KRONOS
TRAINING MANUAL

Managers

PILOT (TEST) GROUP

East Carolina University

Department of Human Resources
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Introduction to Kronos

What is Kronos?

- Kronos is a Time and Attendance and Leave Reporting System that ECU has purchased to automate all timekeeping and leave reporting methods campus wide.
- All employees who track either hours worked, leave taken, or both, will eventually use Kronos.
- Regulations, rules, policies, pay rules and leave accrual rates have been configured into the Kronos system so it will automatically calculate OT, shift differentials, holiday premiums, leave balances, etc. according to ECU policies. Kronos will use information from the employee and job records in Banner like Employee Class, FTE, Leave Category, Years of Service, Effective Dates, etc. to determine the appropriate Pay Rules and Accrual Profiles in Kronos.
- Kronos will replace Banner Web Time Entry and ECU Mass Time Entry (once everyone is on Kronos). Kronos will interface to Banner.
- Kronos is the tool employees, supervisors, departments and upper management will use for managing and reporting time worked and leave balances.
- Kronos will be implemented in phases over a long period of time until all designated employees are using Kronos.

Flow of Information

- Each day an interface runs from Banner to Kronos to add or update employee information.
- Employees maintain their Kronos Timecard each pay period, as necessary.
- Managers approve Requests for Time Off as needed
- Managers will evaluate any “exceptions” or timecard problems each day
- Pay Period Ends (15th or last day of month)
- Employee Approves their Timecard
- Managers Approve and Sign Off employee timecards by the end of the second business day after the end of the pay period. NOTE: Sign Off is required. Some departments require an additional level of Approval before Sign Off
- Payroll will run the interface from Kronos to Banner and begin processing the next payroll
- Pay from Kronos will be included on the next payroll.
### Who Will Use Kronos?

<table>
<thead>
<tr>
<th>Type of Employee</th>
<th>What they do in Kronos</th>
<th>Type of Timecard in Kronos</th>
<th>Time Entry Information</th>
<th>What goes from Kronos to Banner?</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPA and CSS Exempt</td>
<td>Request Time Off, Track Leave, Record special non-regular hours like Shift Diff, etc., Approve and submit timecard each semi-monthly pay period</td>
<td>Project View</td>
<td>Daily hours default from schedule. Employee makes adjustments to timecard for leave and special forms of pay.</td>
<td>Leave balance hours paid out upon transfer or termination, Extended Duty hours, Holiday Premium, Shift Diff, CSS On Call</td>
</tr>
<tr>
<td>SPA and CSS Non Exempt</td>
<td>Log time in and out every day, Request Time Off, Track Leave, Approve and submit timecard each semi-monthly pay period</td>
<td>Hourly View</td>
<td>Time Clock or Time Stamp on web</td>
<td>Additional pay like OT, Shift, etc. tracked in Kronos and paid the following pay period. Regular hours are still paid via salary from Banner on current pay period.</td>
</tr>
<tr>
<td>SPA and CSS Temps and Intermittent</td>
<td>Log time in and out every day, Approve and submit timecard each semi-monthly pay period</td>
<td>Hourly View</td>
<td>Time Clock or Time Stamp on web</td>
<td>All hours worked will interface to Banner for payment on the following pay period.</td>
</tr>
<tr>
<td>Self Help and Work Study Students</td>
<td>Log time in and out every day, Approve and submit timecard each semi-monthly pay period</td>
<td>Hourly View</td>
<td>Time Clock or Time Stamp on web</td>
<td>All hours worked will interface to Banner for payment on the following pay period.</td>
</tr>
<tr>
<td>Casual Employees</td>
<td>Log time in and out every day, Approve and submit timecard each semi-monthly pay period</td>
<td>Hourly View</td>
<td></td>
<td>All hours worked will interface to Banner for payment on the following pay period.</td>
</tr>
<tr>
<td>EPA 12 month Faculty</td>
<td>Request Time Off, Track Leave, Approve and submit timecard each semi-monthly pay period</td>
<td>Project View</td>
<td>Daily hours default from schedule. Employee makes adjustments to timecard for leave.</td>
<td>Health Sciences clinical faculty supplemental pay codes, when used, will be entered on Kronos timecards by appropriate managers and will interface to Banner for payment on next pay period.</td>
</tr>
<tr>
<td>EPA Non Faculty</td>
<td>Request Time Off, Track Leave, Approve and submit timecard each semi-monthly pay period</td>
<td>Project View</td>
<td>Daily hours default from schedule. Employee makes adjustments to timecard for leave.</td>
<td>Leave balance hours paid out upon termination</td>
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<td>EPA 9 month Faculty</td>
<td>Not in Kronos</td>
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<td>EPA Temporary</td>
<td>Not in Kronos</td>
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<td>Graduate Assistants</td>
<td>Not in Kronos</td>
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<td>Undergraduate Assistants</td>
<td>Not in Kronos</td>
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<tr>
<td>Post Doctoral Fellows</td>
<td>Not in Kronos</td>
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Logging On and Off

