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.

Ic ons	Description
ین ا	More information, comment, note.
i	Alert recommending awareness when doing the task.
	Sample task scenario/example
	Supervisor
	Supervisor – Super User
\$0	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
- \square 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: <u>http://qkronos.campus.mcgill.ca/wfc/logon</u>

- a) The Kronos logon page will appear.
- 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.

KRONOS"	
	QA Workforce Central Version 8.1.2
User Name	QA Environment Environnement de QA
Password	
English Français Canada	

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



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 Impaid 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.

chedule Planner)				Loaded: 11:55AM	Current Schedule Period	Absenteesm	三 杂 V Edit	
View Column Visibility Select all Tabular	ficw Sorting					Re	Comments	Save Go To	
By Employee				1 12/00	10/15				
Name Shift Sun 12/	09 By E	mployee				12/09 - 12/15			
4a 8a 12p	Ap 8p Name	Shift	Sun 12/09	Mon 12/10	Tue 12/11 Carti	in, Laurent	2/13	Fri 12/14	Sat 12/15
Imeida, 1615-2400 RED iscotti, S 0730-1545 BLU 11	Almeida,	1615-2400 RED	\frown	Progressive return to work [3.7! Work accident ben. [4.0]	Progressive return to Unpa Work accident ben. Comm	aid leave authorized (7.7 ents (1)	75 12/11) irn to work (3.7 en. [4.0]	Progressive return to work [3.7! Work accident ben. [4.0]	
artin, La 0730-1545 BLU	Biscotti, S	0730-1545 BLU	(1.2)	Vacation [7.75]	Vacation [7.75]	1		Vacation [7.75]	
laciello 0800-1645 BLU	Cartin, La	0730-1545 BLU	\bigcirc	Unpaid leave authorized [7.75](Unpaid leave authorized [7.75]	C			
as, Vict 1615-2400 RED	Colaciello	0800-1645 BLU		Unpaid leave authorized [7.75]	Unpaid leave authorize [7.75]	(Unpaid leave authorized [7.75](Unpaid leave authorized [7.75]	(Unpaid leave authorized [7.75](
guerra, 2315-0700 RED	Elias, Vict	1615-2400 RED	Long term disability [0.0]	Long term disability [7.75]	Long term disability [7.75]	Long term disability [7.75]	Long term disability [7.75]	Long term disability [7.75]	
w Chris 2315-0700 RED	Esguerra,	2315-0700 RED		Bereavement 5 [7.75]	Bereavement 5 [7.75]	Bereavement 5 [7.75]	Bereavement 5 [7.75]	Bereavement 5 [7.75]	
2315/0700 RED.	Law, Chris	2315-0700 RED		Long term disability [7.75]	Long term disability [7.75]	Long term disability [7.75]	Long term disability [7.75]	Long term disability [7.75]	
Ioreno, J 1615-2400 RED	Lepage, A	2315-0700 RED		Short term dis. Ben. Claim [4.0] Progressive return to work [3.7	Short term dis. Ben. Claim [4.0 Progressive return to work [3.7	Short term dis. Ben. Claim [4.0] Progressive return to work [3.7!	Short term dis. Ben. Claim [4.0 Progressive return to work [3.7	Short term dis. Ben. Claim [4.0] Progressive return to work [3.7!	
louse, M	Moreno, J	1615-2400 RED		Progressive return to work [3.7 Short term disability [4.0]	Progressive return to work [3.7 Short term disability [4.0]	Progressive return to work [3.7! Short term disability [4.0]	Progressive return to work [3.7 Short term disability [4.0]	Progressive return to work [3.7! Short term disability [4.0]	
	Mouse, M.,			Unpaid leave authorized [7.75](Unpaid leave authorized [7.75]	Unpaid leave authorized [7.75]			
	Becine, E.	0700-1445 RED		Light duties ben. Claim [4.0]	Light duties ben. Claim [4.0]	Light duties ben. Claim [4.0]	Light duties ben. Claim [4.0]	Light duties ben. Claim [4.0]	
				Work accident [3.75]	Work accident [3.75]	Work accident [3.75]	Work accident [3.75]	Work accident [3.75]	

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

Time	Timecards										
Bisc	jiscotti, Stephane 🔽 🔹 1 of 1 🕨 260039533										
Γ,											
Aj Tir	Approve Sign Off Accruits Sign Off Accruits Go To Transard Transard Transard										
		Date	Schedule	In	Out	Transfer	Pay Code	Amount	Shift	Daily	Period
+	\times	Sun 12/09									
+	×	Mon 12/10		7:30AM			Vacation	7.75		7.75	7.75
÷	×	Tue 12/11		7:30AM			Vacation	7.75		7.75	15.5
+	×	Wed 12/12		7:30AM			0	7.75		7.75	23.25
+	×	Thu 12/13		7:30AM				7.75		7.75	31.0
+	×	Fri 12/14		7:30AM			Vacation	7.75		7.75	38.75
÷	×	Sat 12/15									38.75
_	_	6				_					
(3 1	Ň									
	-					C					
F											
T	otals	Audits Accruals	Historical Corrections								
	All		All	•							
	Location Job Account PayCode Amount Wages										jes
////Driver///- Vacation 38.75								\$921.86			

1.3.4. Timecard Details



USING KRONOS FOR SUPERVISOR

Totals Audi	Accr 3.2	2 storical Corre	ctions												
Date	Time	Туре	Account	Pay Code	Amount	Work Rule	Override	Include in Totals	Effective Date	Comment	Edit Date	Edit Time	User	Data Source	
12/13/20	7:30AM	Add Pay		Vacation	full sche						12/06/20	3:27PM (Sarmient	Scheduli	
12/14/20	7:30AM	Add Pay		Vacation	full sche						12/06/20	3:27PM (Sarmient	Scheduli	
12/10/20	7:30AM	Add Pay		Vacation	full sche						12/06/20	3:27PM (Sarmient	Scheduli	-

