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Introduction

Welcome to Kronos 8.0, the official electronic timekeeping system for UC Santa Barbara, which uses networked time clocks and computer terminals. The best part about Kronos 8.0 is that it is JAVA free!

The Kronos system offers basic scheduling, time reporting, exceptions reporting, and absence tracking online. This training guide is to help departmental managers and supervisors accomplish timekeeping tasks.

UCSB tracks hours worked and leave taken via the campus’s electronic timekeeping system for employees required to keep a timecard. For questions regarding pay policies, please reference the appropriate personnel policy or collective bargaining agreement online.

If you have questions or need assistance with Kronos, please contact your departmental timekeeper or payroll manager.

Log On Information and Navigation

Important Information:

- Kronos 8.0 is JAVA free, which means you can use any type of computer (MAC or Windows PC), and any up-to-date browser (Internet Explorer, Google Chrome, Mozilla FireFox) to log on. For best performance, we recommend using Google Chrome.

- Kronos 8.0 now uses the Campus Authentication Service (CAS), an enterprise Single Sign-On solution for web services. Single Sign-On is a session/user authentication process that allows a user to provide his or her credentials (UCSBNetID and password) once in order to access all applications to which they authorized. If you already logged into a UCSB SSO application, SSO allows you direct access to the application without authenticating again.

- UCSB’s Electronic Timekeeping Portal: https://timekeeping.ucsb.edu/
Log On Instructions:

**Step 1.** Click on link provided above under “Timekeeping Log on.”

**Step 2.** If you have not already logged into a UCSB SSO application, the UC Santa Barbara authentication screen will require you to enter your UCSBnetID and password.

**Step 3.** After logging into a UCSB SSO application, you will have direct access into Kronos without being required to enter your UCSBnetID and password. This log on feature is called “single sign on” or SSO. It will open Kronos automatically to your default home screen.

Definition of a Kronos Manager:

Anyone who can access another’s timecard. Responsible for addressing timecard exceptions, making corrections if needed, and approving the timecards they manage.

Managers and supervisors are responsible for reviewing timecards to ensure:

- All hours worked and leave taken are properly recorded.
- No missed punches.
- Holiday hours are correct if pay period includes holidays.
- Employee approvals have been applied.

Managers should familiarize themselves with the different types of employees and time entry methods in order to assist their employees with timecard questions.
Key Areas of your Default Homepage:

- The middle of the screen is your primary “workspace”.
- The upper left corner identifies the employee signed on next to the UCSB logo.
- The top center section of the screen alerts you to missed punch timecard exceptions or time off requests (TORs). Clicking on these alert notifications takes you directly to the events needing attention.
- The upper right corner is your “carousel” which allows you to change your workspace from “Manage My Department” to “My Information” to access your personal timecard.
- Along the right hand side of the screen are your “Related Items” which allows you to navigate to other related areas in Kronos.

Navigation Icons:

- **Select All Rows** allows you to select all employees shown in a Genie with one click. This is helpful if you want to perform an action on an entire group, navigate to timecards or people editor for review, or run a report for the group.
- **Column Selections** allows you to remove columns displayed on a Genie temporarily. This is useful if exporting information to Excel to eliminate unwanted data.
- **Filter** allows you to specify criteria to return a subset of data displayed in a Genie. Columns that allow filtering will have an input box displayed where you can enter criteria.
• **Timekeeping** allows you to add or delete pay codes for employee(s) selected. We recommended that you perform pay code edits directly on the timecard rather than using this feature.

• **Approval** allows access to approve options.

• **Refresh** updates the data displayed on the page.

• **Share** allows you to print or export data.

• **Go To** allows access to additional information for the employees selected such as:
  - Timecards
  - People Editor
  - Schedules
  - Audits
  - Reports
  - Review Missed Punches
  - Manage Time Off Requests

**Additional Navigation Options:**

- Maximize and minimize Genies using the box icon in the upper right corner to view more data.

