of the supervisor's tasks such as enter an absence and assign the shift to a temporary employee.



OBJECT	DEFINITION/FUNCTION
1. EMPLOYEES & TIME PERIOD	Specifies which employee's Schedule and time period you are displaying.
2. GRID	Displays the selected list of employees with their attendance information.
3. EMPLOYEE SCHEDULE	Provides a Gantt type view of the employee's schedule. The schedule contains regular shifts, pay codes (absences) and transfers shift cells.
4. SHIFT	Represents the different shifts cells detail in pop-up screens. The shift cell's colors represent: 7:30AM - Shift containing a Transfer (ex: to ans Event or to Temporary Employee Unpaid li Schedule Absence Pay Code 4:15PM - Regular shift.
5. INDICATORS	Presents Employee Scheduled Hours Totals and the Employee Count per days & All Days.

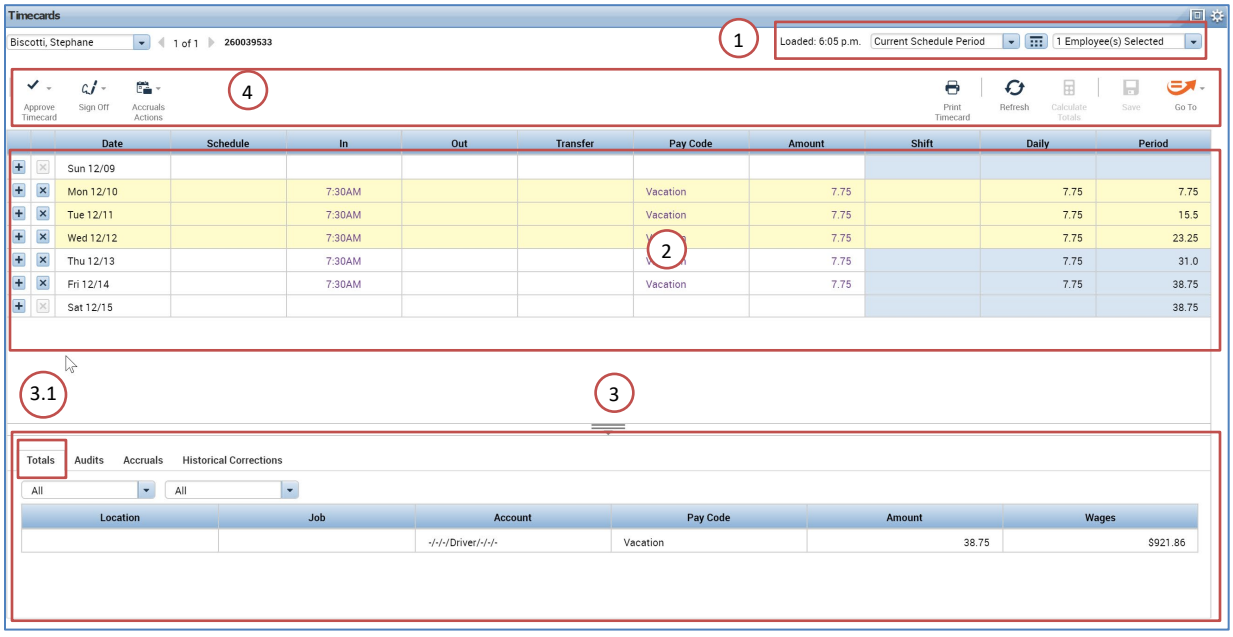
1.3.3. Schedule Planner

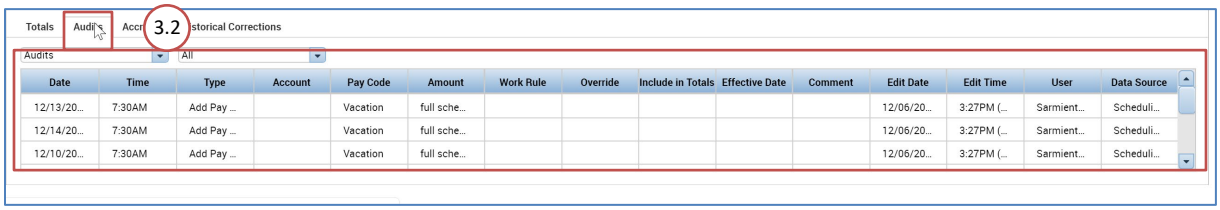
Allows to view schedules absences and transfers for a selected group of employees.

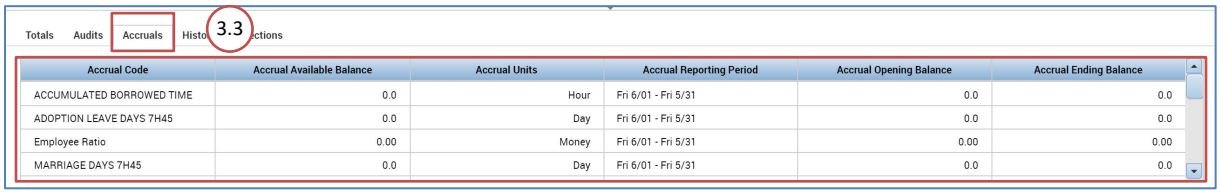


OBJECT	DEFINITION/FUNCTION
1. TABULAR VIEW ICON	Allows to switch from the Tabular view to the Gantt View
1.1 GANTT VIEW	Displays the shifts in color.
1.2 TABULAR VIEW	Displays the detailed shifts

1.3.4. Timecard Details



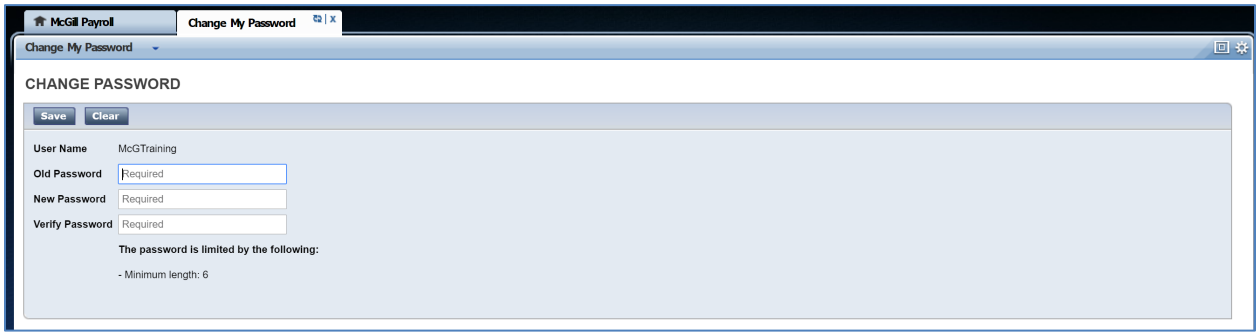




OBJECT	DEFINITION/FUNCTION
1. NAME ID & TIME PERIOD	Specifies which employee's timecard and time period you are displaying. Make sure you are selecting the correct Time Period.
2. TIMECARD GRID	Provides date rows and columns to record IN/OUT time punches, pay code duration, transfers, and comments.
3. SUPPORTING TABS:	Displays information related to specific actions applied to the timecard. Following are the available tabs:
3.1 TOTALS	Displays total hours recorded for each earnings code on the timecard for the selected range of dates. By default, all the options will be selected. Use the Drop-down Menu to display by shifts, by day or for the pay period.
3.2 ACCRUALS	Displays leave balances for the employee such as vacation.
3.3 AUDITS	List including the timestamp and resources of all actions applied to a timecard. By default, the option All will be selected. Use the Drop-down Menu to display by Pay code, Hours worked, Duration, Approvals/Sign-offs, justifications.
3.4 HISTORICAL CORRECTIONS	Displays the corrections by Detail and Summary view.
SIGN OFF	This tab only appears when a Timecard has been signed off. Related information such as the status and the effective date and user of the Sign-offs is displays.
PRINT TIMECARD	

1.3.5. Change My Password

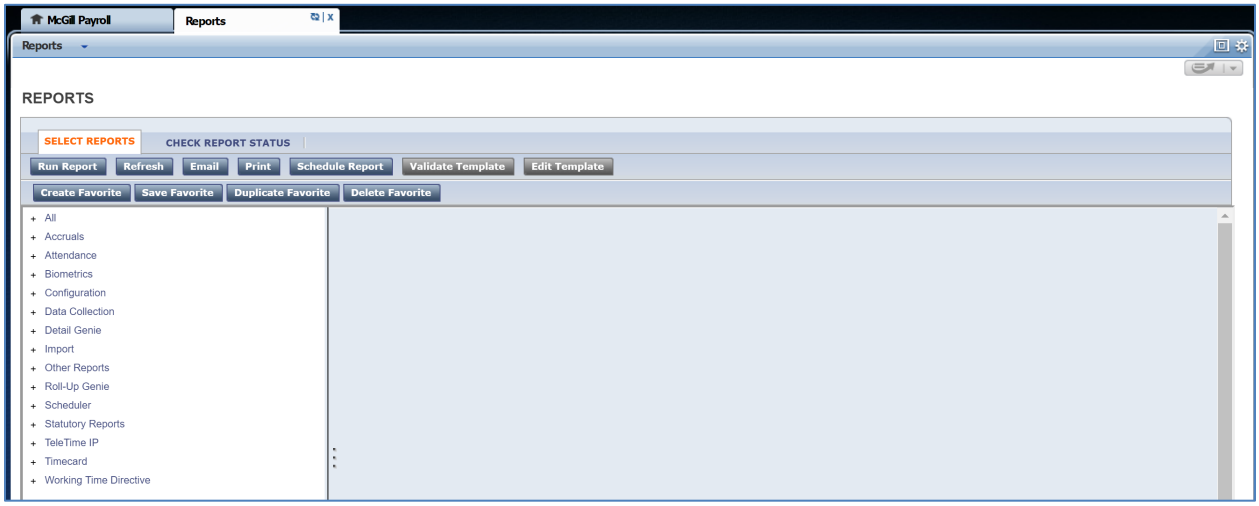
Allows the user to change password.



OBJECT	DEFINITION/FUNCTION
SAVE	Allows to save the password.
CLEAR	Allows to erase all entered characters in the screen in one click.

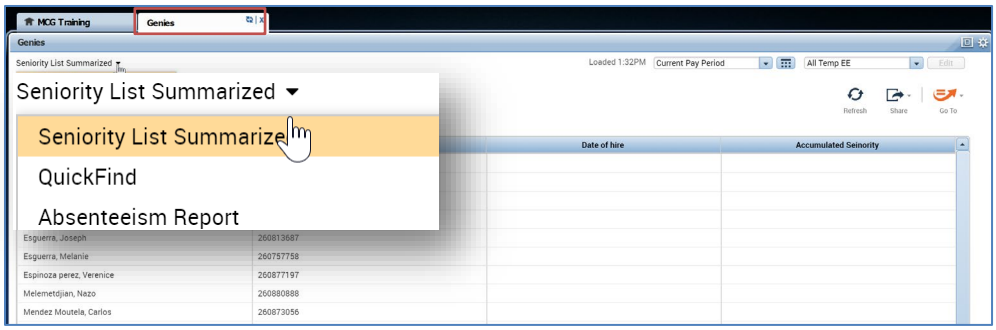
1.3.6. Reports

This widget allows to issue Kronos generic reports. (Refer to the Issue Report section).



1.4. Genies

Genies allow to generate McGill custom reports to review employee information such as their seniority. For example, Seniority List Summarized, Quick Find, Absenteeism Report.



1.4.1. Quick Find

The Quick Find allows you to search for a specific person or a set of employees and then go to their timecard, employee profile, schedule or reports in a quick matter.