Accrual Code Accrual Available Balance Accrual Units Accrual Reporting Period Accrual Opening Balance Accrual Ending Balance ACCUMULATED BORROWED TIME 0.0 Hour Fris 6/01 - Fri 5/31 0.0 0 ADOPTION LEAVE DAVS 7H45 0.0 Day Fris 6/01 - Fri 5/31 0.0 0 Imployee Ratio 0.00 Money Fris 6/01 - Fri 5/31 0.00 0						
	Accrual Code	Accrual Available Balance	Accrual Units	Accrual Reporting Period	Accrual Opening Balance	Accrual Ending Balance
	ACCUMULATED BORROWED TIME	0.0	Hour	Fri 6/01 - Fri 5/31	0.0	0.0
	ADOPTION LEAVE DAYS 7H45	0.0	Day	Fri 6/01 - Fri 5/31	0.0	0.0
	Employee Ratio	0.00	Money	Fri 6/01 - Fri 5/31	0.00	0.00
	MARRIAGE DAYS 7H45	0.0	Day	Fri 6/01 - Fri 5/31	0.0	0.0

Totals Audits Detail View	Accruals Histo Summary View	orical Corrections	3.4			•					Untot	alized Correction
Pending	Historical Date	Type of Edit	Pay Code	Amount	Wages	Account	Comment	Note	User	Edit Date	Effective Date	Include in Totals
						No data to display						

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.



A McGill Payroll	Change My Password		
Change My Passwo	ord 👻		\$
CHANGE PAS	SWORD		
Save Clear			
User Name	McGTraining		
Old Password	Required		
New Password	Required		
Verify Password	Required		
	The password is limited by the follo	wing:	
-	Minimum length: 6		

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).

A McGill Payroll	Reports 🖘 X
Reports 👻	
REPORTS	
SELECT REPORTS	CHECK REPORT STATUS
Run Report Refresh	Email Print Schedule Report Validate Template Edit Template
Create Favorite Save	Favorite Duplicate Favorite Delete Favorite
+ All	
+ Accruals	
+ Attendance	
+ Biometrics	
+ Configuration	
+ Data Collection	
+ Detail Genie	
+ Import	
+ Other Reports	
+ Roll-Up Genie	
+ Scheduler	
+ Statutory Reports	
+ TeleTime IP	
+ Timecard	
+ Working Time Directive	

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.

R MCG Training Genies	i x						
Genies							0 \$
Seniority List Summarized		Loaded 1:32PM	Current Pay Period	• =	All Temp EE	•	
Seniority List Summariz	ed 🕶				Refresh	Share	Go To
Seniority List Summa	rizelm	Date of hire		A	ccumulated Seinority		
QuickFind	Ŭ						
Absenteeism Report							
Esguerra, Joseph	260813687						
Esguerra, Melanie	260757758						
Espinoza perez, Verenice	260877197						
Melemetdjian, Nazo	260880888						
Mendez Moutela, Carlos	260873056						



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.

A MCG Training	Genies	x S			
Genies					
QuickFind - *m	્ર			Loaded 1:36PM Week to Date	• =
Select All Selection Filter	People Timekeeping	✓ ✓		Share	🛃 - Go To
	Na	me	ID	Pay Rule	Totals Up To Date
Culham, K			150801664	GREEN REGULAR	~
Ghansam			260192538	RED REGULAR	~
Rahim, Ve			150124770	RED REGULAR	~ ~

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.

HYPERFIND QUERIES	Name * Personal	Description	Last Refreshed: 3:25pm
Select Conditions Assemble Query Filter General Information 2 Primary Job Expired Primary Job Primary Account 3 Additional Information Person's Dates Timekeeper Hire Date Employment Statu Employment Term 4	View SQL Test NAME OR ID Include Exclude peo Search by By Last Name Choose Specific People Search for *	PRIMARY ACCOUNT PRIMARY ACCOUNT PRIMARY ACCOUNT Summary Deptimins Subunits Sector Position Cl Account Work Order Replacement Subunits Subunits Sector Position Cl	
EMPLOYMENT STATUS Include Exclude people who meet this c Status: Active As of Today Specific Date 12/18/20	and ition and iting and it	Account Replacement Therew Date As of taking Add Update Delete	
			Cancel Refresh Save As Save



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.

Schedules								第 三
					Loaded: 10:46	Current Schedule Period	All Temp EE	▼ Edit
View C	Column Selection	Select all Tabular Vie	w Sorting		b	Previous Schedule Period Current Schedule Period Next Schedule Period Week to Date	resh Start Date: End Date:	Select Dates
By Em	nployee				12/09 - 1:	Last Week		
Name	Phone No	Sun 12/09	Mon 12/10	Tue 12/11	Wed 12/12	Yesterday	Fr	Cancel
Castillo m Constanti Di Cuia, R Ebe, Neil Esguerra, Esguerra, Espinoza Melemetd Mendez Mouse, M			(7:30 - 13) [Unpaid] (15:15-1		(Unpaid)	Vesterday, Today, Tomorrow Yesterday plus 6 days Last 30 days	[<u>7:00-1</u>]	Su Mo We Th Fi Sa Su Mo Yu We Th Fi Sa 25 26 27 28 29 30 1 25 26 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 26 17 18 19 29 21 22 23 24 25 26 27 28 29 20 31 1 2 3 4 5
Mouse, M							10.13	<u></u>
IVIUSIC, JOJO								
Patton, D								
India	cators					N		



- 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.

A McGil Pa	iyrol	Schedule	Planner 🔤 🛛 🗙												
Schedule Pla	nner														
									Loaded: 2:02PM	Current Schedule Pe	riod 🔽 🔝	Absentee	esm	•	Edit
5	▲= • II	+ 0		tt -							0	Î.	C + ·		=1.
Quick Actions	View Co Sele	lumn Visibility ection Filter	Select all Tabular View S	orting							₿ Befresh	View Comments	Share		
E	By Employe	e						0 12/0	9 - 12/15						
Name	Phone No	Employee _	Sun 12/09	Mon 12/10	8p 12a 4a	Tue 12/1	1 40 80 12a	Wed 12	40 80 12a 4a	Thu 12/13	Fri 12	/14 40 80 1	2a 4a 8	Sat 12/15	80
Colaciello_	5143818707	0.00		Unpaid I		Unpaid I		Unpaid		Unpaid I	Unpa	id I			
Elias, Vict	5147089924	0.00			Long ter		Long ter		Long ter	Long ter		Long ter			
Law, Chris	5146272594	0.00			Long	ter	Ľ	ong	Lanata	2	Long ter	Sec. 1	Long ter		
Moreno, J	5149941791	0.00			Pro Shc		Prc Shc	5	Edit	Sho		Prc Shi			
Mouse, M.,		0.00		Unpaid I		Unpaid I		×	Delete						
Lepage, A	5142477412	0.58		She	Pro	She	P	10	Cut		Pro Sho		Pro		
Esguerra,	5149472703	0.60			Berea	ve	8	ere 6	Cut		Bereave		Bereave		
Almeida,	5143520342	0.70			Pro Wo		Prc Wo	Ð	Сору	Wo		Prc Wo			
Biscotti, S.,	4506382730	1.00		Vacation		Vacation		6	Paste		Vacat	101			
								<u></u>	Add shift						
India	cators							* m	Add Pay	Code					