- The gear icon allows you to “pop-out” the workspace to view lists that contain more data than can be viewed without expanding. If a gear icon is greyed out, the option to “pop-out” is not available for the existing configuration. Employee workspace utilizes this feature.

**Log Off Instructions:**

When you are ready to log off Kronos, simply click on “Sign Out” below your name in the upper left hand corner of the screen.

If you access Kronos from a shared computer, make sure to exit the application and the browser to clear your credentials so that other users can access the application due to Single Sign-On (SSO). If you click “Close”, the window will close but the browser session is still active. Instructions for properly exiting your browser or located on the timekeeping portal website: [https://timekeeping.ucsb.edu/content/kronos-v8ssoplogout-instructions](https://timekeeping.ucsb.edu/content/kronos-v8ssoplogout-instructions)
Genie Basics

Purpose of a Genie:
A Genie is your starting point for viewing information in Kronos. Genies display employee information in a summarized, easy to read format. The “Pay Period Close Detail” is your default Genie upon log on. Additional Genies appear as selections on the right side of the screen in your Related Items.

By using a Genie, you can perform the following functions:

- Locate employees and access their timecards.
- Select specific employees and generate reports.
- Review summarized information “at-a-glance” for analysis of data.
- Perform group edits.

When you use a Genie, you can filter the data that appears so that it answers the following questions:

- Who – Which employee or group of employees.
- When – Which time period or pay period.

How to use “QuickFind” Genie:

**Step 1.** From the list of Genies in the Related Items area, click on “QuickFind” to open

![QuickFind Genie](image)

**Step 2.** Use the search box on the left to find your employees (“who”).

- To find all the employees you have access to type: *
• To find last name of the employee with the last name type: last name*
• To find first name of the employee with the first name type: *, (space) first name*
• To find first name of the employee with only the first initial type: *, (space) first initial*

**Step 3.** Use the box on the right side of the workspace to find the time period (“when”). You can choose a predefined period from the drop down list or use the calendar icon to select a specific date or date range.

**Step 4.** Once the “who” and “when” have been selected, click on the search button (magnifying glass) to obtain search results.

**How to use the other Genies (not QuickFind):**

**Step 1.** Choose a Genie from the list of Genies widgets in the Related Items area.

**Step 2.** Specify the time period (“when”) from the predefined list or by using the calendar icon to select a specific date or date range.

**Step 3.** In the search box to the right of the time period, select your employees (“who”) using a hyperfind query.

**Step 4.** After selecting the time period and hyperfind query, the workspace will populate with your employees matching the criteria specified.

* **The following widgets are available in Related Items.**
People Basics

People Editor:

People Editor provides view-only access to employee configuration in Kronos. This includes general employee data as well as configuration governing functionality such as access, pay and accrual rules, and labor information. Much of this information automatically configures for new electronic timekeeping users. Department Timekeepers and Payroll Managers are responsible for manual configuration updates and changes. People Editor is accessed from any Genie through the Go To icon.

![People Editor Image]

Labor Levels:

Kronos uses up to seven labor levels to categorize hours worked and leave taken. At UCSB, these labor levels defined as follows:

1. Account: 6-digit account value from employee’s PPS distribution.
2. Fund: 5-digit fund value from employee’s PPS distribution.
3. Project Code: Optional department defined value from employee’s PPS distribution.
4. Cost Center: Optional department defined value from employee’s PPS distribution.
5. Access Control Number (ACN): Kronos value representing the supervisory position the employee reports to.
7. DistNum: 2-digit value from employee’s PPS distribution.

A labor account is a combination of these seven labor levels. If an employee has more than one active PPS distribution, they will have a Primary Labor Account designated. The department associated with the Primary Labor Account is the Kronos Home department.

Sharing Employees

Sharing employees refers to employing individuals who also work in other departments. Their employee configuration in PPS determines how to manage them in Kronos.
For exempt and career non-exempt employees, timecard hours are automatically allocated to the different departments PPS percentages and funding sources.

Students and limited employees are required to designate all reported work periods to an available job selection associated with each department.