Managers

In Kronos, anyone who is responsible for more than just interacting with their own timecard has a Manager’s license and is referred to as Manager. Some Managers might approve timecards, others may just do reporting for their department. Kronos has a special user interface for Managers that organizes tasks and Manager activities in an easier way. For this reason, Managers will access Kronos using a different url. Everything a Manager needs, including employee tasks and their own timecard, is accessible from the Manager interface so they will still use just one url.

Training Environment

Use the following URL to access Kronos TRAIN. The Training environment will be used during training classes and will continue to be available to you for some time after training. You should have the same access in TRAIN that you will have in Production.

http://KRONTEST2.intra.ecu.edu/wfc/navigator/logon

Log On with your PirateID for User Name and your usual Password. Kronos TRAIN uses the same PirateID and Password as Email, OneStop, etc.
**Production Environment**

Once you are told to begin using Kronos to track your time and leave, and to manage the time and leave for your department, you will be given the appropriate URL to access Kronos PROD.

**Logging Off**

Always click **Sign Out** to end your work session.
Timecard Parts

Hourly View for Non Exempt Employees

**Timecard Header** – Name and Banner ID will appear here. You can change the Time Period to show Current Pay Period, Previous Pay Period, Range of Dates, etc.

**Action Menu** – Certain actions like running reports and approving your timecard are done from here.

**Timecard Grid** - Non Exempt employees will log time in and out, including lunch, every day using TimeStamp or a Time Clock. Punches for Hours Worked will appear here. Time from a Request for Time Off will appear here or may be entered here. Special situations like On Call hours will also be entered here.

**Schedule** – Your schedule, entered by a Manager in your department, will appear here. All permanent employees must have a schedule. Kronos will compare timecard information to the schedule to determine special circumstances like Shift Differentials, worked Holidays, etc.

**Timecard Tabs** – your timecard will default to the Totals and Schedule view as shown which shows your weekly totals and schedule. Click on the other tabs to view additional information.
**Project View for Exempt and EPA Employees**

**Timecard Header** – Name and Banner ID will appear here. You can change the Time Period to show Current Pay Period, Previous Pay Period, Range of Dates, etc.

**Action Menu** – Certain actions like running reports and approving your timecard are done from here.

**Timecard Grid** – Most exempt and EPA employees will only enter exception time on their timecard. Daily hours will default in from your schedule. Time from a Request for Time Off will appear here or may be entered here. Other types of exception pay for which you are eligible should be entered here.

**Schedule** – Your schedule, entered by a Manager in your department, will appear here. All permanent employees must have a schedule. For exempt employees, the schedule will determine the number of daily hours. If you work a flex schedule where daily hours vary, your schedule should reflect that.

**Timecard Tabs** – your timecard will default to the Totals and Schedule view as shown which shows your weekly totals and schedule. Click on the other tabs to view additional information.
Timecard Indicators and Colors

Icons and colors enable you to quickly recognize items in the timecard. The following information might appear in the timecard.

After logging into Workforce Timekeeper and selecting “My Timecard” from the “My Information” tab, the timecard is displayed.