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



Accigned to			
Assigned to			
Effective Date:*	12/10/2018		
Pay Code:*	2nd January	2	
Amount (HH.hh):*	Full sched day Half sched day	3	
	Override Shift Whole Shift Par	tial Shift	
Start Time:*	11:15PM	5	
Repeat for:	1 days 6	Transfer Labor Level:	
Comments (0) Add Comments (0) Comments (0) Select Comment Comm	nent •	8	Cancel

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	Select Full Schedule Day if the absence cover a full day.
HALF SCHED 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.

chedule Pla	nner	- 22								_		
							Loade	d: 2:02PM Current Schedule Per	iod 🔽 🔝	Absent	teesm	• Edit
Guick Actions	View Cal	+ • • • • umn Visibility ction Filter	Select all Tabular View Sort	- ng					O Refresh	View Comment	Share S	
E	By Employe	e I				0 12/	09 - 12/1	5				
Name	Phone No	Employee _	Sun 12/09 4a 8a 12p 4p 8p 12a	Mon 12/10 4a 8a 12p 4p 8p 1	Tue 12/11 2a 4a 8a 12p 4	Wed 1	2/12 40 80	Thu 12/13 12a 4a 8a 12p 4p 8p 12a	Fri 12	14 Ro	Sat 12	2/15
olaciello_	5143818707	0.00		Unpaid I	Unpaid I	2	0	Edit		9	Edit	
lias, Vict	5147089924	0.00		Long te		Long ter				×	Delete	
aw, Chris	5146272594	0.00			Long ter	Long ter	×	Delete	ig ter	\sim	Delete	
loreno, J	5149941791	0.00		Pro Sh		Prc Site	%	Cut	4	<i>*</i> -	Cut	
louse, M.,		0.00		Unpaid I	Unpaid I	La	æ	0		Ð	Comu	
epage, A	5142477412	0.58		She	Pro Sho	Prc Shc	C ²	Сору	Shc	5	Сору	
sguerra,	5149472703	0.60			Bereave	Bereave	G.	Paste	eave		Paste	
Jmeida,	5143520342	0.70		Pro Wo		Prc Wol	+	Add shift		+	Add abift	
liscotti, S	4506382730	1.00		Vacation	Vacation	V4		Add Shirt			AUU SNIT	
							* m	Add Pay Code		1	Add Pav Co	ode

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 \mathbf{P} Comment Icon.



	0	-	Shift Details	7:30am-3:45pi	m(8.25h)	Primary	Job None		
isert Tem	plate 👻		Shift Label	BE-B 7h30-15h	45	Repeat	this shift for	days	
	Start Date	Туре	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+ ×	12/10/2018	Transfer	7:30am	3:45pm	12/10/2018	8.25		/////150104797	
omment	b s (0) Add Comr	nent	C Select Com Add note C C Select Com Add note	elect Comment Search ote ut of town			Add	Ca	ncel Apply
		Comments (1)	Add Comment Pa	aid incidental	•				ancel Apply

Schedule Pla	nner																								Q
													Load	ed: 11:55	AM C	urrent Sc	hedule Pe	eriod	•	Abs	entee	sm		•	Edit
View S	Column Visibility Selection Filter	Scleet all Tabu	lar View	↓†↓ + Sorting	10					(f								C Refresh	View Commit	v ents	Share	Sav		Co To
By E	Employee								1	Com	mont	09 -	12/15												
Name	Shift	Sun 1 4a 8a 12	2/09	8p 12a	4a	Mon 12/1 8a 12p 4	0 p 8p 12a	4a	Tue 1 8a 12p	Com	ment	/12	8p 12a	4a 8	hu 12	4p 8	p 12a	40 8	Fri 12/14	4 4p 8p	12a	4a 8a	at 12/1	5 1p 8	p
Almeida,	1615-2400 RED						Pro Wor				/		Pro Wor			Pro	Wor			Pro W	Vor				_
Biscotti, S	0730-1545 BLU					Vacation			Vacation	\mathcal{N}	Va	cation			Vacatio	0			Vacation	-					
Cartin, La	0730-1545 BLU					Unpaid k			Unpaid k																
Colaciello	0800-1645 BLU					Unpaid le			Unpaid le		U	npaid le			Unpaid	T I E			Unpaid le						
Elias, Vict	1615-2400 RED					-	Long terr			Long terr			Long terr			Lon	g terr			Long to	err				

Delete a comment

- a) Right-Click on a Shift cell and select **Edit**.
- b) Click on the $\overline{\mathbf{x}}$ beside the comment to be deleting.

Edit Pay Code Unp	oaid leave authorized		
Assigned to			
Effective Date:*	12/12/2018	=	
Pay Code:*	Unpaid leave authorized	•	
Amount (HH.hh):*	7.75	•	
	Override Shift		
	Whole Shift	artial Shift	
Start Time:*	8:00AM		
Repeat for:	1 days	Transfer Labor Level:	
Repeat for: Comments (1) Add Comme & Unpaid leave	1 days	Transfer Labor Level:	•
Repeat for: Comments (1) Add Comme & Unpaid leave & Authorize unpaid until J	1 days ent	Transfer Labor Level:	



View All Comments

a) Click on a View Comments action button.