The following hyperfind queries aid in locating shared employees that are not in your “home” view.

- **All Home and Eligible Transfer** is the default employee list displayed for a manager when logging on. This display includes your home employees as well as those eligible to work for your department.

- **All Home and Transferred-in** displays your home employees as well as those that have reported hours worked or leave taken for your department on their timecard.

**Timecard Basics**

Employees record hours worked and leave taken on their electronic timecard. The Pay Rule assigned to the employee determines the date range for the pay period displayed and overtime calculations if applicable. Timecards are accessed from any Genie through the Go To icon.

![Timecard View Image]

**Timecard View:**

The timecard view offers the ability to:

- Review pay code totals resulting from recorded time worked and leave taken.
- Resolve exceptions such as a missed punch.
- Verify transferred hours.
- Perform corrections to timecard data if needed.
- Enter comments to document corrections.
- View accrual balances.
- Approve the timecard.
**Indicators and Exceptions:**

The appearance of the timecard cells changes to indicate different conditions or exceptions. You can hover over the indicator to view more information.

- Transaction shown in **purple** indicates it was system-generated through the scheduler.
- Blue speech bubble icon after a punch or amount indicates a comment.
- Date cell with a vertical red bar indicates an unexcused absence. This is exception is ignored if the department is not using schedules.
- Date cell with a vertical blue bar indicates an excused absence.
- Solid red cell indicates a missed punch.
- Punch with a vertical red bar indicates an unscheduled early, or late exception.
- Punch with a vertical green bar indicates a manager has reviewed the exception.
- Yellow timecard indicates an employee or manager has approved.
- Green timecard indicates an employee and a manager have approved.
- Greyed out timecard means the time card has been signed off and is not editable.

Timecard exceptions (or alerts) intended to identify discrepancies that may require action. Some exceptions, like a missed punch will require fixing before the timecard can be signed off.

**Review Punch Exceptions:**

Kronos will track exceptions, such as late or early punches, as compared to a schedule. Departments have the option to review or acknowledge these exceptions if desired.

On the employee’s timecard:

- **Step 1.** Right-click in the cell containing an exception.
- **Step 2.** Click Mark As Reviewed. Exception indicator will turn green.
- **Step 3.** Click Save to complete the edit.

**Accessing More Information:**

Clicking the more content icon at the bottom of the timecard displays additional information on two tabs:
• **Totals** – Summary of hours categorized by account and pay code amounts.
• **Accruals** – Available balances by accrual code.

**Timecard Actions:**

You can use the **Go To** icon in the right corner to access additional information for the employee such as:

• People Editor
• Schedules
• Audits
• Reports
• Review Missed Punches
• Manage Time Off Requests

**Timekeeping Basics**

**Timecards viewed from a Genie:**

The two most common Genie widgets are:

• **Pay Period Close Detail**: Summarizes departmental timecards for Previous Pay Period activity.
• **Reconcile Timecard**: Summarizes departmental timecards for Current Pay Period.

*** Timecard Editing Tips ***

Kronos tracks all changes to timecards via audits available for viewing from the Go To icon. Any changes are permanent once saved. You can tell there is unsaved data when the **Save** icon in the upper right corner is orange. To check how changes might affect totals **before** saving, click on the **Calculate Totals** icon in the upper right corner. This gives you an opportunity to revert changes if desired using the **Refresh** icon, also located in the upper right corner. Document any changes appropriately according to your departmental practice.

Examples of edits made in an employee’s timecard:

• Add a comment (with or without notes).
• Add a pay code (hours worked, leave taken, ERIT, etc.).
• Correct a missed punch.
• Edit an existing punch.
• Delete an existing punch.
**Timecard Comments:**

You have the option to add comments to pay code amounts or punches. Kronos allows you to select from a predefined comment list and add an optional free form note if needed. Please use discretion when entering a note as this information is visible on reports.

On the employee’s timecard:

1. **Step 1.** Right-click in the cell where you want to add the comment.

2. **Step 2.** Click the Comments icon.

