Project Recap - Why are we switching to Kronos?

Case for Change
- Prepares campus for UCPath
- Reduces errors and re-work from manual entry
- Promotes accurate pay for employees and compliance with state and federal pay and leave rules, university policies, and labor contracts

Benefits
- Allows tracking of time worked against multiple jobs
- Provides improved visibility of work time, leave usage, and leave balances to employees and supervisors/managers
- Automatically calculates accruals to avoid employee errors
- Saves most staff time and effort
Departmental Meeting
- Smaller meetings with department Business Officers and Financial Assistants to review the onboarding process and gather data.
- Departments identify Timekeepers and Payroll Managers.

Timekeeper/Payroll Manager Training
- ETS provides an in-depth training sessions to prepare department Timekeepers and Payroll Managers to use Kronos.

Manager Training
- ETS provides job aides, a user manual, and an online course to help staff managers and faculty supervisors review and approve employee timecards.

Employee Training Documents
- ETS provides user guides and job aids to assist employees in reporting hours worked and leave taken.
- Departments distribute user guides and job aids to employees.

Go-Live
- Following Go-Live, employees begin tracking hours worked and leave taken in Kronos.
- Timekeepers and Payroll Managers begin processing timecards via Kronos.
Training Objectives

Timekeepers and Payroll Managers should understand:

- What the various roles, actions, and time entry methods are in the application.

- How to access the application including user interface features and navigation functions.

- How employees import into the application and configuration required prior to and after import.

- How to review timecards and make timecard edits.

- How departments are involved in Payroll processing, including running payroll reports.

- How to request help (ETSC).
Kronos Basics
**Roles**

- **Employee**
  - Records time and approves personal timecard
  - Any employee who needs to track their time.

- **Manager**
  - Reviews, edits, and approves employees’ timecard.
  - Supervisor, manager, Principal Investigator; anyone who views employees’ timecards.

- **Timekeeper**
  - Sets up new employees in Kronos and assists managers with timecard activities, including transferring hours to applicable labor accounts.
  - Payroll analyst, payroll assistant, payroll processor.

- **Payroll Manager**
  - Signs off timecards for upload to PPS and reviews upload reports after payroll is processed.
  - Payroll/personnel manager, the MSO/business officer, financial manager.
There are three methods for employees to record hours worked and leave taken in Kronos:

- **Time Clock**
  - punch in and out using a badge at a physical device.

- **Electronic Timestamp**
  - punch in and out using a function within the Kronos application.

- **Electronic Timecard**
  - enter hours worked or leave taken directly on an electronic timecard.
Time Entry Methods

- Time Clock
- Timecard
- Timestamp
<table>
<thead>
<tr>
<th><strong>General Terms</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workspaces:</strong></td>
</tr>
<tr>
<td><strong>Genie/Widget:</strong></td>
</tr>
<tr>
<td><strong>HyperFind Query:</strong></td>
</tr>
<tr>
<td><strong>Labor Levels:</strong></td>
</tr>
<tr>
<td><strong>Primary Labor Account:</strong></td>
</tr>
</tbody>
</table>
### Approval

Action done by the Employee and Manager(s) to indicate an employee timecard is complete and acceptable for payroll processing.

Corresponding paper timecard processing action: Signing the paper timecard.

### Sign-off

Action done by the Payroll Manager to prevent further timecard and schedule edits, and to indicate records are approved for payroll processing.

Corresponding paper timecard processing action: Certifies timecard data for entry into PPS.

### Transfer

Allocation of hours to non-primary labor account(s). Typically used when an employee works in more than one job. Transfers can be automated using Percent Allocation Rules.

Corresponding paper timecard processing action: Assigning hours for split funding distributions.
Accessing the Application
Log On and Off

Click on link provided above under “Timekeeping Log on.”