Schedule Plar	nner						Loaded: 11:55AM	urrent Schedule Period	Absente	esm 🗣	Edit
View of Si	Column Visibility	Select all Tabular V	fiew Sorting	e -					Refreah	Share Save	Со То
By E	mployee						12/09 - 12/15				
Name	Shift	Sun 12/	09	Mon 12/10	Tue	12/11	Wed 12/12 Thu 12	/13	Fri 12/14	Sat 12/15	
		4a 8a 12p	Comments					4p 8p 12a 4a	8a 12p 4p 8p 12a	4a 8a 12p 4p	8p
Almeida,	1615-2400 RED								FIG. WO		
Biscotti, S	0730-1545 BLU		Date	 Shift/Pay Code 	Name	Comments	Note	-	Vacation		
Cartin, La	0730-1545 BLU		12/14/2018	Unpaid leave autho	Colaciello, Giuseppe	Unpaid leave	Authorize unpaid until January 20				
Colaciello	0800-1645 BLU		12/13/2018	Unpaid leave autho	Colaciello, Giuseppe	Unpaid leave	Authorize unpaid until January 20		Unpaid Ic		
Elias, Vict	1615-2400 RED		12/12/2018	Unpaid leave autho	Colaciello, Giuseppe	Unpaid leave	Authorize unpaid until January 20	Long terr	Long terr		
Esquerra,	2315-0700 RED		12/11/2018	Unpaid leave autho	Colaciello, Giuseppe	Unpaid leave	Authorize unpaid until January 20	ver	r E	lereaver	
Law Chris	2315-0700 RED		12/11/2018	Unpaid leave autho	Cartin, Laurent	Note		ten	i i	ong terr	
Lenene A	2215-0700 RED-		12/10/2018	Unpaid leave autho	Colaciello, Giuseppe	Unpaid leave	Authorize unpaid until January 20	7.75 12/11)	IO F	ro	
Lepage, A	2515 6166 1125		12/10/2018	Unpaid leave autho	Cartin, Laurent	Note			Pro. Sho		
Moreno, J	1615-2400 HED		12/08/2018	11:45 PM - 7:00 AM	Law, Christopher	4 Instructions	UNLOCK, LOCK, CLEAN [NDerveeu]		The one		
Mouse, M			12/08/2018	11:45 PM - 7:00 AM	Law, Christopher	3 Key Ring No	108-10 [NDarveau]				
			12/08/2018	11:45 PM - 7:00 AM	Law, Christopher	2 Building Pager	555-555-5555 [NDarveau]				

2.1.2. Review and edit Absence

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

Schedules									三 #
					Loade	ed: 4:45PM Previous Schedule Pe	riod 🔽 📆 At	bsenteesm All Reg	► Edit
View C	il i+ - O column Visibi election Filt		₩ •				Refresh V Com	fiew Share	Save Go To
By Em	ployee				12/09 - 12/15				
Name	Phone No	Sun 12/09	Mon 12/10	Tue 12/11	Wed 12/12	Thu 12/13	Fri 12/14	Sat 12	2/15
Almeida,	5143520342	4a 8a 12p 4p 8p 12a	1 4a 8a 12p 4p 8p 12a Prod Wort	4a 8a 12p 4p 8p 12a 4a Prog Worl	8a 12p 4p 8p 12a - Prog Worl	4a 8a 12p 4p 8p 12a 4a Prod Worl	8a 12p 4p 8p	p 12a 4a 8a 12p <mark>Worl</mark>	4p 8p
Biscotti, S	4506382730		Vacation	Vacation	Vacation	Vacation	Vacation		
Cartin, La	5145880863		Unpaid le	Unpaid le	7:30AM - 3	7:30AM - 3	7:30AM - 3		
Colaciello	5143818707		Unpaid le	Unpaid le	Unpaid le	Unpaid le	Unpaid le		
Cyr, Gilles	5145296957		Bereaver	7:00AM -	7:00AM -	7:00AM -	7:00AM -		
Elias, Vict	5147089924		Long term	Long term	Long term	Long tern	Long	term	
Esguerra,	5149472703		Ber	Bereave	m Bere	aven Bereav	em	Bereavem	
Jackman,	5149844174		11:45PM	5PM		Paid in	cid	11:15PM	
Law, Chris	5146272594	11:45PM		Unpaid leave a	uthorized (7 75 12/1	1)		Long tern	
Lepage, A	5142477412		Shot	Shor Transfer	////600146//		shor	Pros 3:00	
Moreno, J	5149941791		ProfShor			Prot Shot	Prot	Shor	
Mouse, M			Unpaid le	Unpaid le	Unpaid le	4:15PM -	7:00AM -		
Recine, E	5147259055		Ligh Wor	Ligh Wor	Ligh	Ligh) Wor	Ligh Wor		
		'					_		

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.

Mouse, Mickey			
Effective Date:*	12/11/2018		
Pay Code:*	Unpaid leave authorized	•	
Amount (HH.hh):*	7.75	•	
Start Time:*	Whole Shift 7:00AM	Partial Shift	
Repeat for:	1 days	Transfer Labor Level:	////600146//

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

🕈 MCG Training 🏻 🗧			
Schedules	□ 桊	Schedule Planner Absence	→
Loaded: 4:45PM Previous Schedule Perior	d 💌 🧰 Absenteesm All Reg 💌 Edit	Loaded: 4:44PM Previous Schedule Period 💌 🧰 Absenteesm All Reg 💌 Edit	×
IIII+ - O - ↓↓↓ - ↓↓ - Column Violbility Sorting More actions Selection Filter Sorting More actions	€ în ⊡- 🔒 🤝-	Colum Visibility Sorting More Selection Filter Sorting More actions €€ €● ►	Schedules Schedule Plenner Absence Reports
	Refresh View Share Save Go To Comments	Refresh View Share Save Go To Comments	
By Employee	12/09 - 12/15	By Employee 12/09 - 12/15	Change My Password
Name Phone No S M	T W T F S	Name Shift S M T W T F S	Help
Almeida, 5143520342	00 00 00 00 00	Almeida, 1615-2400 RED 00 00 00 00 00	Genies
Biscotti, S 4506382730		Biscotti, S 0730-1545 BLU	
Cartin, La 5145880863		Cartin, La 0730-1545 BLU 🕼	Timecards
Colaciello 5143818707		Colaciello 0800-1645 BLU	
Cyr, Gilles 5145296957	7:4 7:4 7:4	Cyr, Gilles 0700-1445 RED	
Elias, Vict 5147089924		Elias, Vict 1615-2400 RED	
Esguerra, 5149472703	Be Be Be Be	Esguerra, 2315-0700 RED Be Be Be Be Be	
Jackman, 5149844174		Jackman, 2315-0700 RED	
Law, Chris 5146272594		Law, Chris 2315-0700 RED	
Lepage, A 5142477412	00 00 00 00	Lepage, A 2315-0700 RED	
Moreno, J 5149941791	🖉 Edit 🚺	Moreno, J 1615-2400 RED	
Mouse, M	X Delete	Mouse, M	
Recine, E 5147259055	* Cut	Recine, E 0700-1445 RED+ UU UU UU UU UU	
	E Copy		
	Add shift		
Indicators	* Add Pay Code	♦ Indicators	
	··· -		