**MY TIMECARD** – The color of the words MY TIMECARD are important when working in Workforce Timekeeper.

**Black** – When the MY TIMECARD displays as black, the timecard is saved.

**Orange** – When the MY TIMECARD displays in Orange and shows an “*” the timecard has unsaved changes. The timecard must be saved to retain the pending changes. Clicking on “Save” will change the color from Orange to Black.
**Purple** – Time displayed in purple indicates it was pre-populated by the employee’s schedule. In the example below, notice the “**Hours Worked**” and the actual hours are displayed in **Purple**.

![Example of Purple Time Display](image)

**Purple with White Background** – A transaction shown in purple on a white background was added by the system and the cell value can be edited.

![Example of Purple with White Background](image)

**Purple with Gray Background** – A transaction shown in purple on a gray background was added by the system and the data value can not be edited. This includes holiday transactions, a bonus, shifts that span two days, locked pay period adjustments, on-call pay, etc.

![Example of Purple with Gray Background](image)

**Blue** – A date cell bordered in blue indicates an excused absence.

![Example of Blue Absence](image)

**Yellow Comments Note** – A yellow note icon after a punch or amount indicates a comment about the cell’s contents. Point to the icon or select the Comments tab at the bottom of the timecard workspace to view the comment.

![Example of Yellow Comments Note](image)
**Red** – Severe alert. Hovering the mouse over the field displayed in red reveals a box with more information.

- A red border around a cell indicates an exception such as a late punch, early punch, or long interval. Mouse over the cell for more information.

![5:00PM](image)

- A cell bordered in red and containing a yellow note icon indicates that a punch or amount has a comment on an exception.

![6:30AM](image)  
12:30PM

- A date cell bordered in red indicates an unexcused absence day.

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<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Wed 11/02</td>
<td>Thu 11/03</td>
<td>Fri 11/04</td>
</tr>
</tbody>
</table>

**Solid Red Box** – A solid red cell indicates a missed in punch or out-punch. Mouse over the red box for more information.

![Missed Out-Punch](image)

**Adding a row to the timecard** -

**Deleting a row in the timecard** -

**Gray Cell** - Gray cells indicate that you cannot edit the cells.

**Green** – A green border around a cell indicates missing time that a manager has justified or marked as reviewed. A green border around a date indicates an absence that a manager has justified or marked as reviewed.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Out</td>
<td>2:00PM</td>
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<p>| |</p>
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<tbody>
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<td>1:00</td>
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<td>1:00</td>
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</tbody>
</table>
Punch Rounding Rules

Rounding is a method used to adjust the time an employee starts or ends work backward or forward in order to simplify the calculation of worked hours. This ensures that employee start and end times are based on a specified interval. ECU will round in and out punches in 15 minute intervals with a 7 minute grace period. This means that punches at ECU will round to the nearest quarter hour. A punch 7 minutes after the quarter-hour will round back. A punch 8 minutes after the quarter-hour will round forward to the next quarter-hour.

The only exception to this rounding rule is the IN punch at the start of an employee’s scheduled shift. In order to give employees plenty of time to punch in, any IN punch 15 minutes before the scheduled start time will round to the start time.

Actual punch times will show on the timecard but Kronos will use the rounded time when calculating hours worked.

Examples:

Pee Dee Pirate is scheduled to work from 8:00am to 5:00pm with an hour for lunch.

- At the start of his shift, Pee Dee can punch IN anytime between 7:45am and 8:07am and Kronos will interpret his punch as 8:00am.
- If Pee Dee punches IN between 7:38am and 7:44am, Kronos will interpret his punch as 7:45am.
- If Pee Dee punches IN between 7:23am and 7:37am, Kronos will interpret his punch as 7:30am.
- If Pee Dee punches IN between 8:08am and 8:22, Kronos will interpret his punch as 8:15am.
- If Pee Dee punches OUT for the day between 4:53pm and 5:07pm, Kronos will interpret his punch as 5:00pm.
- If Pee Dee punches OUT for the day between 5:08pm and 5:22pm, Kronos will interpret his punch as 5:15pm.