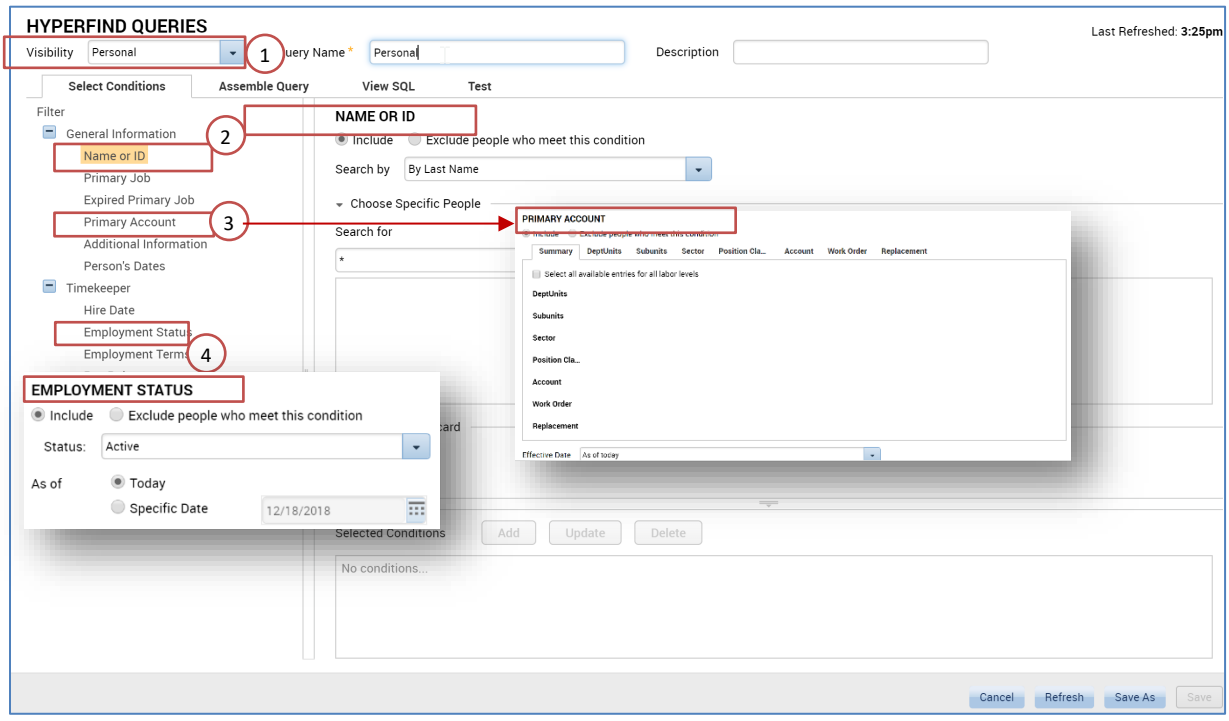
Wild card characters

Use the following wild card as a substitute for one or more characters:

- ☑ Asterisk (*) by itself to indicate all entries.
  For example: *00 selects any number that ends in 00 such as 100, 200 or 1500.
- ☑ Question mark (?) to substitute more than one character.
  For example: ?00 selects any 3-digit number that ends with 00 such as 100, 200 or 500.

1.5 Hyperfind Overview

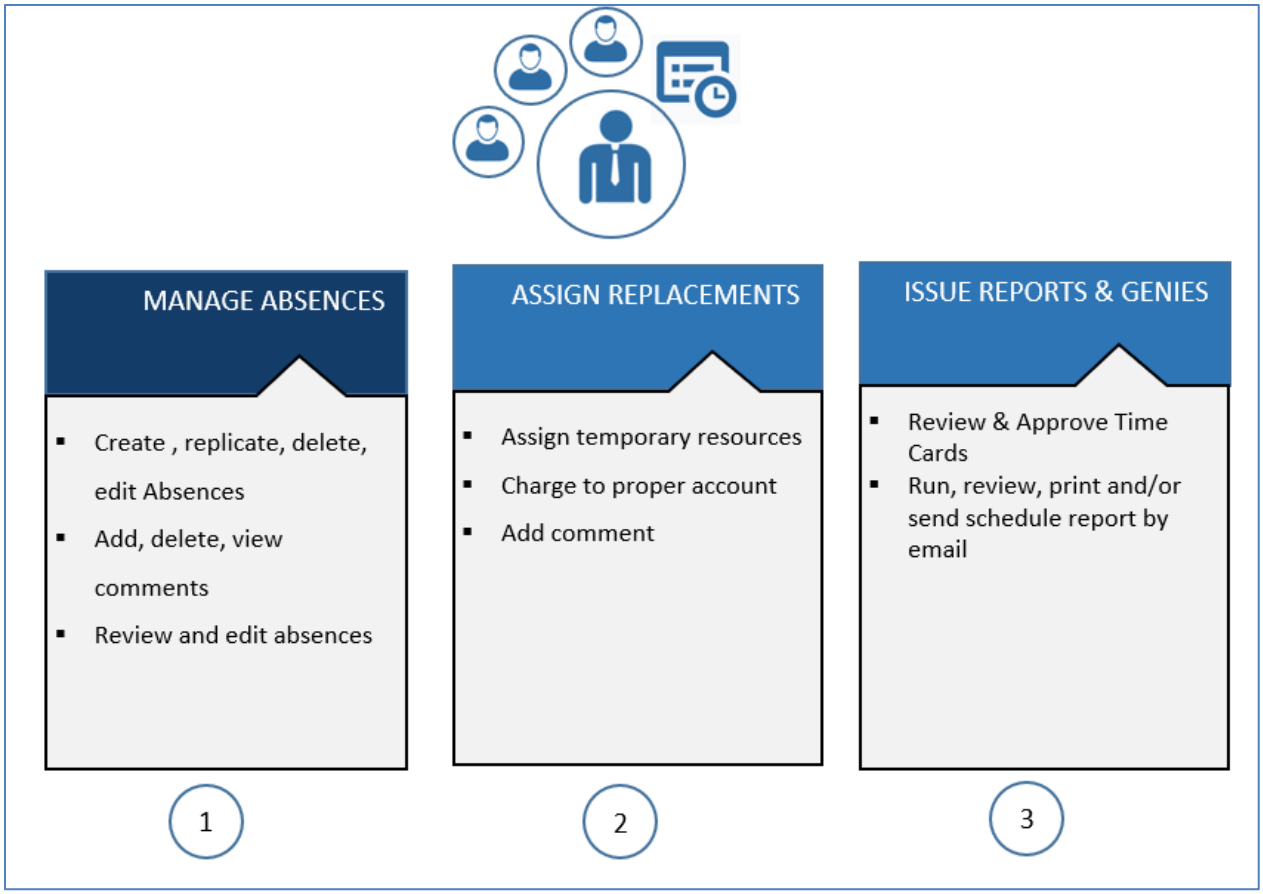
Hyperfind queries are quick links to reach different criteria.



Topic 2 – Manage Schedule

2.0 Supervisor Tasks

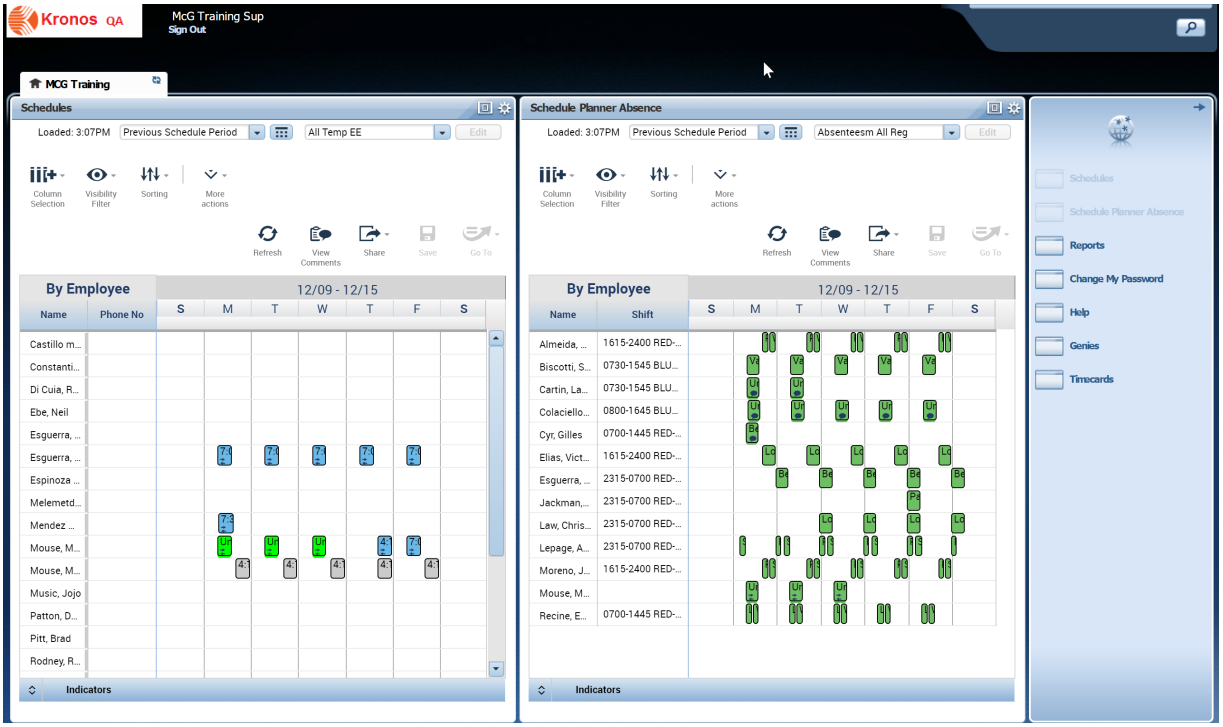
As a Supervisor your role will be to:



Access Schedule

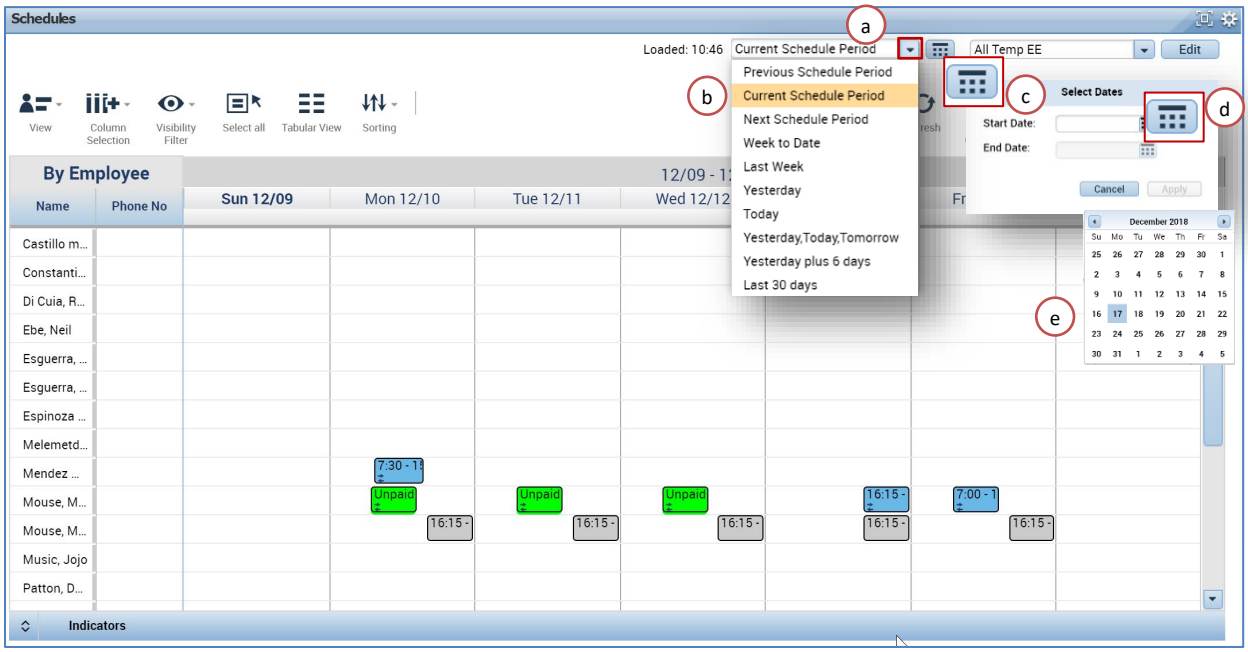
To manage absences, the supervisor needs to access to the proper schedules and pay code period.