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.



Music, Jojo	-	Shift Details 9	:30am-10:30	am(1.00h)	Primary	Job None		
sert Template 👻	,	Shift Label			Repeat t	his shift for 1	days	
Search			Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Bule Transfer
Name	Description			2.1.a Dute	2 and ton	our runorer	Labor Level Humbrer	tront tale fransfer
RFM-A 14h4 RFM-B 16h1	RED-Fac Mang Ev RED-Fac Mang Ev	ening snit A 14h4 ening shif B 16h1	30am	12/12/2018	1.00		Labor Level Transfer	
RFM-WE1 7h	RED- Fac Mang W	E Day shift1 7h00					-	
RFM-WE2 7h RM-1 7h00-1	RED- Fac Mang W RED- Mailroom Da	E Day shift2 7h00 ay shift1 7h00-14h						
RM-2 9h15-1	RED- Mailroom Da	ay shift2 9h15-16h	-				Search	
(-)								

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.

Name Melemetdjian, Nazo Job Job Labor Account /////W0333333/TBD Work Rule Db Transfer Labor Account Work Rule Add Labor Account Work Rule Add Labor Account Vork Rule Subunits: Sector: Position Class						
Add Labor Account Work Rule Add Labor Account Clear A DeptUnits: Account: Work Order: Wolds 33333 - Event 333333 • 2 Sector: Position Class 		Name Job Labor Account Work Rule	Melemetdjian, ////W0333333	Nazo 3/TBD		
Add Labor Account Clear A DeptUnits: Account: Work Order: Wo333333 - Event 333333 • Sector: Position Class 	ob Transfer	Labor Account	ork Rule			
DeptUnits: Account: Work Order: W0333333 - Event 333333 • Sector: Replacement: TBD - Mickey Mouse • Section Class 	Add Labor A	ccount				Clear A
Subunits: Work Order: W0333333 - Event 333333 • Sector: Replacement: TBD - Mickey Mouse • Sector: TBD - Mickey Mouse • TBD -	DeptUnits:		•	Account:		•
Sector: Replacement: TBD - Mickey Mouse	Subunits:		•	Work Order:	W0333333 - Event 33333	3 🗸)
Position Class	Sector:		-	Replacement:	TBD - Mickey Mouse	·)
	Position Class	s	-			

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.



	Add Shift			4
	Assigned to	Shift Details 7:00am-7:00pm(12:00h)	Primary Job None	
	Start Date Type	Start Time End Time End Date	Duration Job Transfer Labor Lev	l Transfer Work Rule Transfer
	+ x 12/11/2018 Transfer	7:00am 7:00pm 12/11/2018	12.00////W033	3333/TBD
	Comments (0) Add Comment			Cancel
Right-Click on	the shift cell	to view the Event	s (Transfer)	look up information.
.5 Review ar	nd print schedu	ıle		

- 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.

Genie	S		
Overtin	ne Assignment 👻		
Curre	nt Pay Period 🔍 📻 None 💌 Edit		
	Locations (2)		
Ξ	 Hyperfinds (122) 	~	E7 -
Sele	All Home and Scheduled Job Transfers	Share	
	All Home and Scheduled Job Transfers*		
1	All Home and Transferred-in	Employee	Reg Shif
	All Home and Transferred-in*		
	All OT Yes		
	All OT Yes w Work Orders		
	All Temp EE 👔 📊 🔽		
10	New All Temp EE		

Create an Hyperfind

a) From the Show field, select **New** in the dropdown 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.

isibility Personal Query	Name * Description	Last Refreshed: 3:48pr
WYCEFF ROUGHERS Sector Confission Assessment Reserved There Th	Ver 50. Ten Ver 50. Ten MARC OLD 1 Rockie - Landar gergle das veret fils ausdicht 2 Rockie - Landar gergle das veret fils ausdicht das veret fils ausdicht das veret fils ausdicht das verei das veret fils auf das veret fils ausdicht das verei das veret fils ausdicht das veret fils ausdicht das veret fils auf das veret fils ausdicht das verei	Last Refreshed 348
	Selected Conditions Mile Union Internet	
	Cano	al Refrech Save As 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.

Loaded: 4:09PM	Previous Schedule Period 👻 🧰 Position Classification - E 👻 Edit
	► Locations (1)
iii+- ⊙-	 Hyperfinds (122)
Column Visibility	All OT Yes w Work Orders
Selection Filter	All Temp EE
	BLUE CA- AII
	BLUE CA- All OT Yes Go To
	BLUE CA- All OT Yes w Work Orders
By Emplo	yee BLUE CA- Reg EE
Name	BLUE CA- Reg EE OT Yes S
Name	New

Schedule Planner Absence

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.