Lunch Interval

Lunch periods are also rounded, but not in the same way as IN and OUT punches. Kronos will look at the entire lunch period and round based on the total time period of the break versus rounding on the IN and OUT punches. The total time period will still be rounded based on the quarter hour, with 7 minutes rounding back to the quarter hour and 8 minutes rounding forward.

Examples:

Pee Dee Pirate is scheduled to work from 8:00am to 5:00pm with an hour for lunch.

- If Pee Dee punches out for lunch at 12:05 pm, then punches back in from lunch at 1:20pm, Kronos will calculate the actual length of the break, which is 1 hour and 15 minutes. Since the total length of the break already equals a quarter hour, Kronos will charge 1 hour and 15 minutes for lunch.
• If Pee Dee punches out for lunch at 11:56, then punches back in from lunch at 1:03pm, Kronos will calculate the actual length of the break, which is 1 hour and 7 minutes. Based on the rounding rules, Kronos will charge 1 hour for lunch.

• If Pee Dee punches out for lunch at 12:10pm, then punches back in from lunch at 12:52pm, Kronos will calculate the actual length of the break, which is 42 minutes. Based on the rounding rules, Kronos will charge 45 minutes for lunch.

• If Pee Dee punches out for lunch at 11:57pm, then punches back in from lunch at 1:06pm, Kronos will calculate the actual length of the break, which is 1 hour and 9 minutes. Based on the rounding rules, Kronos will charge 1 hour and 15 minutes for lunch.

For employees scheduled with a 30 minute lunch, the same rounding rules will apply. A 37 minute lunch will be charged as 30 minutes. A 38 minute lunch will be charged as 45 minutes – the nearest quarter hour.
How to Request Time Off

You can request leave time, in advance, whenever you know you will need paid time off. You may request time off, in advance, for any of the types of leave for which you are eligible (Vacation, Bonus Vacation, Sick (for appointments or procedures), Professional, Community Service Leave, etc.)

- Log on to Kronos with your PirateID and password
- Go to My Information, My Requests
- The screen below will appear. It defaults to a calendar for the current pay period.

For Time Period, click on the drop down box and select the period that includes the date or dates on which you want to request time off.
- Click Apply. The calendar view will change.
- You may click View Width and Apply to change the way the calendar displays.
• Click on each day for which you want to request time off. Clicking on a day will select it. To unselect a day, click on it again. Selected days will become a different color.
• You may request Full or Partial days off.
To Request a Full Day or Range of Days

- Click on **Full Day Request To Use Paid Leave**.
- The date(s) you selected should already appear under **Start Date** and **End Date** on the form that appears on the lower, right side of your screen.
- For **Paycode**, select the code for the type of leave you are requesting from the dropdown list. *(Note: Vacation and Bonus Vacation appear in the list as PTO-Vacation and PTO-Bonus Vacation)*
- Enter **Notes** that will explain your request to your manager.
- Note: You can check your leave balances as of the date you are requesting **Accruals as of xx/xx/xxxx** on the right side of the page.
- Click **Submit**.
To Request a Partial Day

- Click on **Partial Day Request To Use Paid Leave**.
- The date you selected should already appear under **Start Date** on the form that appears on the lower, right side of your screen.
- Enter the **Start Time**. This will tell your manager which portion of the day you plan to take. Kronos will assume **am** so 8am can be entered simply as 8. To indicate **pm**, enter a ‘p’. Noon should be entered as 12p.
- For **Duration**, enter the number of hours you plan to take. Most types of leave can be taken in 5 minute increments with a minimum of 15 minutes. Community Service Leave can be taken in 5 minute increments with a minimum of 1 hour. Two hours and 15 minutes can be entered as 2:15 or 2.25.
- **Paycode**, select the code for the type of leave you are requesting from the dropdown list. *(Note: Vacation and Bonus Vacation appear in the list as PTO-Vacation and PTO-Bonus Vacation)*
- Enter **Notes** that will explain your request to your manager.
- Note: You can check your leave balances as of the date you are requesting **Accruals as of xx/xx/xxxx** on the right side of the page.
- Click **Submit**.
Additional Information

- Once submitted, your request will generate an email to your manager informing them they have a request to process. Managers will also see pending requests when they logon to Kronos.
- For the selected Time Period, your requests will appear under *My Current Requests*. Select the check box and click on Details to see the request. You can also check the status here.