By default, the supervisor workspace overview displays show most useful widgets screens to manage the schedules: Schedule Planner and the Schedules.



Specify Pay Period

The following steps are common to the Schedules, Schedule Planner and the Timcards widgets.



a. Click on the **Pay Period** drop-down arrow.
b. Select **Current Schedule Period**.
c. Or -

   From the **Calendar** icon, enter the **Start Date** and **End Date.**
d. Or -

   Click on the **Start Date Calendar** icon and select the date.
e. Click on the **End Date Calendar** icon and select the date.

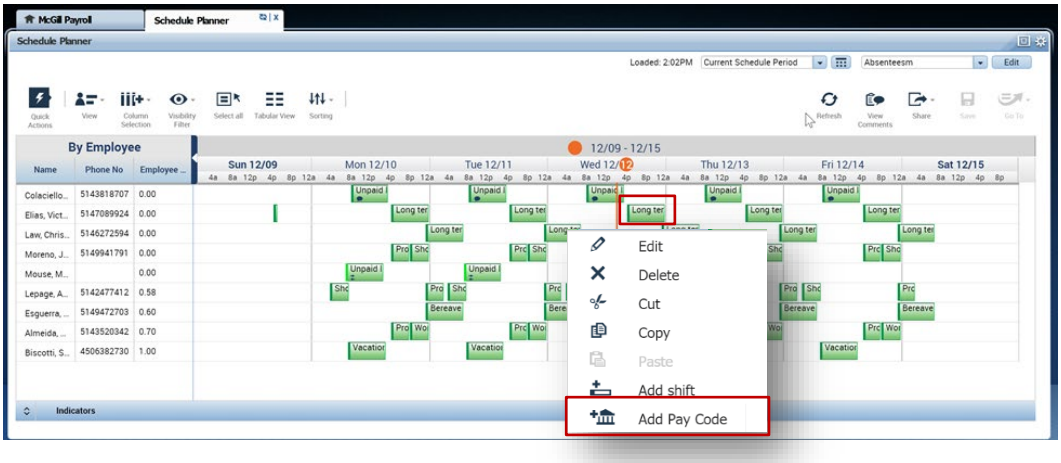
- Select hyperfind (group) (Regular per sector, Temporary per sector, Absenteeism per sector)

2.1 Manage Absence

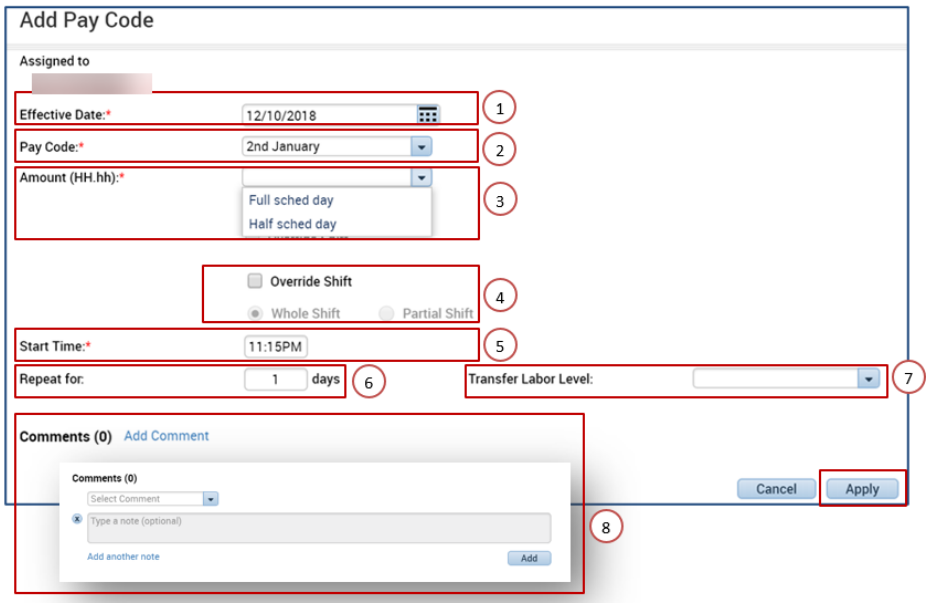
The following section explains how to add unplanned absences for days or hours and attached a detail comment from the Schedule Planner Widget.

2.1.1. Create, enter, remove, Absence (Pay code/Category)

a) Right-Click on a Shift cell and select Add Pay Code.



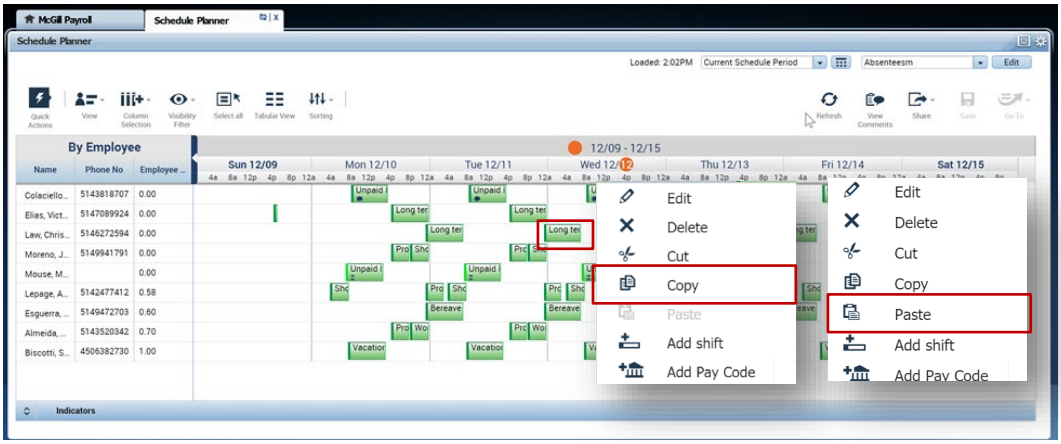
b) Enter the corresponding information (refer to list below) then click on the **Apply** button.



OBJECT	DEFINITION/FUNCTION
1. EFFECTIVE DATE	Enter or select the abscence starting date by clicking on the calendar.
2. PAY CODE	Select a Pay Code from the drop-down list.
3. AMOUNT (HH, hh) FULL SCHEDULE DAY HALF SCHED DAY	Select Full Schedule Day if the absence cover a full day. Select Hall Schedule Day if the absence cover half of a day.
4. OVERRIDE SHIFT	Check the Whole or Partial Shift corresponding to the regular shift replacement.
5. START TIME	This radio button shows up only for if Override Shift – Partial Shift is checked.
6. REPEAT FOR	Insert the number of days that this shift must be applied.
7. TRANSFER LABOR LEVEL	If required, select the corresponding Supervisor Transfer Labor Level if this temporary employee shift belongs to another supervisor group.
8. COMMENTS	Refer to comment section.

Replicate an Absence

a) Right-Click on a Shift cell then select **Copy**.
b) Right-Click on a destination Shift cell then select **Paste**.



Edit an Absence

Right-Click on a Shift cell then select **Edit**.

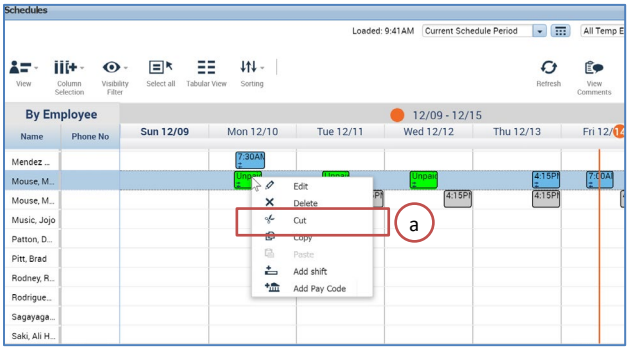
Delete an Absence

Right-Click on a Shift cell then select **Delete**.

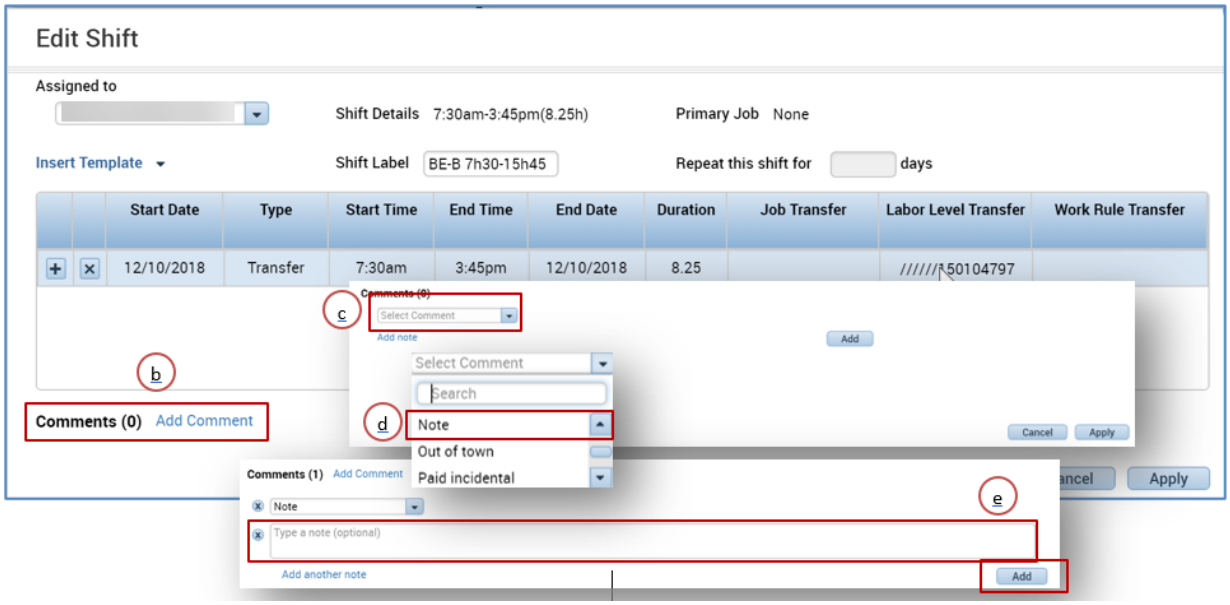
Add a comment

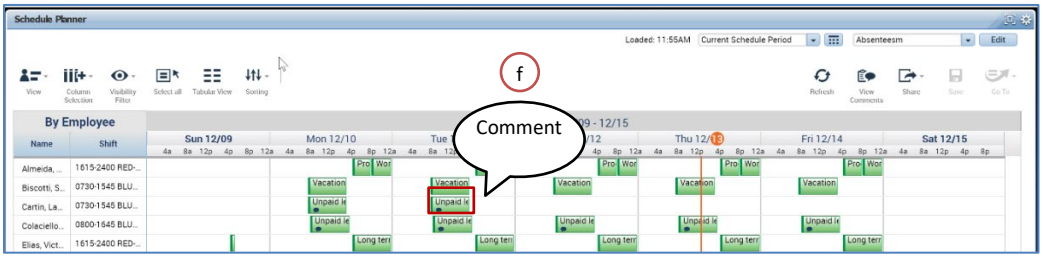
Comments can be added from different editors such as the Shift Editor or the Pay code editor when adding shifts and pay codes. The following steps applies to the Schedule Editor. It can also be added directly in the schedule.

a) Right-Click on a Shift cell and select **Edit**.



b) Select Add Comment.
c) Scroll to select the correct comment type.
d) Choose Note for a custom comment.
e) Enter comment detail then click Add. Your comment is now displayed in the schedule and in the Comment tab.
f) The comment will then be shown with a 💬 Comment Icon.