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.
• Workspaces and Navigation

• Exercise

1. Log into system
2. Navigate workspace
Employee Hired in PPS

TK/PM enters Employee into TMAA

TK/PM Configures Employee in Kronos

Employee Records Time

Employee/Manager(s) Approves Timecard

PM Signs-off Timecard

Kronos Uploads Data to PPS
Sharing Employees
Timekeeping staff have the following responsibilities:

Know how to view shared employees via the following queries:
- All Home and Eligible Transfers
- All Home and Transferred-In
- All Variable LLTS

Work directly with shared departments to ensure mutually compatible **People Record** setup and workflow timing for timecard Sign-Off by one of the departments.
The format of the job transfer data for the employee is: DEPT_WorkStudyCode_HourlyRate \{Labor Account\}

**Variable Employees**

- Will have a Labor Level Transfer Set (LLTS) that allows them to choose the account string that applies to their shift.

**Fixed employees**

- Will have a Percent Allocation Rule (PAR) that automatically allocates time according to the fixed distribution percentage.
Exercise

1. View “All Home and Eligible Transfers” query
2. View “All Home and Transferred - In” query
3. View “All Variable LLTS” query
**Timekeeping Process**

1. **Employee Hired in PPS**
   - TK/PM enters Employee into TMAA

2. **TK/PM Configures Employee in Kronos**

3. **Employee Records Time**

4. **Employee/Manager(s) Approves Timecard**

5. **PM Signs-off Timecard**

6. **Kronos Uploads Data to PPS**

**Steps:**
- **Employee Imports into Kronos**
- **Employee Works**
- **Pay Period Ends**

**Process Overview:**
- Employee is hired in PPS.
- TK/PM enters the employee into TMAA.
- TK/PM configures the employee in Kronos.
- The employee records their time worked.
- Employee/Manager(s) approves the timecard.
- PM signs-off the timecard.
- Kronos uploads data to PPS.
Import Overview

- PPS
  - Employee Information

- TMAA
  - Access Control Numbers

- Kronos
Exercise

1. Employee Configuration Walkthrough
Training Objectives

Timekeepers and Payroll Managers should understand:

- What the various roles, actions, and time entry methods are in the application.
- How to access the application including user interface features and navigation functions.
- How employees import into the application and configuration required prior to and after import.

- How to review timecards and make timecard edits.
- How departments are involved in Payroll processing, including running payroll reports.
- How to request help (ETSC).
BREAK
Training Objectives

Timekeepers and Payroll Managers should understand:

✓ What the various roles, actions, and time entry methods are in the application.

✓ How to access the application including user interface features and navigation functions.

✓ How employees import into the application and configuration required prior to and after import.

• How to review timecards and make timecard edits.

• How departments are involved in Payroll processing, including running payroll reports.

• How to request help (ETSC).
**Timekeeping Process**

1. **Employee Hired in PPS**
2. **TK/PM enters Employee into TMAA**
3. **TK/PM Configures Employee in Kronos**
4. **Employee Records Time**
5. **Employee/Manager(s) Approves Timecard**
6. **PM Signs-off Timecard**
7. **Kronos Uploads Data to PPS**

- **Employee Imports into Kronos**
- **Employee Works**
- **Pay Period Ends**

Employee works during the pay period, and the process ends with data being uploaded from Kronos to PPS.
Timecard Actions

Manager OR Employee Approval

Manager & Employee Approval

Sign-off
# Timecard Indicators

<table>
<thead>
<tr>
<th>Date</th>
<th>Pay Code</th>
<th>Amount</th>
<th>In</th>
<th>Transfer</th>
<th>Out</th>
<th>In</th>
</tr>
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<tbody>
<tr>
<td>Sat 6/03</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Sun 6/04</td>
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<tr>
<td>Mon 6/05</td>
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<td></td>
<td>7:00AM</td>
<td></td>
<td>12:00PM</td>
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<tr>
<td>Tue 6/06</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wed 6/07</td>
<td>Sick</td>
<td>5.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thu 6/08</td>
<td>Sick</td>
<td>5.00</td>
<td>7:00AM</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Fri 6/09</td>
<td></td>
<td></td>
<td>7:00AM</td>
<td></td>
<td>12:00PM</td>
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<tr>
<td>Sat 6/10</td>
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<tr>
<td>Sun 6/11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>12:00PM</td>
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<tr>
<td>Mon 6/12</td>
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<tr>
<td>Tue 6/13</td>
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<tr>
<td>Wed 6/14</td>
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<tr>
<td>Thu 6/15</td>
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</tbody>
</table>
1. Timecards viewed from a Genie (common) Pay Period
2. Timecard Edits
3. Timecard Comments
4. Add New Row
5. Add Pay Code
6. Edit Pay Code
7. Add and Edit Punch
8. Account Transfers
System Notifications
## Common Notifications

### Approvals

- Employees receive a notification to approve their personal timecard. Students do not receive these notifications if there are no hours on their timecard.
- Managers receive notifications if employee and/or manager approvals are missing.
- There are no notifications for approvals (employee or manager) of MO Positive Pay (mid month to mid month) employees.