- If you change your mind, you can retract a request *before* your Manager approves it. Click the check box to Select, then choose Retract Request in the Select an Action dropdown. Click Apply.
- The status of your request will change from Submitted to Retracted.
- When your request is approved, you will get an email notification and you will see the status change to Approved.
- When your request is approved, your schedule and your timecard will be updated with the appropriate pay code on the approved date(s).
Introduction to the Manager Interface

Kronos has a special user interface for Managers that organizes tasks in an easier way. Tasks are arranged in a special format called a Navigator. Since different types of managers may have different types of tasks, ECU has created different Navigators for different managers. Managers who approve time cards have a Navigator that looks slightly different from that of a manager who solely does reporting since their tasks are slightly different. Regardless, the print screens in this document will be close to what you see when you log on as a Manager into Kronos.

The entire screen shot above is the Navigator. The boxes in the Navigator are called Widgets. A Widget is just a view into Kronos that helps you complete a common task. Most managers will have up to 7 Widgets on your screen. Inactive Widgets appear minimized along the left and right sides of the screen and display limited information until they are maximized. The Widget in the middle of the screen is the Active Widget. Only one Widget at a time can be active and that is the one you can work with.

All ECU Managers will have some variation of the following Widgets:

- Current Exceptions (Daily)
- Current Time Off Requests (Daily)
- Employee Links (Daily)
- Task List (for end of pay period – tasks may vary) (Pay Period End)
- Delegate Management (As Needed)
- Scheduling Tools (As Needed)
- Manager Links (As Needed)
Current Exceptions and Current Time-Off Requests are Widgets that should be used daily or when a new exception or request occurs.

The two small boxes just below Welcome and Sign Out are called Alerts. The Exceptions Alert goes with the Current Exceptions Widget and the Time Off Request Alert goes with the Current Time-Off Request Widget. The Alerts are used to notify you of new Exceptions or Requests for Time Off that require your attention. The number of employees with Exceptions or Requests will appear in a circle on the Alert Icon.
There are two ways to work with the Alerts.
1. You can hover your mouse over the Alert Icon to view employees who have Exceptions or employees who have Time Off Requests. When you select an employee from the list, the corresponding Widget (Current Exceptions or Current Time Off Requests) opens in the center of your navigator, displaying the detailed view of the employee selected.
2. OR, you can work with either the Current Exceptions or Current Time Off Request Widget any time by clicking the blue title bar, holding your mouse button down and dragging it into the center of your navigator. The Widget opens in the summary view. You can then drill down to the employees who have exceptions.

Employee Links

Use the Employee Links Widget to access your own timecard and to submit Time Off Requests to your supervisor.
Activating and Resizing Widgets

You can either drag the Widgets around or use the little gear in the upper right hand corner to Expand, Pop Out, and Collapse Widgets. Don’t use Close. Closing a Widget puts it in a drawer to the left of your screen. This is only used when someone has so many Widgets that they will not all fit on the screen at once. If you accidentally close a Widget, click on the arrow on the far left of your screen to open the drawer and drag the Widget back on to your navigator.

Once a Widget is active (in the center), you can use the tools in its upper right hand corner to maximize it.

The Wizard – Workflow for Pay Period End

Each Manager has one Widget called a Wizard that is actually a workflow that guides managers through a sequence of steps that should be completed at the end of each pay period. This is especially critical for managers responsible for Sign Off – the final approval of timecards. Managers that approve or sign off timecards have the Timecard Approval Task List. Other Managers have the Task List for Pay Period Close. This Wizard would typically be used the day after the end of the Pay Period. The information shown will default to Previous Pay Period since that is the Pay Period you are now working with. These Wizards will most likely need to be adjusted as we learn more about working with the system.
When activated (dragged into the center), the Wizard will open on the first step. Use the Next and/or Prev buttons to move forward or backward through the steps. Click Done on the last step and it will reset the Wizard to start over with Step 1. Click the help button on any step to see instructions for that step.