Select Conditions	Assemble Query View SQL	Test		
Visibility	Public	To meet this condition		
	Public			
Se	Personal		Selected Items*	
Timekeeper Time Management Scheduling User Information Role - Timekeeper	Das Tadeux, Ruben, 20 Dicesare, Torry, 1508 Dicines, Neur, 20070 Dafrac, Yuna Andre, 20 Ebn. Neir, 200750248 Ube Single Wildcard	00201461 0031 827 827 827	Di Cuia Dichame Easy K	
	Selected Conditions Last name is Di Cuia, E	Add Update Delete		

2.2.3. Approve Timesheets

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



Access to Time Card Widget

🕈 McG Sup EV ATT 🔍		~	
Schedule Planner	Schedules	□ ‡	+
Loaded: 1:22PM 12/09/2018 - 12/15/2018 💌 🧰 All Home 💌 Edit	Loaded: 1:32PM Current Schedule Period 🔽 🥅 All Home	- Edit	
Column Selection Image: Source of the selection Image: Source of the selection Selection Filter Source of the selection Image: Selection Filter Image: Selection Image: Selection Selection Selection Image: Selection Selection Selection	Image: Column Column Visubility Sorting More actions Selection Filter Sorting More actions Referse New Share Columnents Share Columnents	Go To	Schedule Planner Schedules Reports
By Employee 12/09 - 12/15	By Employee 12/16 - 12/22		Change My Password
Name Shift S M T W T F S	Name Phone No S M T W T F	S	Timecando
0000009,	0000009,	8:11	Help (a)
0000010,	0000010,		
0000011,	0000011,		Genes

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

Timecards	~					<u> </u>			
Biscotti, Stephane 💽 📢	C 260039533					Loade b m.	Current Schedule Period	🔹 📆 1 Employe	e(s) Selected
Approve Timecard							Print Timecard	Refresh Calculate Totals	Save Go To
Approve Timecard		In	Out	Transfer	Pay Code	Amount	Shift	Daily	Period
Remove Timecard	l Approval	7:30AM			Vacation	7.75		7.75	7.75
·		7:30AM			Vacation	7.75		7.75	15.5
Remove All Timec	ard Approvals	7:30AM		\bigcirc	Vacation	7.75		7.75	23.25
+ 🗙 Thu 12/13		7:30AM		(e)	Vacation	7.75		7.75	31.0
+ 🗙 Fri 12/14	Date	Schedule	In	Out	Vacation	7.75		7.75	38.75
🛨 🗵 Sat 12/15	🗷 Sun 5/20								38.75
	• Mon 5/21								
N	+ X Tue 5/22	6:00AM-6:00PM	7:55AM	5:59PM					
15	• Wed 5/23			0.051 11					
	🛨 🗵 Thu 5/24								
	🛨 🗶 Fri 5/25	6:00AM-6:00PM		6:00PM					
	+ × Sat 5/26	6:00AM-6:00PM	6:03AM	6:01PM	-				
Totals Audits Accruals	Historical Corrections								
All	All								
Location		Job	Acc	ount	Pay Code		Amount	Wa	ges
			-/-//Driver/-/-/-		Vacation		38.7	5	\$921.86

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:
 - \square 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

1

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.



ACCRUAL BALANCES AND PROJECTI

Specific Date

Output Format Adobe Acrobat Document(.pdf) V

Description

Time Period

People

Displays the current blancos, as well as future takings, credits, and project use this to determine if an employee has accrued enough time for a vacation Previously Selected Employee(s)

▼ 12/13/2018

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.

Setup 👻	
Back to Setup	
Search	
SETUP Expand All Collapse All	
Common Setup	Organization Setup
 → HyperFind Queries → Query Manager 	Labor Level Entries Abor Levels

- 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.

Se	arch		Setup > Organiza	ion Setup			
	LABO	OR LEVEL ENTRIES					
	Sav	e Unspecified Labor Level Entry	Refresh				
	Labor	r Level Work Order	▼ Status	Active V			
	Name	or Description *	Search				
	NEW	ENTRY					
	Name	•	Description	TeleTime IP Alias Inactive			
				Add to List			
	ENTR	IY LIST					
		* Name	A	Description	TeleTime IP Alias	Inactive	Read-Only
	X	W0000000		Event Template			
	x	W0000007		DEBATING UNION TEST - VARIOUS BLDGS, SAT. SUN. DEC 8TH			
	×	W0000008		MEDICINE CONFERENCE - MCINTYRE, SAT. SUN. DEC. 8TH 9TH			

- 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**.

Genies ত্রু।	·											
												•
							Current Pay	Period	• N	one	•	
People Timekeeping Appr	v 📰 v									O Refresh	Share	Go To
Add Duplicate Edit	Position En	nployee Reg Shift	Overtime Dollars	Overtime Worked	Overtime Offered	Overtime Pending	Overtime Accepted	Overtime Refused	1st Refus	2nd Refus	3rd Refusal	4th Refus:
	Genies (b))	Genics (2) x	Genies People Timekeeping Approver Add Duplicate Edit Stefale Reg Shift	Genics S X People Timekeeping Approve Add Duplicate Edit Station Employee_ Reg Shift Overtime _ Dollars	Genies Genies Completion of the second s	Genics Cal X Feople Timekeeping Approve Add Duplicate Edit Dollars Worked Offered	Genies Temple People Timekeeping Add Duplicate Edit istion Employee_ Reg Shift Overtime Overtime Overtime Overtime	Genies Current Pay I People Timekeeping Add Duplicate Edit Statution EngloyeeReg Shift Overtime Overtime Overtime Accepted	Genies Image: Current Pay Period Current Pay Period Image: Current Pay	Genies Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Period Image: Contract Pay Peri	Genies Image: Current Pay Period Image: Current Pay Period Current Pay Period Image: Current Pay Period Image: Current Pay Period Prople Timekerping Approve Add Duplicate Schedule Edit Stition Employee_ Reg Shift Overtime Overtime Overtime Edit Overtime	Genies Image: Contract Pay Period Image: Contract Pay

- c. Right-click on the **Person** icon and choose **Add**.
- d. Click on Licenses icon, check Workforce Timekeeper and then Close.

	People Edit	or			10
				Loaded: 1:21PM	
	Person	3 - History	Licenses	C C	
New Duplicate	Person	Job Assi	Suite Product Licenses		
			Workforce Timekeeper Suite Interaction Licenses		
			Workforce Tablet Manager		
			Workforce Tablet Analytics		
			Workforce Mobile Employee	r	

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
- Computer and a fall of the fall	listen al tafanna stan a sting fields.

g. Complete the following Additional Information section fields:

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



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

Job Assignment tab

h. Select the the Job Assignment tab

Person Job Assignment		
 Primary Account 		
	Primary Labor Account *	Effective Date *
+ ×		
Show Primary Job Name:	Current Name When Job was assigned	
Seniority Date		

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

L	abor Account -/-/-/	-/600023/W0000009/-		
Labor Account				
Add Labor Acco	punt			Clear A
DeptUnits:		X Account:	600023 - Overtime	•
Subunits:	•••	Vork Order:	W0000009 - REGULAR B	•
Sector:		X Replacement:		•
Position Class	•••	▼ X		
	Smart search			

OBJECT	DEFINITION/FUNCTION
Dep Units, Subunits, Sector,	Select the Dash – from the drop-down list.
Position Class, Replacement	
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).