3. **Step 3.** Using drop down menu, select comment from predefined list.

4. **Step 4.** If needed, type an optional note.

5. **Step 5.** Click Add.

6. **Step 6.** Review for accuracy, updating to correct spelling add additional notes if desired.

7. **Step 7.** When done, click OK to close the comment window.

8. **Step 8.** Click Save to complete the timecard edit.

9. **Step 9.** You can hover over the resulting blue speech bubble to see the comment information.

**Add New Row:**

You can add a row to a date on the timecard if needing more than one pay code, or if a pay code needs to be added to the date in which punches exist.

On the employee’s timecard:

1. **Step 1.** Click on the “+” icon left of the date to add a new row.

2. **Step 2.** Repeat as necessary for all edits needed for the date.

**Add Pay Code:**

UCSB uses various pay codes to record time worked and leave taken. You cannot enter a pay code on a line that contains punches; add new row.

On the employee’s timecard:

1. **Step 1.** Click in the “Pay Code” cell next to the desire date.
Step 2. Choose the appropriate pay code from the drop down list.
   a. To access pay codes lower in the list, type the first letter of the pay code to move down the list quickly.
   b. “Hours Worked” is a system pay code at the bottom of the list. Type “hou” to access this pay code quickly.

Step 3. Tab out of the cell.

Step 4. Enter the quantity of hours in the “Amount” cell.
   a. For non-exempt employees, amounts are quarter-hour increments.
   b. For exempt employees, amounts are full-day increments.

Step 5. Click Save to complete the edit.

**Edit Pay Code:**

You can select a different pay code or amount if a correction to the timecard as needed.

On the employee’s timecard:

   **Step 1.** Right-Click in either the “Pay Code” or the “Amount” cell to access Pay Code Actions.

   **Step 2.** Click Edit.

   **Step 3.** Update the pay code or amount as needed and click OK.

   **Step 4.** Click Save to complete the edit.

***Punch Tips***

When entering a punch, Kronos automatically assumes A.M. hours.

- If you key “730” and hit tab or save, it will display 7:30 AM.
- If you key “730p” and hit tab or save, it will display 7:30 PM. You must use the “p” for PM.
- Kronos recognizes military time as well “0730” for 7:30 AM. "1930" for 7:30 PM.

**Add Punch / Correct a Missed Punch:**

Verify with the employee what time is correct to record.

On the employee’s timecard:

   **Step 1.** Click in the cell you want to add the punch.

   **Step 2.** Type the time of the punch.
Step 3. Tab out of the cell.

Step 4. A comment justifying the edit can be added by right-clicking on the punch.

Step 5. If desired, click Calculate Totals to preview the resulting calculations.

Step 6. Click Save to complete the edit.

**Edit Existing Punch:**

Existing punches may need editing for various reasons, including overriding the designation of a punch, cancelling automatic meal deductions, marking punch exceptions as reviewed, and adding comments. Do not edit punches to prevent overtime as the timesheet is a legal document.

On the employee’s timecard:

Step 1. Right-click on the punch you want to edit.

Step 2. Click on edit icon to do any of the following:
   a. Change the time of the punch.
   b. Override the type of punch (in, out, new shift).
   c. Cancel meal deduction in specific instances if separate shifts applied deduction inappropriately.

Step 3. If desired, mark a punch exception as reviewed or add a comment.

Step 4. Click Save to complete the edit.

**Delete Inappropriate Punch:**

Deleting a punch from a timecard is **strongly discouraged** as punches reflect actual times an employee worked. However, there are some exceptions. An employee might accidentally punch when logging on to approve the timecard. An employee might accidentally clock out twice at the end of a shift making it appear as if there is a missing punch when in fact there is a duplicate punch.

On the employee’s timecard:

Step 1. Right-click on the punch you want to delete.

Step 2. Add a comment justifying the deletion.

Step 3. Click Save.

Step 4. Click in the cell with the punch you want to delete, then backspace to delete.

Step 5. Tab out of the cell.