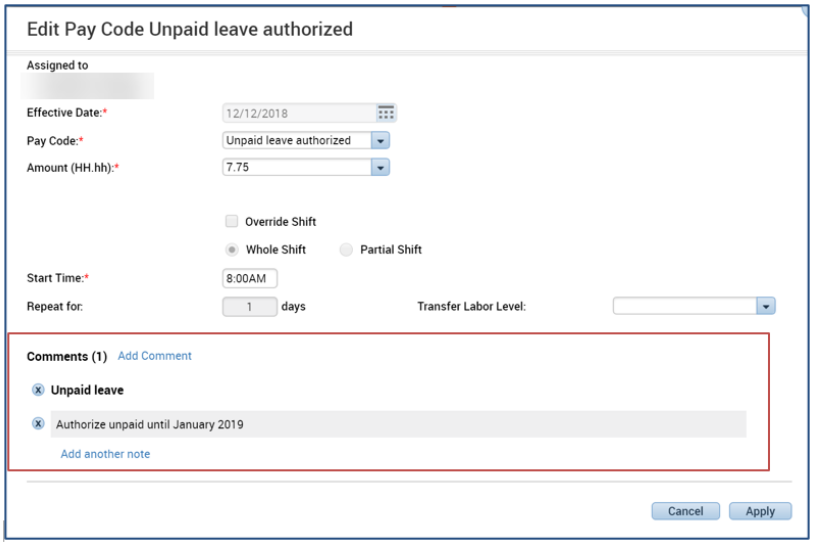




Delete a comment

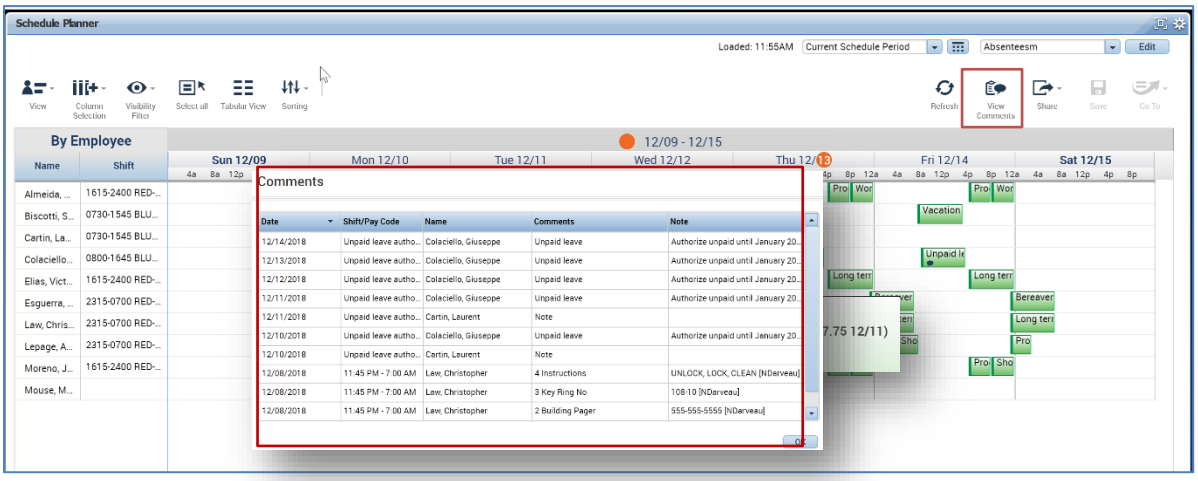
a) Right-Click on a Shift cell and select **Edit**.

b) Click on the ⓧ beside the comment to be deleting.



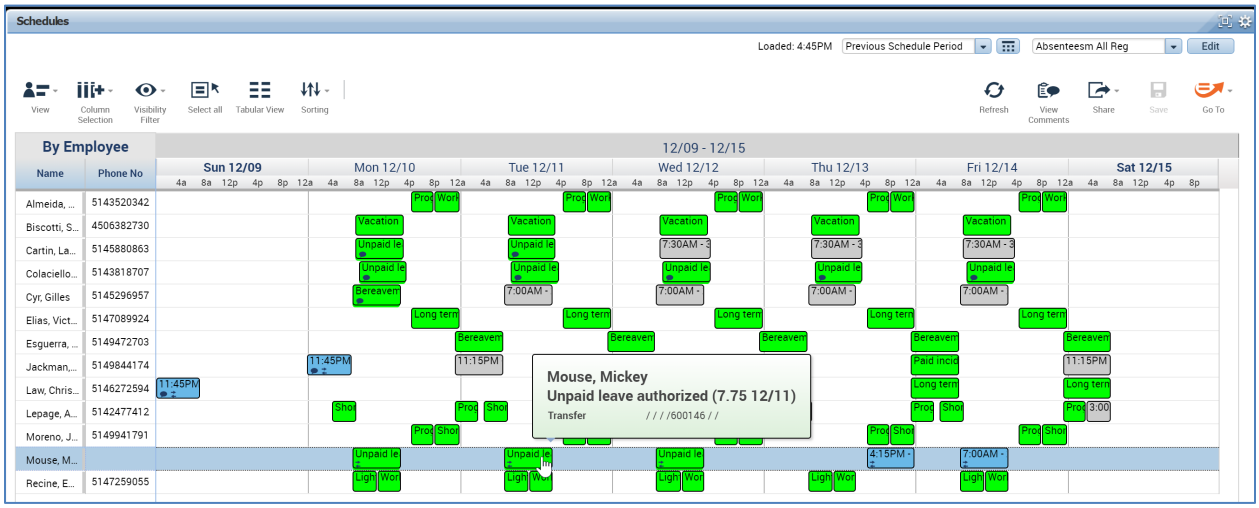
View All Comments

a) Click on a **View Comments** action button.



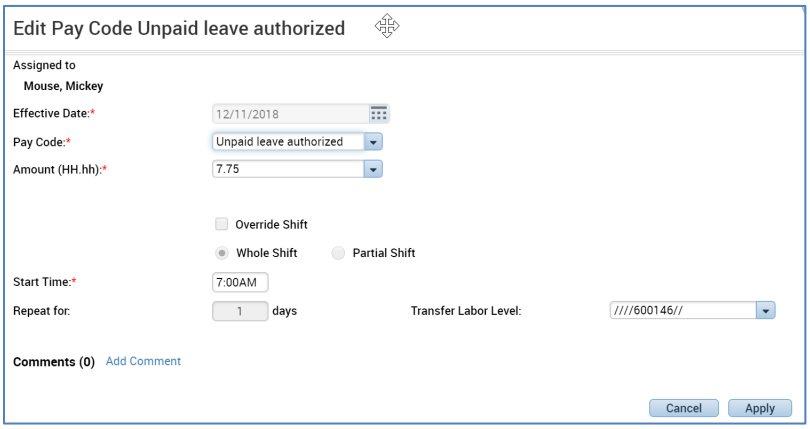
2.1.2. Review and edit Absence

a) From the Schedule Planner, select the **Absenteesm All Reg** hyperfind to review all the absences.

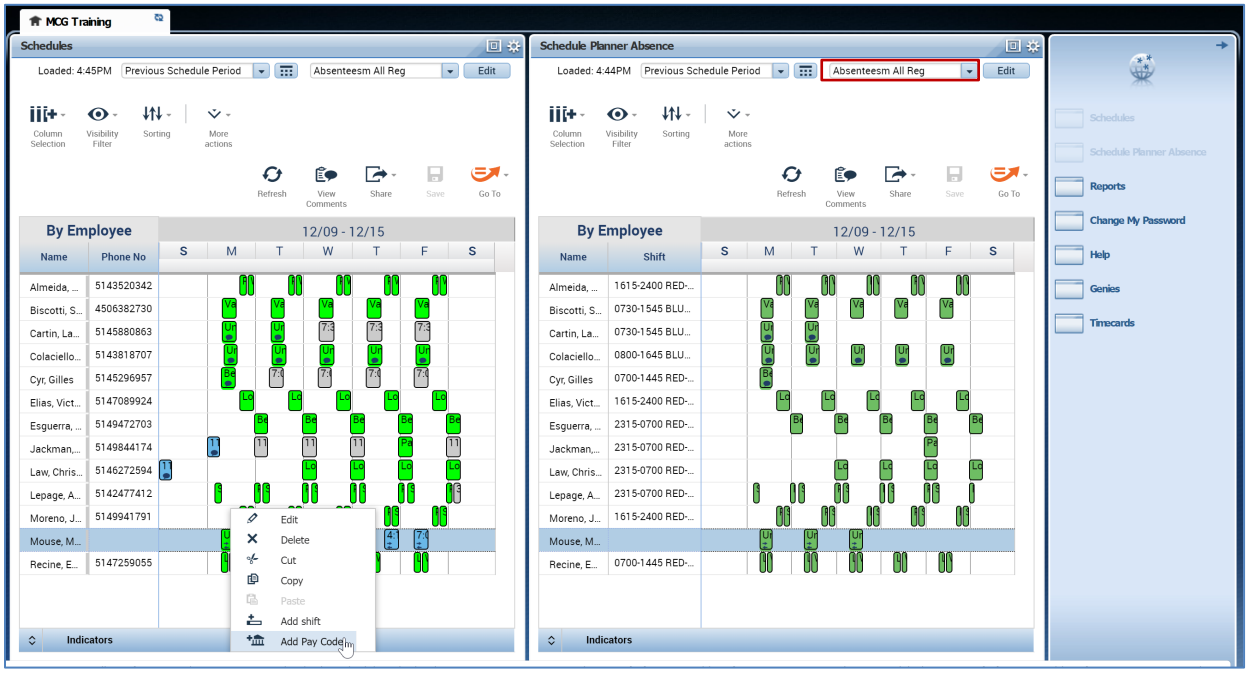


b) From the Schedules Widget Screen, select the Employee Absence Shift. Right-Click and select Edit.

c) From the Edit Pay Code Unpaid leave authorized screen, Enter the adjustments and click on Apply.



d) Click on Refresh to display the changes in the Schedule Planner Absence Widget.

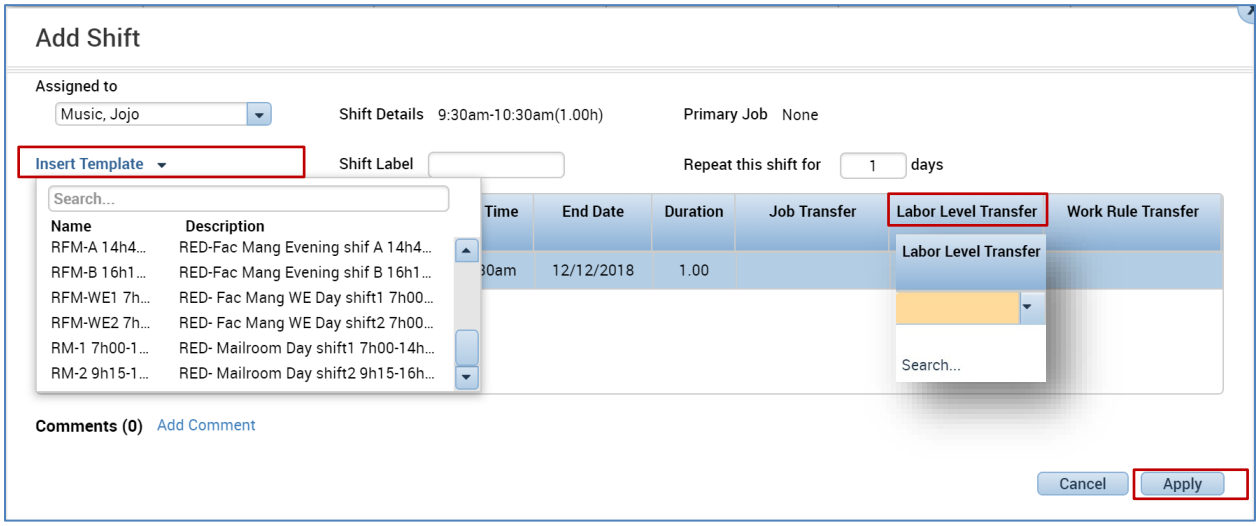


2.1.3. Assign Temporary Resources to Schedule or Shift Pattern

a) From the **Schedule Planner Absence** Widget, select the **Absentheeism All Reg** Hyperfind to view the regular employee's in absence then select the period.
b) From the **Schedule** Widget, select the **All Temp EE** Hyperfind to view the temporary employee's schedules then select the period.