I. 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 Fictitius Employee/Event created in step 1.



d. Select the employee then click on Go To

Genies				÷ ا
QuickFind V				Loaded 2:42PM Week to Date
Select All Column Filter People Timekeeping	Approval Schedule			Share
Nam	ne 🔹	ID		L 1 Selected
0000009, REG. SATURDAY STRATHCONA MUSIC		W0000009	_BLAI	Week to Date
0000010, STRATHCONA MUSIC PUBLIC EVENTS		W0000010	_BLAI	h Os to midnet
0000011 DEDDATULIALI DUDUO EVENTO		1//0000033		• Go to widget
				▼ Go to workspace
			- 1	McGill Payroll

∈.

- 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.

Schedules														10.4
								Loaded: 3:13PM	Current Schedule Period	• =	1 Employ	/ee(s) Select	ed 💌	
View Column Selection	Visibility Filter	ect all Gantt Vie	↓↓↓ - w Sorting							C Refresh	View Comments	Share	Save	Go To
	By Employ	yee						1/06 - 1/12						
Name	Phone No	Employee	Scheduled Hours	Sun 1/06	Mon	1/07	Tue 1/08	Wed 1/09	Thu 1/10		Fri 1/1	1	Si	at 1/12
0000010, STRATHC			0.00		÷.	Add shift								
					*🏛	Add Pay C	Code							
					_0	Insert shif	ft template							
					EA.	Enter Tim	e Off							
					•	Restore								
					6	Paste								
					©	Edit Accru	al Amounts							

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

00000	to 110, STRATHCONA	A 💌	Shift Details	12:00am-1:00	am(97.00h)	Primary	Job None		
isert Ter	nplate 👻		Shift Label			Repeat t	his shift for 5	days	
	Start Date	Туре	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfe
+ ×	1/07/2019	Regular	12:00am	1:00am	1/11/2019	97.00			
ommer Selec	1/07/2019 ts (0) :t Comment	Regular	12:00am	1:00am	1/11/2019	97.00			
ommer Selection	1/07/2019 ts (0) :t Comment arch	Regular	12:00am	1:00am	1/11/2019	97.00			
+ × ommer Selec 3 Ke 4 Ins	ts (0) tc Comment arch y Ring No turctions	Regular	12:00am	1:00am	1/11/2019	97.00			

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	Click on Add Comment.
Room	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.

Schedules						≖ ‡
					Loaded: 3:13PM Current Schedule Period 💌 🧰 1 Employee(s) Selected 💌 Edit	
					Locations (1)	
4=-	iii+-	••	= *	88	↓↑↓ - Typerfinds (125)	W
View	Column	Visibility	Select all	Tabular View	Sorting All Home and Transferred-in	
	Selection	Filter			All Home and Transferred-in*	
	By	Emplo	yee		● 1/06 - 1/12 All OT Yes	
				Scheduled	Sun 1/06 Mon 1/07 Tue 1/08 Wed 1/09 All OT Yes w Work Orders	
Name	Phone	NO EM	pioyee	Hours	4a 8a 12p 4p 8p 12a 4a 8a X All Temp EE	
0000010,				0.00	BLUE CA- AII AII O' TES W WORK O'DERS	1
· · ·					BLUE CA- All OT Yes	
					New	

c. Click on the Gantt View icon.

Schedules																	E #
										Loaded: 4:04F	M Previous Sched	ule Period	•	RED CA -	All EE OT Y	es w 💌	Edit
View Column Selection	Visibility Filter	Select all Gantt	t View Sorting										O Refresh	View Comments	Share	Save	Go To
	By Emplo	oyee								12/30 - 1/05							
Name	Phone No	Employee	Scheduled Hours	Sun 12/30	Mo	on 12/3	1	Tue 1	/01	Wed 1/02	Thu	1/03		Fri 1/04		Sat	/05
0000009, REG. SA			0.00		12:00AM	Ø	Edit										-
0000010, STRAT			0.00			*🏛	Add Pa	y Code									
0000011, REDPAT			0.00			83	Enter 1	ïme Off									
0000012, IMDB E			0.00			×	Delete										_
0000014, SCHULI			0.00			2	LOCK										
0000015, GERLBE			0.00		l [~~	Cut	lm									
0000021, MOYSE			0.00			₽	Сору	0									
0000022, EXAMS			0.00			6	Paste										
Abanto Florida, N	5143222103	0.00	38.75		4:15PM -	©9	Edit Ac	crual Amounts	AM	4:15PM - 12:00AM	4:15PM - 12:0	MA00	4:15PN	1-12:00AM			
Acevedo, Ernesto	5146489703	0.00	38.75		7:00AM -	<u></u>	Add sh	ift	м	7:00AM - 2:45PM	7:00AM - 2:4	5PM	7:00AN	1 - 2:45PM			
Aguilera, Aristides	7455862	0.00	38.75		4:15PM - 1	2:00AM		4:15PM - 12:00	AM	4:15PM - 12:00AM	4:15PM - 12:0	MAOC	4:15PN	1-12:00AM			
Almeida, Brian	5143520342	0.00	38.75		4:15PM - 1	2:00AM		4:15PM - 12:00	AM	4:15PM - 12:00AM	4:15PM - 12:0	MA00	4:15PN	1-12:00AM			
Antenucci, Ferna	4813936	0.00	38.75		7:00AM - 2	2:45PM		7:00AM - 2:45F	M	7:00AM - 2:45PM	7:00AM - 2:4	5PM	7:00AN	1 - 2:45PM			

÷

Cut

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 🦉 Edit
- 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 determined.
- 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 Provide Copy
- e. Locate and right click on the original event shift then click on Paste to bring back the shift event for a further assignment.
- f. Right-click on the pasted shift then click on set and remove the Work Rule Transfer.
- g. Click on Apply and Save

1

Add a Notice in the Employee Profile

- a. Select the employee then click on Goto
- 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.