Step 6. Click Save to complete the edit.
Managing Time Off Requests

Time Off Request (TOR) functionality is optional. If used by the department, managers are responsible for reviewing and making decisions regarding employee time off requests. Whenever a Manager has Time Off Requests (TORs) requiring action, the Alerts bar at the top of the workspace indicates this with the icon at right. Employees can submit a new TOR (status = Submitted). Approved time will appear on the employee’s schedule. Employees can also cancel an approved TOR (status = Cancel Submitted). Submitted cancellations must be approved to remove the pay code from the employee’s schedule.

**Step 1.** Click on the alert icon to manage TORs requiring action.

![Alert Icon]

**Step 2.** Click on the Time Off Request indicated by the exclamation mark icon to access the Manage Time Off Requests widget.

![Manage Time Off Requests Widget]

**Step 3.** Use the Management Action Buttons to display the time off request and take action on the submitted TOR.

- **Details:** Show the request details.
  - Start and End dates indicate the date range for the request. The date range should not include holidays or weekends. If time needs to span holidays or weekends, multiple periods can be specified within the TOR.
  - Pay Code specify what type of time off is requested.
  - Duration should specify hours.
- Start time is the time of day when the time off begins.
- Length is the number of hours to deduct for each day in the request.

- **Edit**: Do not use. Requests should be edited when using the approve action.
- **Approve**: Edit the request if needed, and approve. Comments can be added if desired.
- **Refuse**: Refuse a request.
- **Pending**: Set the request to the Pending state indicating you want to review later.
- **Retract**: Retract a request.
- **Request Time Off**: Create a new time off request if the employee was unable to do so.

## Schedule Basics

The Schedule Editor allows you to create and maintain employee work schedules and add non-worked hours into the schedule. Schedules are optional in Kronos but are necessary if a manager needs to restrict an employee to a defined set of workable hours/shifts. Schedules are accessed from the Go To menu. Schedule information can be entered up to 295 days in the future. Information from the Schedule will flow onto the timecard approximately 30 days in advance.

### Schedule Icons:

- **View** allows you to view schedules by employees.
- **Column Selection** allows you to hide the scheduled hours (Sch Hrs.) column.
- **Visibility Filter** allows you to change restrict the information displayed.
- **Select all** allows you to select all employees.
- **Gantt View / Tabular View** allows you to toggle between Gantt and Tabular views of employee schedules.
- **Sorting** allows you to sort by name or scheduled hours.

- **Refresh** updates the data displayed on the page.
- **View Comments** shows comments and notes.
- **Share** allows you to print or export data.
- **Save** allows you to save changes. If the icon is gray, there are no changes to save.
- **Go To** allows access to additional information for the employees selected such as:
  - Timecards
  - People Editor
• Audits
• Reports
• Review Missed Punches
• Manage Time Off Requests

**Add or Update a Shift:**

On the employee’s schedule:

**Step 1.** Select an appropriate schedule period or range of dates in the upper right corner.

**Step 2.** In the cell below the appropriate date, type the start and end times of the shift. If more than one shift is desired on a day, hit return to enter additional shifts.

**Step 3.** Click **Save** to complete the edit.

***Entering Shift Time Tips***

When entering time, Kronos automatically assumes A.M. hours.

- If you key “730” and hit tab or save, it will display 7:30 AM.
- If you key “730p” and hit tab or save, it will display 7:30 PM. You must use the “p” for PM.
- Kronos recognizes military time as well “0730” for 7:30 AM. “1930” for 7:30 PM.

**Create a Shift Pattern:**

Shift patterns are used for those employees that have the same schedule every week. On the employee’s schedule:

**Step 1.** Select an appropriate schedule period or range of dates in the upper right corner.

**Step 2.** Right-click on the employee’s name and click the Schedule Pattern icon to open the Schedule Pattern window. If the Schedule Pattern window does not have options available, make sure the date range selected is active (Current Schedule Period) or in the future.