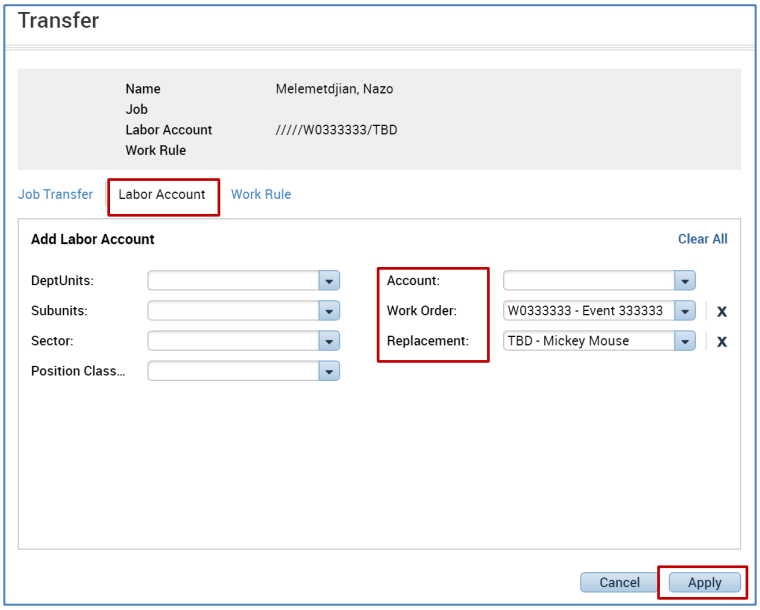
It is possible to choose the corresponding Hyperfind per sector.

c) Locate the corresponding Shift cell and select **Add shift**.
d) Insert the corresponding **Template** to the employee in absence.
e) From the **Labor Level Transfer** drop-down list, click on **Search**…then click on **Apply**.



2.1.4. Charge to proper Account

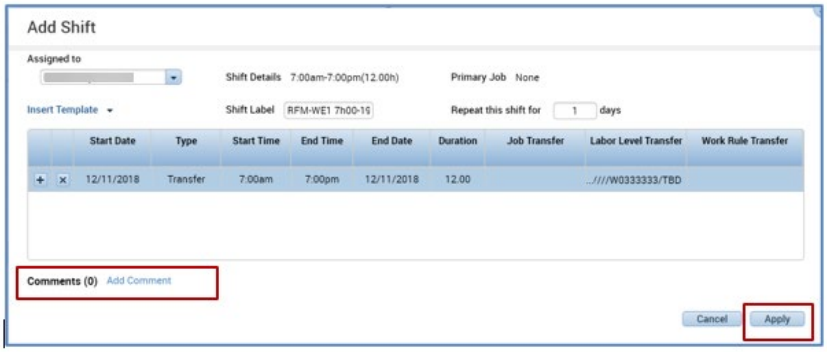
a) From the **Labor Account** tab, choose the corresponding **replacement**, then the proper **Account** and if needed, the **Work Order**.



b) The **Labor Level Transfer** is now displayed. Click on **Apply.**

A transfer is not a permanent change, it only affects the shift which the transfer is applied to.

c) Click on **Add a Comment**, then choose the corresponding **Comment Pay Code** from the drop-down absence list. Click on **Apply**.



d) Right-Click on the shift cell to view the Events (Transfer) look up information.

2.1.5 Review and print schedule

a) From the **Schedule Planner Absence** Widget, select the **All Temp EE** Hyperfind to view the temporary employee's schedules.
b) Select the period.
c) From the Schedule Widget, select the **All Temp EE** Hyperfind to view the temporary employee's schedules.
d) Select the period.
e) Review Schedule.
f) Click on Share to print schedule. Refer to Topic 3 – Reports for more information.

2.3 Review and Approve Time Cards

The timecards may be accessed from multiple widgets such as: Schedule, Quick Find and the Timecards.

2.2.1 Specify Pay Period.

a. Click on the **Pay Period** drop-down arrow.
b. From the Supervisor Workspace, select the **Timecards** Widget.
c. Select **Current Schedule Period**.
d. Or -

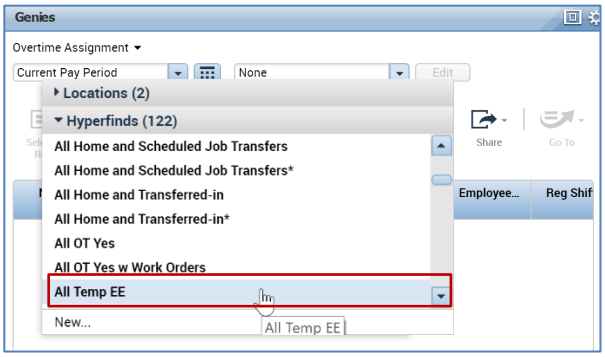
   From the **Calendar** icon, enter the **Start Date** and **End Date.**
e. Or -

   Click on the **Start Date Calendar** icon and select the date.
f. Click on the **End Date Calendar** icon and select the date.

- Select hyperfind (group) (Regular per sector, Temporary per sector, Absenteeism per sector)

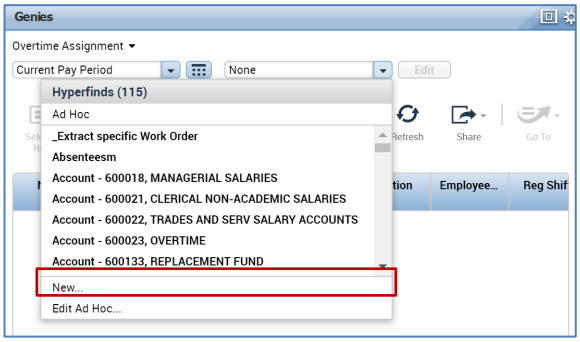
2.2.2. Choose an Hyperfind

a) From the Show field, select the Hyperfind in the drop-down menu to display the corresponding information such as All temp EE Schedules.

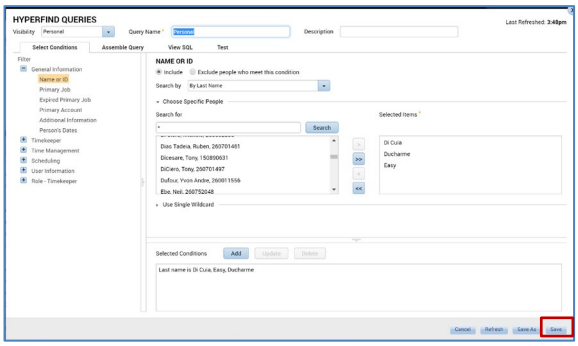


Create an Hyperfind

a) From the Show field, select **New** in the drop-down menu.



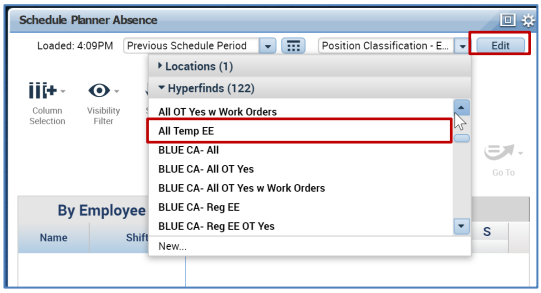
b) From the **Visibility** drop-down list, choose Personal if not showing by default.
c) Rename Personal from the **Query Name** field.
d) Proceed to all selections.
e) Click on **Save**.



Edit personal Hyperfind

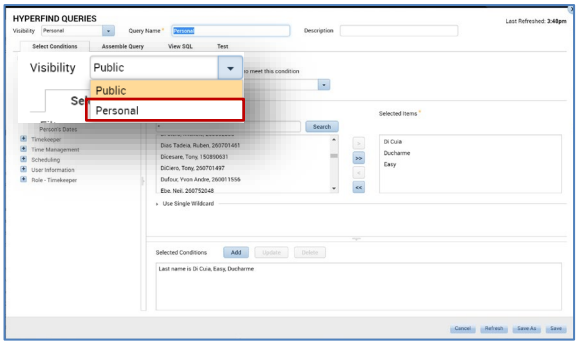
a) Select and click an Hyperfind to be edited then click on Edit.

b) Apply the different conditions then click **Add**.
c) Click on **Save**.



Copy and create a Public Hyperfind

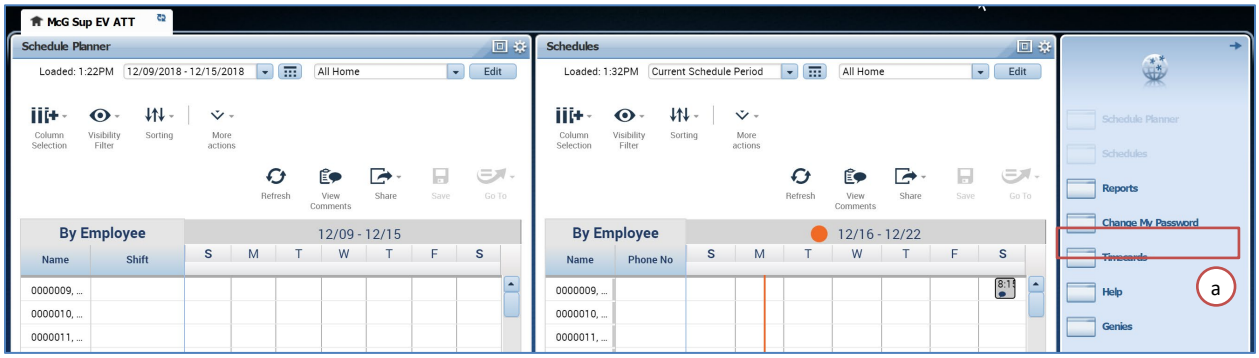
a) From the **Visibility** drop-down list, choose **Personal** if not showing by default.
b) Rename Personal from the **Query Name** field.
c) Proceed to all selections.
d) Click on **Save as**.



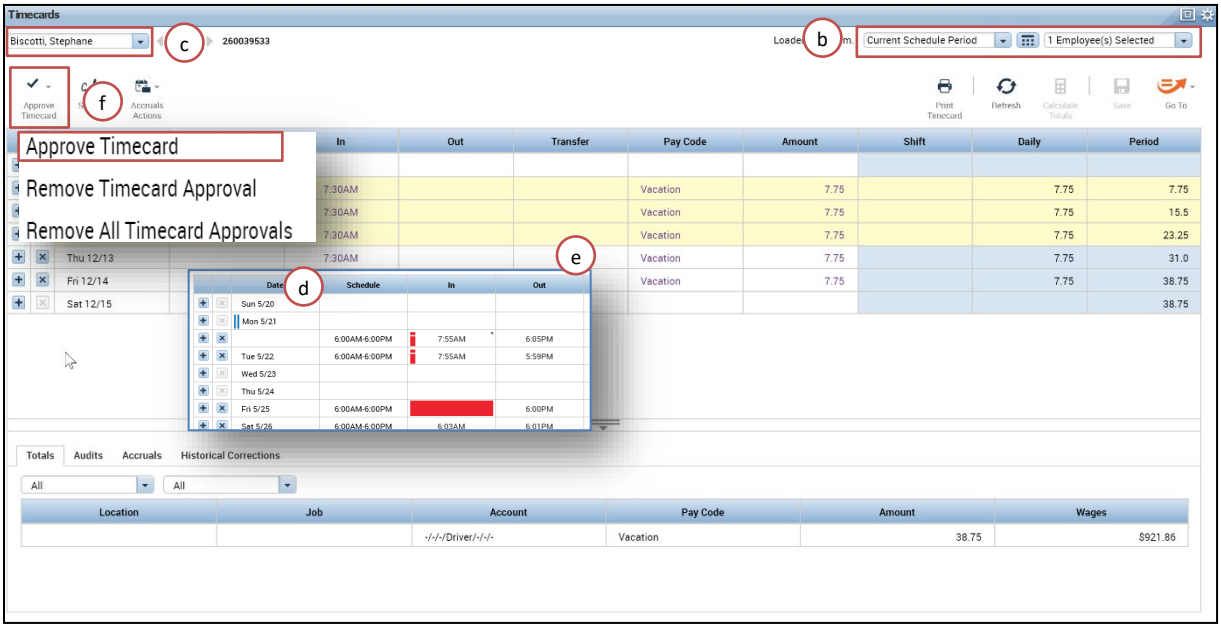
2.2.3. Approve Timesheets

This notion applies to the different shift events (absences, Overtime, etc.)