### Nearing Vacation Maximums

- Employees will receive notification when nearing their maximum vacation accruals at specified times.

### 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.
Payroll Processing
**Timekeeping Process**

1. **Employee Hired in PPS**
   - TK/PM enters Employee into TMAA
2. **TK/PM Configures Employee in Kronos**
3. **Employee Records Time**
4. **Employee/Manager(s) Approves Timecard**
5. **PM Signs-off Timecard**
6. **Kronos Uploads Data to PPS**

**Key Steps**:
- TK/PM Configures Employee in Kronos
- Employee Imports into Kronos
- Employee Works
- Pay Period Ends
- Employee Imports into Kronos
- Employee Hired in PPS
- TK/PM enters Employee into TMAA
- Employee Records Time
- Employee/Manager(s) Approves Timecard
- PM Signs-off Timecard
- Kronos Uploads Data to PPS
Payroll Processing Schedule

BIWEEKLY PAYROLL CALENDAR AT-A-GLANCE

○ = Biweekly Payday
○ = No Flat Rate Deductions Biweekly Payday
□ = B1 Pay Period End
□ = B2 Pay Period End
◆ = Vacation and Sick earned

January 2017

February 2017

March 2017

April 2017

May 2017

June 2017

July 2017

August 2017

UCSB

2017
## What Uploads

<table>
<thead>
<tr>
<th>Pay Code</th>
<th>Positive Pay (Variable)</th>
<th>Exception Pay (Fixed)</th>
<th>Doesn't Upload</th>
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</thead>
<tbody>
<tr>
<td>Hours Worked (Regular)</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shift Differential (SD: 501, Cue, Student, SX)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>✔</td>
<td></td>
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</tr>
<tr>
<td>OTH, OTS, OTP, OT2</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>CT Taken</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CT Payout</td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Comp Time Accrued (CTH, CTS, CTP, CT2)</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sick Taken</td>
<td>✔</td>
<td></td>
<td></td>
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<tr>
<td>Vacation Taken</td>
<td>✔</td>
<td></td>
<td></td>
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<tr>
<td>Catastrophic Leave Donated</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Catastrophic Leave Received</td>
<td></td>
<td></td>
<td>✔</td>
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<tr>
<td>ERIT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leave No Sal (LNS)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Not Worked</td>
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</table>
Common Reports

- **Exception Report – Labor Levels Summary**: Compares labor account data on the timecard with PPS to reveal any LAFS discrepancies that may cause data to be excluded from the upload to the payroll system.

- **UCSB Payroll Export Register**: Lists employee hours that uploaded to the payroll system in the most recently processed pay period.

- **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.
Exercise

1. Review Exception Report
2. Review Pay Period Close/Review and Sign-off timecards
3. Run and Review UCSB Payroll Export Register (create favorites)
Reference Materials

Timekeeping at UCSB

Timekeeping is the process of tracking and reporting hours worked and leave time taken. Employees, supervisors, and timekeepers all have a vital role to play in the timekeeping process. Please explore this site for more information about timekeeping at UCSB.

- Employees report work and leave time on their timecards
- Supervisors review and approve their employees’ timecards
- Payroll Managers sign off on their units’ timecards

For Employees

For Supervisors

For Payroll Managers & Timekeepers

For Information about the ongoing transition to Electronic Timekeeping, please visit the Electronic Timekeeping project page.

Scheduled Maintenance

June 14, 2017
Q & A
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✓ How departments are involved in Payroll processing, including running payroll reports.

✓ How to request help (ETSC).
Please fill out the survey

Employees in your department will start using Kronos on these dates:

- Biweekly: 11/19/2017
- Monthly: 12/1/2017
- Monthly Positive Pay: 12/16/2017