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.

🕈 McGill Pa	Ar McGill Payrol People Editor		Genies		22 X				
Genies									
Overtime Assig	inment 🕶								Loaded 5:06PM Current Pay Period 🔹 🧰 BLUE CA- Reg EE OT Yes 💌 Edit
				سب ا م					Hyperfinds (125)
Select All	Column Filter	People	Timekeeping Ar	voroval Sche	• •				GREEN CA- Temp EE OT Yes w Work Orders
Rows	Selection	1 copie	intercepting 14	protein 0000					Inactive/Terminated FF
Name	Cell Phone	Home Phone	Sector	Position	Employee	Reg Shift	Overtime Dollars	Overtime Worked	Overtime Pending greater than 0
Komaroff,		43840507	CAMPUS	Groundsp	0.00	0730-1545 BLUE-Gro	0.00	0.0	Overtime Refused greater than 0
Colaciello		51438187	CAMPUS	Events At	0.00	0800-1645 BLUE-Eve	0.00	0.0	Personal Overtime Pending greater
Lefebvre,		8431840	CAMPUS	Groundsp	0.00	0730-1545 BLUE-Gro	16.00	0.0	Position Classification - ADMIN COORD
Groulx, St		51491902	CAMPUS	Groundsp	0.00	0730-1545 BLUE-Gro	332.10	57.5	Position Classification - ASSIST MGR BLDG SER
Whitfield,		45069272	CAMPUS	Driver	0.00	0730-1545 BLUE-Eve	170.08	211.0	New
Cartin, La		51458808	CAMPUS	Driver	0.00	0730-1545 BLUE-Eve	0.00	0.0	

c. Review the Overtime Assignments.

Genies															
Overtime Ass	rtlme Assignment 👻 Loaded 5:14PM Current Pay Period 💌 🎛 Overtime Refused greater 👻 Edit														
Select All Rows	Image: The state of the st														
Name	Cell Phone	Home Phone	Sector	Position	Employee *	Reg Shift	Overtime Dollars	Overtime Worked	Overtime Offered	Overtime Pending	Overtime Accepted	Overtime Refused	1st Refus	2nd Refus	3rd Refusal
Culham, K		51481589	PRINTING	General Pr	0.00	0830-1630 GREEN- P	0.00	0.0	4.0			4.0	2019-01-06		



5.2. Quick Links (Interfaces)

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

A McGill Payroll	Quick Links	<i>位</i> X.
Quick Links 👻		
Interfaces		
Results		
Group Edit Results		

Interfaces

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

Back to (Quick Links						
INTERFACE	ES						
Refresh	Run Set Runtime Options Schedule						
Calcul	Calculate Employee Ratio	Description Ratio and undates the corresponding value effective-dated at the beginning of the current pay period					
Casua	Casual Pavroll Report	I 'Casual Payroll Report From [StartDate] to [EndDate].csv' where StartDate and EndDate are user-input values in 'mm/dd/yyyy' format.					
Emplo Repor	Employees Scheduled To Work	a "ListOrEmployeesScheduledToWork From [StartDate] to [EndDate] csv' where StartDate and EndDate are user-input values in 'mmidd/yyyy' format.					
Import Reset	Report for Security	s from a .csv file located in the 'Input' or 'WIM_IN' mapped folder. Users are prompted for filename (incl. extension: .csv, .bt). s-No' value from a .csv file located in the 'Input' or 'WIM_IN' mapped folder. Users are prompted for filename (incl. extension: .csv, .bt). Column order must be: Employee ID,					
Summ	Import Accrual Balances	a expects the source file to have a header row. I 'Summarized Payroll Report From [StartDate] to [EndDate] csv' where StartDate and EndDate are user-input values in 'mm/dd/yyyy' format.					
Updati	Reset OT Custom Field	ces 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					
	Summarized Payroll Report						
	Update Replacements						
INTER	ACE	DEFINITION/FUNCTION					
Calanda	ta Faralana Datia	This interface calculates the Employee Ratio and updates the corresponding					
Calcula	te Employee Ratio	value, effective-dated at the beginning of the current pay period.					
		This interface extracts a cou file named 'Casual Payroll Penert From					
Cocuol	Dovrall Papart	[StartDate] to [EndDate] ccv/ where StartDate and EndDate are user input					
Casual	rayion Report	values in 'mm/dd/www/ format					
		values in min/uu/yyyy format.					
Franka		This interface extracts a .csv file named 'ListOfEmployeesScheduledToWork					
Employ	ees Scheduled To Work	From [StartDate] to [EndDate].csv' where StartDate and EndDate are user-					
- Repor	t for Security	input values in 'mm/dd/yyyy' format.					
		This interface imports Accruals Balances from a .csv file located in the					
Import	Accrual Balances	'Input' or 'WIM_IN' mapped folder. Users are prompted for filename (incl.					
		extension: .csv, .txt).					
		This interface extracts a csy file named 'Summarized Payroll Report From					
Summa	vrized Payroll Penart	[StartDate] to [EndDate] ccv/ where StartDate and EndDate are user-input					
Junna	inzed Payron Report	[StartDate] to [EndDate].csv where StartDate and EndDate are user-input					
		values in min/uu/yyyy format.					
		This interface updates the list of resources to be replaced, consequently the					
Update	Replacements	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.



RESULTS											
Refresh											
Start Date 1/04/2019 Start Time	Start Date 1/04/2019 📾 Start Time 12:19PM End Date 1/07/2019 📾 End Time 11:59PM Apply										
Date and Time 5	User Name	Interface	Locale Policy	Status							
1/07/2019 12:18PM	McGTraining	Calculate Employee Ratio	<none></none>	Running							

Group Edit Results (Signed Off detail + Overtime refusal)

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

GROUP EDIT RESULTS Last Refreshed: 12/11/2018 1:33PM										
Refresh										
Group Edit	Date	Time	User Name	Status	Results					
This table currently contains no data.										