Access to Time Card Widget



a. From the **Show** drop-down, select the corresponding group of employees' Hyperlinks.
b. From the **employee** drop-down list, select the employee name.



Review Timecards

This step allows Timekeeper to review exceptions: Unexcused Absence, Unscheduled Hours, Vacation. Exceptions are flags or **markers** used to alert operators when employees work outside their assigned shifts.

c. Identify the exceptions flags or markers:
   - ☑ All items coming from the schedule are Purple.
   - ☑ If not coming from the schedule, all items are Black.
   - ☑ The Red Outline on the day means there is an Exception that day.

d. Modify the Timecards Shift and issue the corresponding actions:

ACTIONS	DEFINITION/FUNCTION
ADD A LINE	Click on ➕ to add one or more line(s) to insert the pay code per day.
COMMENT	Add or delete a comment or a note.

ACTIONS	DEFINITION/FUNCTION
UNEXCUSED ABSENCE	Add an unplanned absence code.
UNSCHEDULED HOURS	Add an unplanned UNSCHEDULED HOURS code.
WORK RULE TRANSFER	Click a Transfer cell to access the drop-down Transfer screen then select the appropriate work rule.

Move Amounts (Overtime)

a. Right-Click on **Amount**, then select the icon Move Amount.
b. Select the Date, the number of overtime hours to be moved and click **OK**.

Approved Timecard

a. Click on the **Approved Timecard** icon and choose Approved.

Signed Off

> It is important to signed off a Timecard. It prevents that another approver edits(delete, modify) the time card after approval.

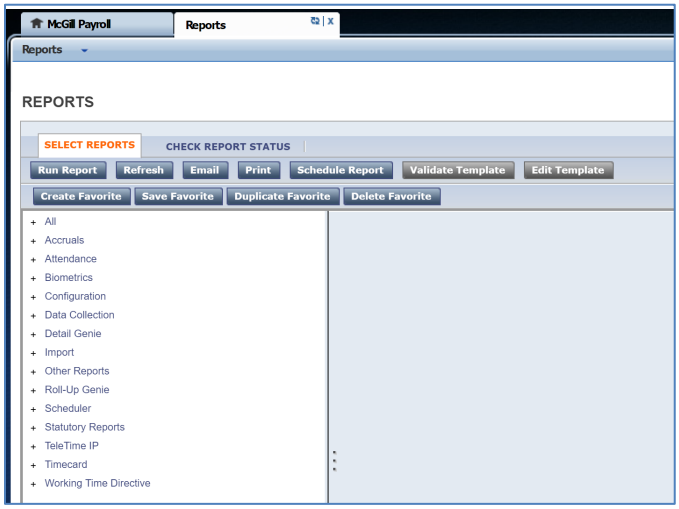
a. Access to Genies then select Time Card.
b. Select Approve icon then click on Signed Off.

Topic 3 Reports

3.1 Kronos Reports

3.1.1 Reports Overview

Reports allows the user to issue many types of reports corresponding to the supervisor tasks such as run a report, send a report per email and print a schedule report.



3.1.2. Print Reports

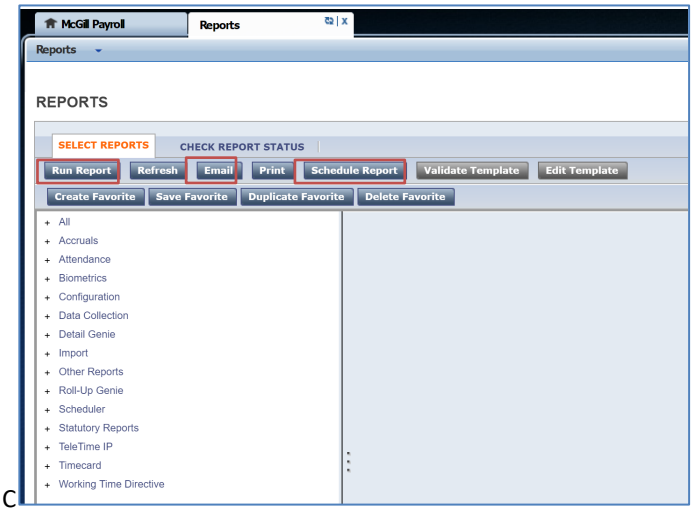
Run Reports

a) Click on **Select Report** tab.

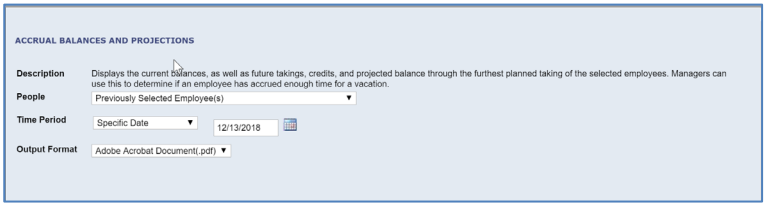
b) Click on the [+] signs to view the list of available Reports.

c) Select a report and the report criteria will appear on the right side.

d) Add your report criteria using the drop-down lists.



e) Click on the type of reports required such as **Run Report, Email or Schedule Report.**



Send Reports to Email

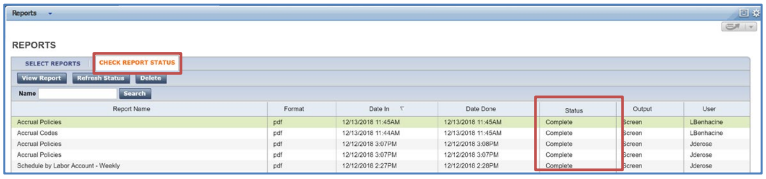
f) Click on **email** and send the email as your organization process.

Print Schedule Report

g) Click on **Schedule Report** and process as your organization process.

Review Report Status

h) Click on **Check Report Status** tab to view the Report status.

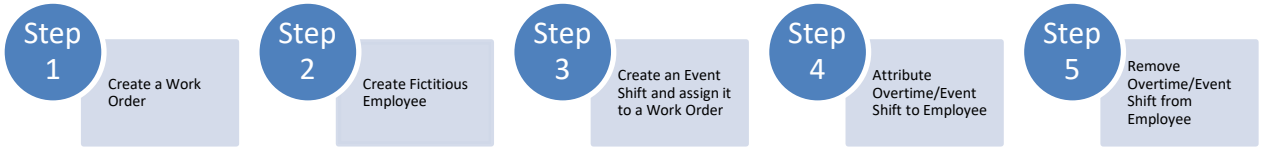


i) When ready a **Completed** status will appear in the status column.

Output Report format may vary from PDF, Excel or CSV

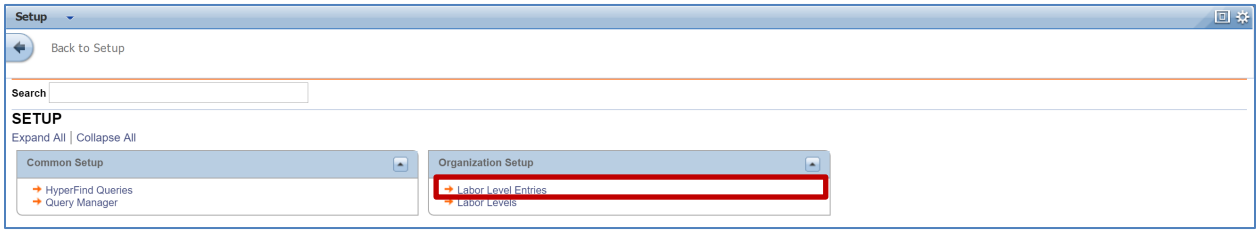
Topic 4 – Manage Overtime /Assign Resources to Work Order

This topic detailed the different **Overtime assignment** tasks in Kronos for McGill.

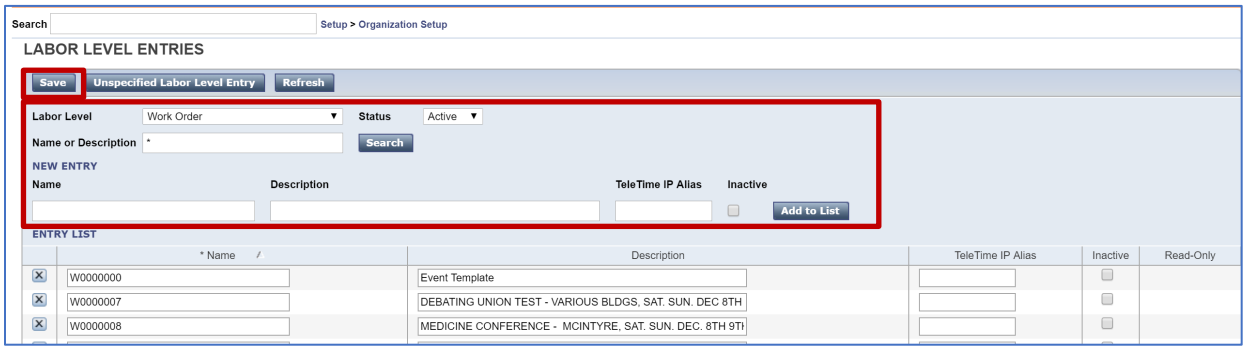


Step 1 - Create a Work Order

a. Access to the **Setup** Widget.
b. Select **Labor Level Entries** from the **Organization Setup** drop-down menu.



c. Select **Labor Level Entries** from the **Organization Setup** drop-down menu.
d. Choose **Work Order** from the **Labor Level** drop-down list.
e. Choose **Active** from the **Status** drop-down list then click on **Search** to view the active entry list by Name and Description.

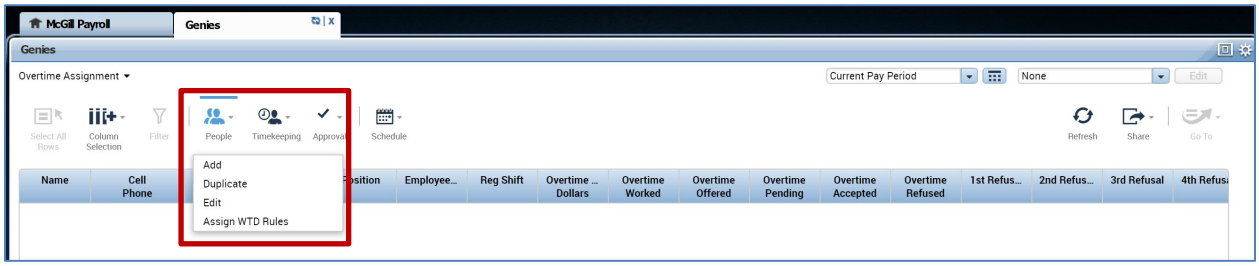


f. Enter the new Work Order **Name** starting by a **W** and followed by **8 numbers**. Per example W00000009.
g. Enter the Work Order **Description. Per example:** REGULAR BUILDING HOURS SAT. FY18-19.
h. Click on **Add to list** then **Save**.