**Step 3.** Complete details of the schedule pattern as follows.
a. Confirm or update the anchor date.
b. Confirm or update the start date. For a new pattern, the start date is typically the same as anchor date.
c. Specify an end date if the schedule is not permanent. Schedule patterns default with Forever for the end date indicating a permanent pattern.
d. Patterns are typically defined for a week at a time. This period can be changed if desired.
e. Check the **Override Other Patterns** option if this is a new pattern replacing a current pattern. Leave this option unchecked if there is no existing pattern or if this new pattern should be used in addition to a current schedule.
f. In the cell below the appropriate day, type the start and end times of the shift. If more than one shift is desired on a day, hit return to enter additional shifts. Repeat for each scheduled day.
g. Click **Apply**. Confirm the schedule pattern information and click **OK**.

**Step 4.** Click **Save** to complete the edit.

**Edit a Shift Pattern:**

On the employee’s schedule:

**Step 1.** Select an appropriate schedule period or range of dates in the upper right corner. Make sure the date range selected is active (Current Schedule Period) or in the future.

**Step 2.** Right-click on the employee’s name and click the Schedule Pattern icon to display the employee’s Schedule Pattern.
Step 3. Click the edit icon to open the Schedule Pattern window.
Step 4. Edit the schedule pattern.
Step 5. Click Apply. Confirm the schedule pattern information and click OK.
Step 6. Click Save to complete the edit.

Delete a Shift Pattern:

On the employee’s schedule:

Step 1. Select an appropriate schedule period or range of dates in the upper right corner. Make sure the date range selected is active (Current Schedule Period) or in the future.

Step 2. Right-click on the employee’s name and click the Schedule Pattern icon to display the employee’s Schedule Pattern.

Step 3. Click the delete icon and respond Yes when asked to confirm.

Step 4. Respond Yes when asked to confirm the schedule pattern deletion and click OK.

Step 5. Click Save to complete the edit.
System Notifications

There are three types of system notifications employees and managers receive.

1. Approvals:
   a. Employees receive a notification to approve their personal timecard. Students do not receive these notifications if there are no hours on their timecard.
   b. Managers receive notifications if employee and/or manager approvals are missing.

2. Nearing Vacation Maximums: Employees will receive notification when nearing their maximum vacation accruals at specified times.

3. Time Off Requests: Employees and Managers will receive notification when a Time Off Request (TOR) is submitted as well as when action has been taken on a request.

Pay Period Processing

Electronic timecard data (hours worked and leave taken) is regularly uploaded from Kronos to PPS for processing. Prior to the upload, you need to address all timecard exceptions and ensure employee and manager approvals are done. Please work closely with your departmental timekeeper or payroll manager to ensure deadlines are met.

Biweekly Payroll:

The biweekly pay period ends on a Saturday. The upload process runs at 10:00 am the following Wednesday. The upload schedule is subject to change during holiday periods.

The following chart shows the recommended timeframes for approvals after each pay period:

<table>
<thead>
<tr>
<th></th>
<th>Monday, end of day</th>
<th>Tuesday morning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Approval</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Manager Approval</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Monthly Payroll:

The pay period for monthly exempt employees ends on the last day of each month. The pay period for monthly positive pay (hourly) employees ends on the 15th of each month. The upload process runs at 10:00 am on a predetermined date between the 16th and 23rd of each month based on the UC pay compute schedule.
The following chart shows the recommended timeframes for approvals after each pay period:

<table>
<thead>
<tr>
<th></th>
<th>3 days after Pay Period End</th>
<th>5 days after Pay Period End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Approval</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Manager Approval</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**Pay Period Close Review:**

After the pay period ends, review the status of your employee’s timecards in the Genie Pay Period Close Detail, your default workspace. The time period defaults to Previous Pay Period automatically. You can sort the pay schedule (Pay Schd) column to group the biweekly and monthly employees together. You can also choose a different hyperfind query based on the upload (biweekly or monthly) processed. Columns can be sorted and grouped to organize the data for review.