For some Managers, the first step is a Set Options page which will enable you to choose a Hyperfind to use for the remaining steps.

Remaining steps are tasks that must be completed and/or information to assist you in completing those tasks. Steps may include:

- **Prior Period Time Off Requests** – Just like the Current Period Time Off Requests Widget but information is now for the Previous Pay Period. This step enables you to process any requests not already taken care of that impact the pay period.

- **Resolve Exceptions** – Just like the Current Exceptions Widget but information is now for the Previous Pay Period. This step enables you to resolve exceptions not already taken care of that impact the pay period.

- **Pay Period End Data** – This step is a genie that displays summary information for the pay period for your employees. You can see totals and drill down to employee detail to evaluate timecard data for the pay period.

- **Approvals Summary** – The step is a genie that enables you to evaluate and/or complete approval and sign off tasks for employee timecards. All TIMECARDS MUST BE SIGNED OFF AT THE END OF THE PAY PERIOD.

- **Group Edit Results** – This step enables you to see the results of actions taken on previous steps.

- **Accrual Balances** – This step is included for Reporting Managers. It is a genie that provides information about employee balances for all types of leave (accruals).
Run Reports – This step is just a link to Kronos Reports so you can run the report of your choice.

Manager Links

This Widget is a list of all the genies, reports and links to other areas in Kronos that you can access. Quickfind is a Kronos delivered genie that you will give you quick access to all your employees. Many of the genies used in your Wizard workflow can also be found here.

Delegate Management

This Widget gives you access to everything you need to designate a delegate, accept or reject a delegate request, and act as a delegate.

Scheduling Tools

This Widget gives you access to everything you need to schedule employees, view schedules and, if applicable, access scheduling tools to create new shifts and patterns for scheduling.
Resolving Timecard Exceptions

1. General Exception Information

Exceptions are flags in timecards, reports and Genies that identify when information on the timecard deviates from the employee’s schedule. Exceptions only apply to non exempt employees. Use exceptions to identify employees who arrive early or late, forget to punch out, and so on. The following are the types of exceptions used at ECU:

**In/Out Punches**
- **Early In** – Employee punched in an hour or more before their scheduled start time
- **Early Out** – Employee punched out an hour or more before their scheduled end time
- **Late In** – Employee punched in an hour or more after their scheduled start time
- **Late Out** – Employee punched out an hour or more after their scheduled end time

**Missed Punch**
Employee forgot to punch in or out

**Unexcused Absence**
Employee is scheduled to work, but the employee’s timecard does not contain any punches or pay code edits that excuse the absence

**Excused Absence**
Employee is scheduled to work, but there is a pay code edit on the timecard for that day that excuses the absence (sick, vacation, etc.)

**Unscheduled**
Employee is not scheduled to work but there is a punch or pay code edit on the timecard for that day

2. Reviewing the Exceptions:

**Current Exceptions** widget is a summary of timecard exceptions for the current pay period that need to be addressed by the manager. The Current Exceptions widget can be used to:

- Add and remove punches
- Add comments
- Mark exceptions as reviewed
- Change an employee’s time to normally scheduled time

“Click” and “Hold” the cursor on the blue tab of the Current Exceptions widget. In the image below, it is the first one on the left below the login information. Drag the Current Exceptions tab into work
space which is the center area of the screen. Each column with values displayed must be addressed by the manager.

The size of the active window displayed can be increased or decreased using the buttons on the top right corner of the active widget. Notice in the image below the arrows on the center button point in on the left image and out on the right image. When the active window is small the button will appear as in the below left image to expand the image. When the active window is expanded, the buttons will appear as in the below right image to decrease the image size.