Step 2 – Create Fictitious Employee

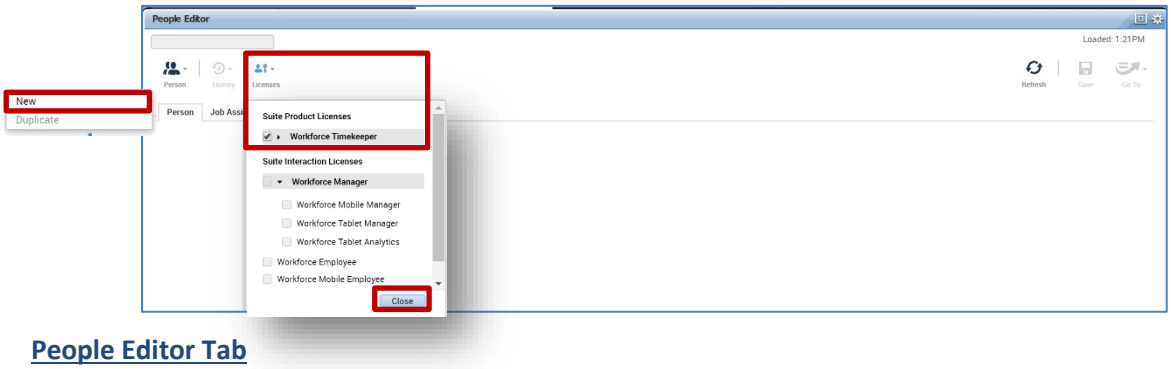
a. Access to **Genies**.

b. Click on **People** Icon and choose **Add**.



c. Right-click on the **Person** icon and choose **Add**.

d. Click on **Licenses icon**, check **Workforce Timekeeper** and then **Close**.



People Editor Tab

e. From the **People Editor** tab, complete the following **General** information section fields:

OBJECT	DEFINITION/FUNCTION
LAST NAME	Work Order number WITHOUT the 'W' Ex: 0000000
FIRST NAME	work order name or description
ID	Work Order with the 'W' Ex: W0000000
Hire/Active Date	Start date of the event (beginning date of a period)
Employment status section	Click on the '+' to add a row, click on the row to choose active or inactive. ▪ Active - same date as the hire date ▪ Inactive - end date of the event (has to be a Sunday)

f. Complete the following **Contacts** information section fields:

OBJECT	DEFINITION/FUNCTION
Address	Add a description of the event

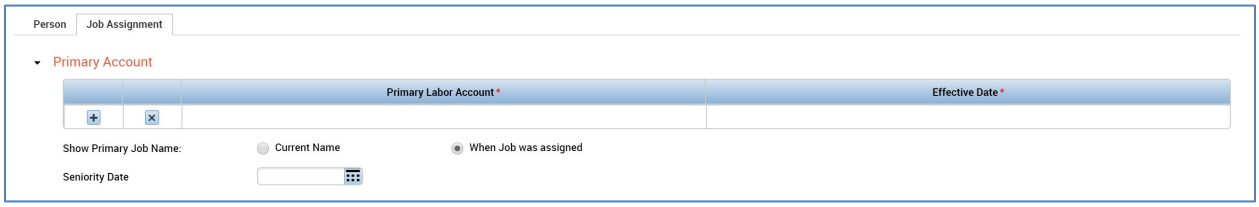
g. Complete the following **Additional Information** section fields:

OBJECT	DEFINITION/FUNCTION
Event Start Date Time:	YYYY-MM-DD HH:MM It is mandatory to respect the format of date and hours

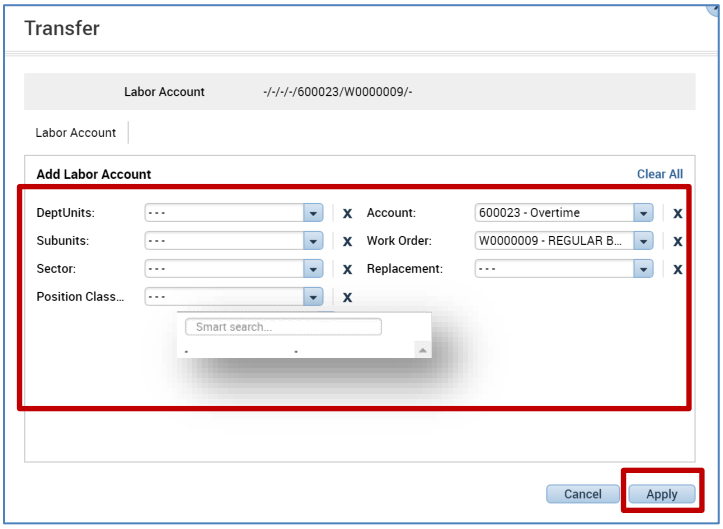
Event End Date Time	YYYY-MM-DD HH:MM It is mandatory to respect the format of date and hours

Job Assignment tab

h. Select the the Job Assignment tab



i. From the **Primary Account**, select **Search** from the Drop-Down list and complete the following section fields:



OBJECT	DEFINITION/FUNCTION
Dep Units, Subunits, Sector, Position Class, Replacement	Select the Dash – from the drop-down list.
Account	Select the corresponding Account number such as 600023 - Overtime.
Work Order	Select the corresponding new Work Order.

j. Click on **Apply**.

k. From the **Effective Date** field, choose the same date then the hire or active date (refer to step e).

l. Click on Save

.

Step 3 - Create an Event Shift and assign it to a Work Order

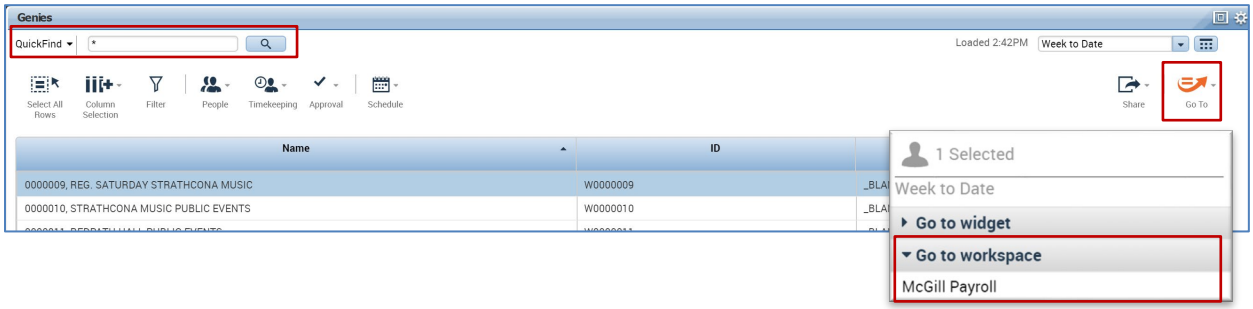
a. Access to **Genies**.

b. Select the **Quick Find** Genies from the drop-down list.

c. Insert a * then click on **Search** to locate the Fictitious Employee/Event created in step 1.

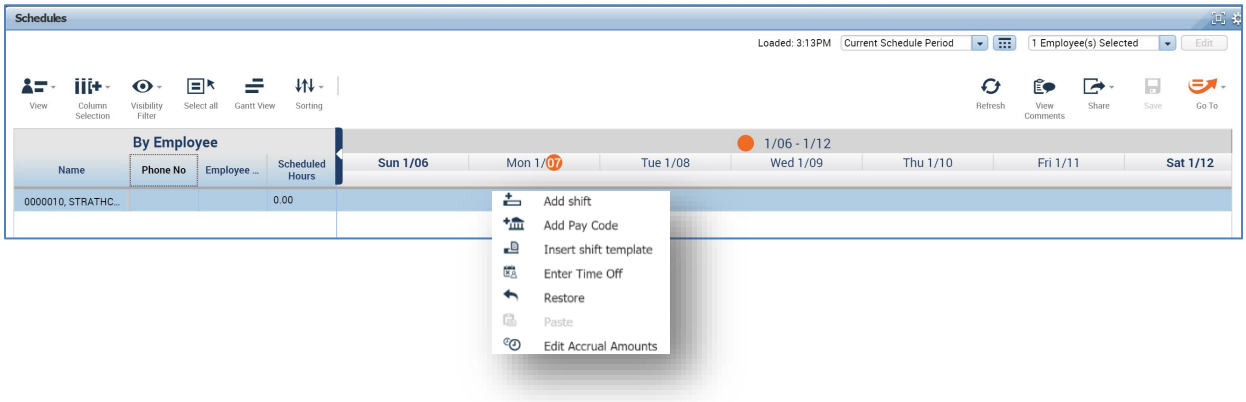
d. Select the employee then click on

.

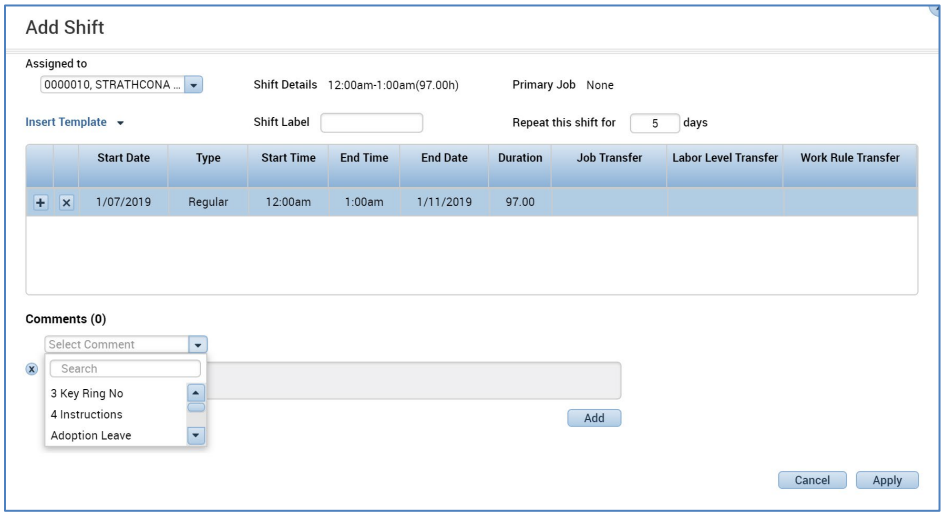


e. Select **Go to Workspace** then select **McGill Payroll** from the drop-down list to view the **Schedules** Widget.

f. Select the corresponding period/date.



g. Locate the corresponding Shift cell and select **Add shift**.



h. Enter the number of days to apply this shift.

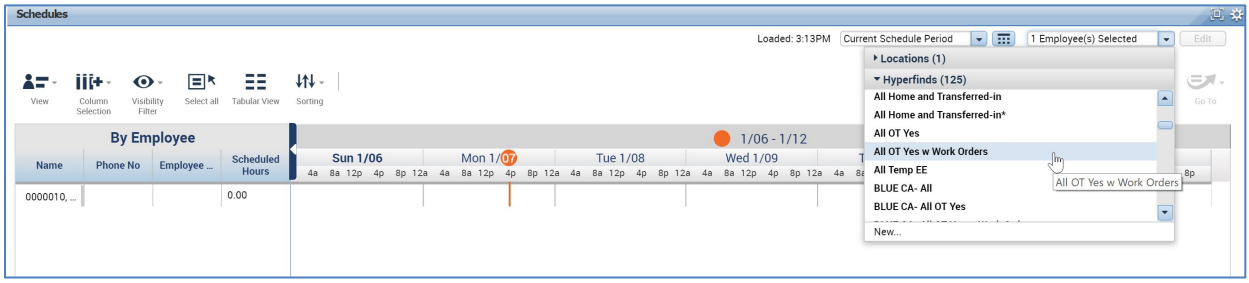
	When creating the shift, the number of repetition (days) allows to edit the selected shifts in one time.

i. Enter the Start Date and the Start Time then the End Date.
j. Enter the following 4 comments as per followed:

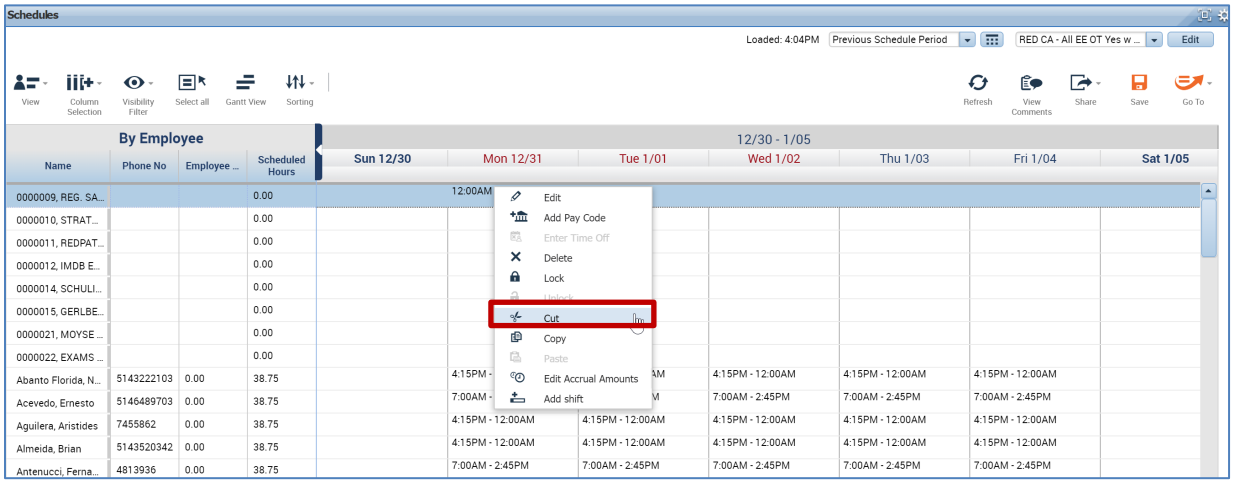
COMMENT	SELECT COMMENT
Comment 4 instructions	From the **Select Comment**, select **4 instructions**. Type a note (the instructions details) in note then click on **Add**.
Comment 3 Key Ring No	Click on **Add Comment.** From the **Select Comment**, select **3 Key Ring No**. Type a note (the Key Ring No description) then click on **Add**.
Comment 2 Building Pager	Click on **Add Comment.** From the **Select Comment**, select **2 Building Pager**. Type a note (the Building Pager number) then click on **Add**.
Comment 1 Building and Room	Click on **Add Comment.** From the **Select Comment**, select **1 Building and Room**. Type a note (the Building and Room).

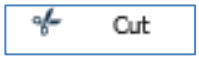
Step 4 - Attribute Event Shift to Employee(s)

a. Access to **Schedule widget**.
b. Select the corresponding Hyperfind such All OT Yes W Work Orders.



c. Click on the **Gantt View** icon.



d. Right click on the Event shift and select 

e. Locate and right-click on the corresponding employee shift then choose

.

f. Right Click on the pasted shift and click on

g. Select the corresponding **Work Rule Transfer**:

WORK RULE TRANSFER	DESCRIPTION
OVERTIME PENDING/OVERTIME	Overtime cannot be reached.
OVERTIME REFUSED, OR OVERTIME REFUSED LEGIT REASON	Overtime is refused.
BLUE OVT APPROVED, BLUE OVT SF-SAT APPROVED, GREEN OVT APPROVED, RED OVT APPROVED, BLUE BEFORE SHIFT APPROVED	Overtime is approved.

Step 5 - Remove Overtime/Event Shift from Employee

Change the Work Rule transfer to Overtime Refused

a. Locate and right-click on the corresponding employee shift

b. Right-click on the pasted shift and click on

.

c. Change the **Work Rule Transfer** for **Overtime Refused**.

Bring back the shift event as available

d. Right-click on the **Refused Shift** and click on

e. Locate and right click on the original event shift then click on

to bring back the shift event for a further assignment.

f. Right-click on the pasted shift then click on

and remove the Work Rule Transfer.

g. Click on Apply and Save

.

Add a Notice in the Employee Profile

a. Select the employee then click on

.

b. Select the Employee, then select the **People Editor**.

c. In the **Person** tab, click on **Additional information** section and enter the date of the refusal.

After 4 refusals change the Performs Overtime Yes to No.

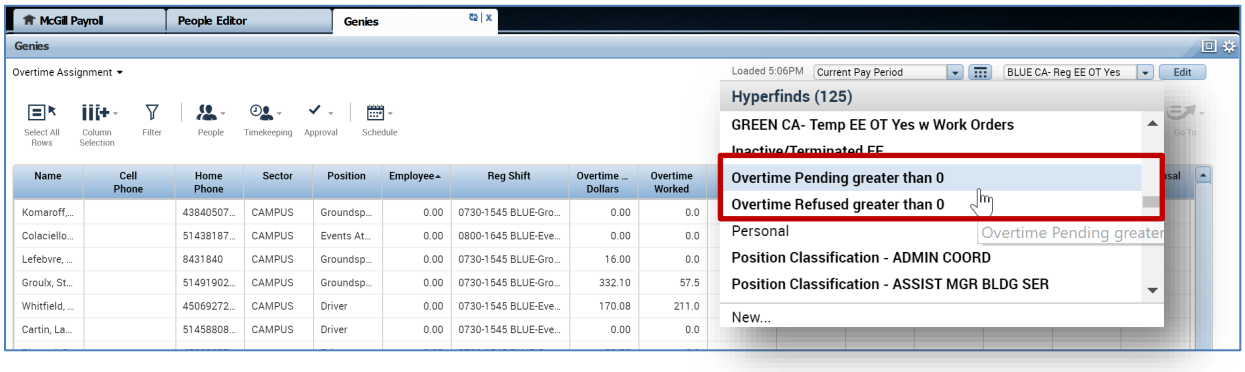
Topic 5 McGill Custom Reports and Interfaces

McGill custom Genies allows to generated specific information related to the Overtime, payroll or Accounting.

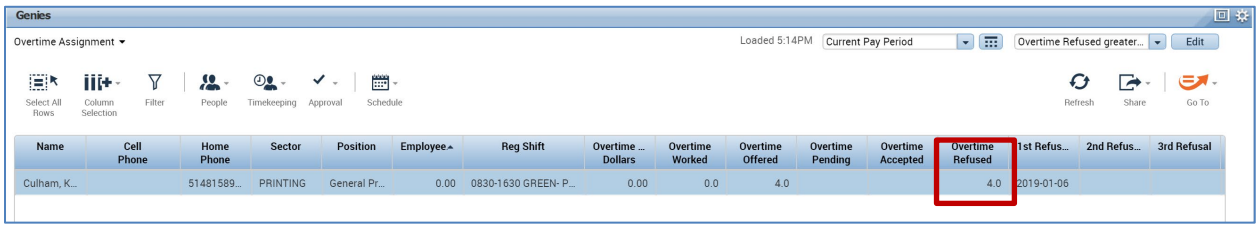
5.1. Overtime Assignment Genies (Report)

a. Access to **Genies**.

b. Select the **Overtime Pending greater than 0** or **Overtime Refused greater than 0**.

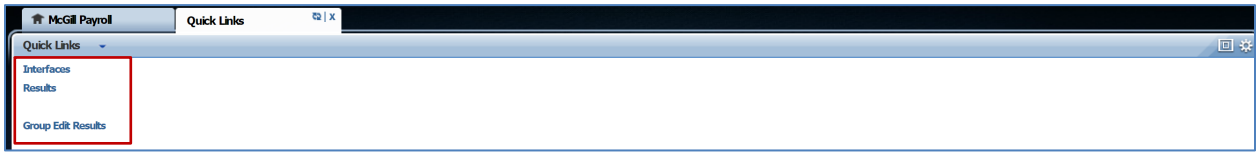


c. Review the Overtime Assignments.



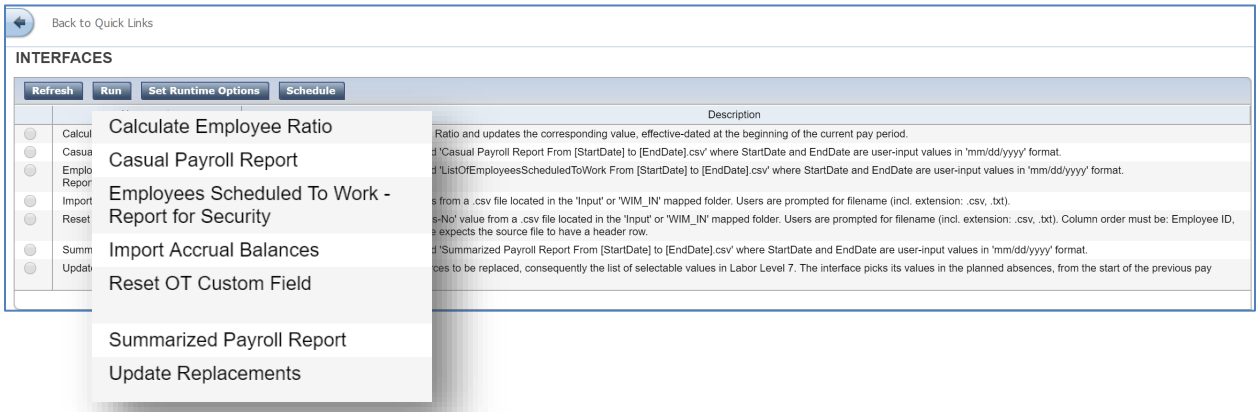
5.2. Quick Links (Interfaces)

Provides a quick access to tools organized by categories. All of them have been reviewed in this section.



Interfaces

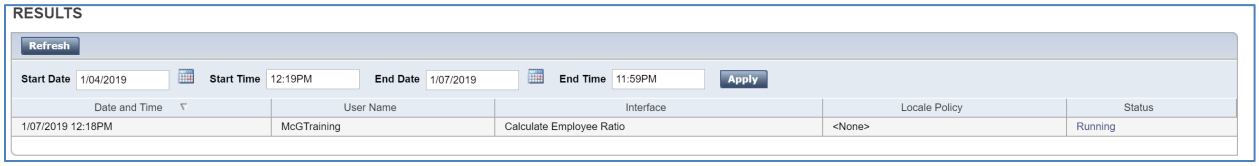
Provides a quick access to McGill payroll and accounting custom reports.

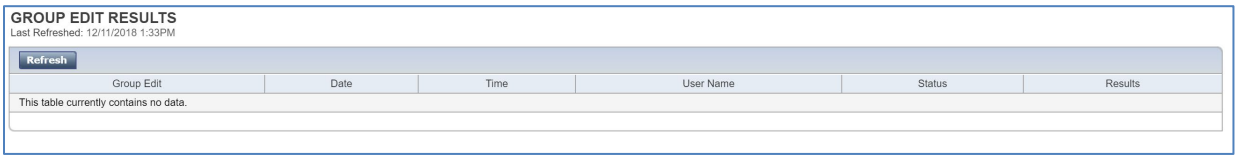


INTERFACE	DEFINITION/FUNCTION
Calculate Employee Ratio	This interface calculates the Employee Ratio and updates the corresponding value, effective-dated at the beginning of the current pay period.
Casual Payroll Report	This interface extracts a .csv file named 'Casual Payroll Report From [StartDate] to [EndDate].csv' where StartDate and EndDate are user-input values in 'mm/dd/yyyy' format.
Employees Scheduled To Work - Report for Security	This interface extracts a .csv file named 'ListOfEmployeesScheduledToWork From [StartDate] to [EndDate].csv' where StartDate and EndDate are user-input values in 'mm/dd/yyyy' format.
Import Accrual Balances	This interface imports Accruals Balances from a .csv file located in the 'Input' or 'WIM_IN' mapped folder. Users are prompted for filename (incl. extension: .csv, .txt).
Summarized Payroll Report	This interface extracts a .csv file named 'Summarized Payroll Report From [StartDate] to [EndDate].csv' where StartDate and EndDate are user-input values in 'mm/dd/yyyy' format.
Update Replacements	This interface updates the list of resources to be replaced, consequently the list of selectable values in Labor Level 7. The interface picks its values in the planned absences, from the start of the previous pay period to the end of the next.

Results

Allows to view the interfaces result (status) per Start Date/Time and End Date/Time.



Group Edit Results (Signed Off detail + Overtime refusal)

Allows to view the different events edited such as Overtime refused by employees.