- Employees who have not yet approved timecards may need a friendly reminder.
- If you have employees that punch in and out, missed punch exceptions (identified with a checkmark) need to be resolved. The Payroll Manager cannot sign off a timecard if missed punches exist.
- Additional columns break down the recorded time and calculated overtime for review.
- Timecards can be opened if a detailed review is needed from the Go To To menu.

***Tip***

- Managers should view both “All Home and Eligible” and “All Home and Transferred” to see all the applicable employees. You may miss an employee if this step is not taken.

**Approve Reviewed Timecards from Pay Period Close:**

Manager approval must be applied before the upload deadline.

**Step 1.** Select the employees you wish to approve.

**Step 2.** Click the Approval icon and click Approve Timecard.

**Step 3.** Click the Refresh icon to see the approval indicator applied in the Genie. The indicator is numeric as one or more managers could potentially approve a timecard.

**Reports**

Reports can help you extract information to manage your department’s timecard data. The following reports are commonly used:

- **Employee Hours by Labor Account (Excel):** Displays a summary of employee hours and amounts for each labor account/pay code in the time period specified.
• Accrual Detail Report: Displays running accrual balances and transactions for each employee in the time period specified.

How to run a report
Access reports in one of two ways.

If you want to run a report for a predefined **hyperfind query** (such as All BW):

**Step 1.** Click on the Reports widget in Related Items on the right side of your workspace.

**Step 2.** In the Reports tab, browse through your available reports to locate the report you wish to run. Expand the “All” category by clicking on the “+” to display all reports you can access.

**Step 3.** Click on the report name to open the report options on the right side of the workspace.

**Step 4.** Choose a predefined hyperfind query (“who”).

**Step 5.** Choose a time period (“when”).

**Step 6.** Choose the appropriate output format for Excel reports (.xls).

**Step 7.** After selecting all report options, click the Run Report button on the upper left side. This will take you to the Check Report Status tab where you can monitor the status.

**Step 8.** The report completion status will not automatically refresh until you click Refresh Status once. The report status will show as Complete when it is ready for viewing.

**Step 9.** Double-click the report name or click the View Report button to download the report.

**Step 10.** Click on report in your browser download bar to view in a new browser tab.

If you want to run a report for **selected employees**:

**Step 1.** Display employees in any Genie such as QuickFind or Pay Period Close Detail.

**Step 2.** Select desired employees. Shift click allows you to select all employees in a series. Ctrl click allows you to select nonadjacent employees.

**Step 3.** Once employees have been selected, access Reports through the Go To menu.

**Step 4.** In the Reports tab, browse through your available reports to locate the report you wish to run. Expand the “All” category by clicking on the “+” to display all reports you can access.
Step 5. Click on the report name to open the report options on the right side of the workspace.

Step 6. Leave the predefined hyperfind defaulted as “Previously Selected Employee(s)”.

Step 7. Follow steps 5-10 above.
**Glossary**

**Accrual:** An amount of leave an employee is entitled to use. Examples include vacation, sick, and comp time.

**Approval:** Action done by the employee and manager indicating an employee, timecard is complete and ready for processing.

**Labor Account:** A home labor account assigned to each employee which hours accrue, unless a shift is an account transfer. Labor accounts consist of valid combinations of labor level entries, such as account and job.

**Labor Level Transfer Set:** A list of active distributions for an employee. Variable employees need to identify which active distribution or job the hours worked belong to.

**Pay Code:** A category that enables you organize time or money, such as vacation or sick time.

**Pay Period:** The period of time for which employees are regularly paid.

**Percent Allocation Rule:** Configuration that automates transfers for fixed employees with more than one active distribution.

**Shift:** A span of time that has a start and end times, usually in one 24-hour period. For example – 7:00 AM to 3:30 PM

**Single Sign-On:** A session/user authentication process that allows a user to provide his or her credentials

**Sign Off:** Action done by the Payroll Manager to prevent further timecard and schedule edits, and to flag the timecard data for inclusion in the upload.

**Transfer:** Hours or pay code amounts transferred to a different job or labor account when an employee has more than one active distribution.