3. **How to work with Exceptions — In and Out Punches — Marked as reviewed**

With the Current Exceptions widget in the active (center) work space — expand and highlight “In and Out Punches” column.
Sort “In and Out Punches” column by clicking in the “In and Out Punches” cell to show all exceptions at the top of the data.

Click on “Details” above the “In and Out Punches” column to view the details for each employee listed for those exceptions.
Click on “Show Schedule” to view the employee’s work schedule. Review of the employee’s work schedule will indicate why the in and out punches are identified as being exceptions and must be addressed. Think of in and out punches as times when the employee punched in before their schedule is set to begin or out early after their schedule was set to end.
To review each exception, highlight the cell and a message will appear to indicate the action necessary. In addition, the tabs at the bottom of the screen will become “bold” for the actions that may be approved for the highlighted exception.

In this example, the manager will “mark as reviewed” to acknowledge the exception.
Once marked as reviewed, the color changes for the in punch and the tab at the bottom of the screen now appears as “Unmark as Reviewed” in the event the manager selected the wrong action.

4. **How to Add a Missed Punch Using Widget**

Drag “Current Exceptions” widget to middle of screen and expand
Select employee and double click to see exception detail. Click on the cell where you want to add a punch and click the “Add Punch” button at the bottom of the page.

- **Date** should be populated from the cell you selected but you can change it if necessary
- Select the dropdown box by **Insert** to choose the type of punch to add
- Add the punch time (8a, 5:30p, 1p, etc.)
- Click **Add**
- **Save**
NOTE: If you need to add both an **In** and an **Out** punch, Insert **In and Out Punches** so you can add them both together. If you need to add lunch punches, Insert **Break** which enables you to insert and **Out** to lunch and an **In** from lunch at the same time.

*Alternative Method:*

Instead of clicking on the missing punch and using the Add Punch button, you can double click on the missing punch cell and simply type in the time of the punch. Save.

**Change to Scheduled Time**

When adding a missed punch, you may choose to use the time the employee was scheduled to punch in or out. Click on the cell with the missed punch and click on **Change to Scheduled** button at the bottom of the screen.
The scheduled time will appear in the missing punch cell

5. **How to Add a Punch on Timecard**

Punches are recorded in the timesheet grid in the In and Out Columns. It is possible to punch In and Out multiple times each work day. This is achieved in 2 pairs of In and Out punches per row of data. You can insert an additional row for each day using the button.

Punches are keyed as numeric values which Kronos will store as time values. Letters “a” and “p” are used to designate AM or PM. If the letter is not entered, the system defaults to AM unless you enter 12.

**Examples:**
- 8 = 8:00AM
- 3p = 3:00PM
- 815a = 8:15AM
- 1135 = 11:35AM
- 12 = 12:00PM (noon)
- 501p = 5:01PM
12a = 12:00AM (midnight)  
6a = 6:00AM

Click on area of missed punch and key correct time. Save
Click on comments to add a comment. Save

6. **ADDING COMMENTS TO TIMECARD PUNCHES**

Comments should be entered by the manager for exceptions in the timecard and anytime changes are made to punches.

- Click on the box for the punch that needs comment.
- Select Comment->Add Comment-> from the navigation bar.
- Select appropriate comment from the list and add custom note. Hit OK.
- The comment icon will show in the box with the punch.
- The comment and note will be visible in the COMMENTS tab at the bottom.
### Kronos Managers Manual

#### Timecard

#### Totals & Schedule

<table>
<thead>
<tr>
<th>Account</th>
<th>Pay Code</th>
<th>Amount</th>
<th>Weight</th>
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<td>2.30</td>
<td>72.33</td>
</tr>
<tr>
<td>161000</td>
<td>12.50</td>
<td>2.30</td>
<td>72.33</td>
</tr>
</tbody>
</table>

#### Add Comment

**Comments**
- Employee PIN Error
- GPS data collected from the phone
- Late - Car Problems
- Late - Family Emergency
- Late - Weather
- Meeting
- OT Approved
- Time Card Approved
- Unscheduled Shift Approval

**Note**
I asked employee to come in and work this extra shift for a sick employee. MGR

---

**Log Off, Change Password, Setup Info**

**General**
- Payroll
- HRIS
- Scheduling
- Record Retention
- Device Manager
- Data Integration

**My Setup**
- Timecard
- Schedule
- People
- Reports
- More

**Time Period**
- Current Period

**Actions**
- Add Comment

**Attendance**
- 1:00PM
- 2:00PM

**Transfer**
- In
- Out

**Shift**
- Daily

**Cumulative**
- 24:00
- 50:00

---

**Kronos WORFGRACE CENTRAL**
7. **How to Remove an Erroneous Punch**

Removing a punch is necessary when a punch is entered in error.

**Process when using the Widget:**

Hover over the Exceptions Widget until the employee list shows.

Select Desired Employee and their punch information for exceptions will appear in the center of the screen as shown in the below sample:
Select the punch that needs to be removed and click on the remove button in the bottom right corner.

Save the changes by clicking on the save button in the upper right hand corner.
The punch will be removed and replaced with a red box indicating a missed punch.

<table>
<thead>
<tr>
<th>Date</th>
<th>Pay Code</th>
<th>Amount</th>
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<th>Out</th>
<th>Transfer</th>
<th>Daily</th>
<th>Sum</th>
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<tbody>
<tr>
<td>Mon 10/17</td>
<td>6:00am</td>
<td>3:00pm</td>
<td>11:00</td>
<td>11:00</td>
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<td>10:00am</td>
<td>5:00pm</td>
<td>6:00</td>
<td>20.00</td>
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<td>10:00am</td>
<td>16:00</td>
<td>42.00</td>
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<td></td>
</tr>
<tr>
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<td></td>
<td>14:00</td>
<td>50.00</td>
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</tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>Mon 10/31</td>
<td></td>
<td>8:32am</td>
<td></td>
<td></td>
<td>35.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Process from Employee Timecard**
From Manager Links Select Reconcile Timecard

Select Desired Employee’s Timecard by double clicking on that employee’s name

Select the punch that needs to be deleted by clicking on it once
Press the delete key on your keyboard to delete the punch.

Select Save on the menu bar above the timecard. Your Punch has been removed.

**Reviewing Other Exceptions:**

**Unexcused Absence**
Determine why there are no punches or pay codes that explain the employee’s absence. You may need to add Missed Punches. For time off, you can add a pay code or ask the employee to add a pay code to use leave.

**Excused Absence and Unscheduled Exceptions are just for your information**
How to Process Time Off Requests

When you logon to Kronos, there are two ways to access Time Off Requests.

Recently submitted Time Off Requests will appear as Alerts (with the number of requests in the corner).

To access requests from the Alert icon, hover over the icon and a list of schedule periods will appear. Click on a date range in the list and the Current Time-Off Request Widget will open and move to the center of your screen.

You can also open the Current Time Off Request Widget by dragging it from the side into the center of your screen.

- Click on the button in the upper right corner of the widget to expand it to the full screen.
To process a request, click on the request to open. Details and Comments will appear at the bottom of the screen.

Evaluate the request. Check leave balances by clicking on the Balance tab. Leave balances as of the date requested will appear.
• To add a Comment, click on the **Comment** button.

• The **Add Request Comments** box will appear
• Check the Comment you wish to use and then **Click on the Add** to add a Note

• **Click on New Note Here.** Delete the new note text and replace it with your own text
• **Click Save**
- Your note will now appear under Comments on the Details screen.

- To Approve the request, click on Approve.
- To Reject the request, click on Reject.
- Click on the to return the Widget to normal size.
Using Genies and Hyperfinds

Genies are employee data views. A Genie lists pre-defined data elements for employees selected in Show for the period of time selected in Time Period. We have created many different Genies for Managers to use. They are listed under Manager Links and some are used in a Task List at the end of each pay period. Users can drill down to employee details and launch other functions from a Genie.

In the Genies workspace, you can:

- Change the employees displayed by changing the HyperFind query in Show (cannot do in QuickFind genie).
- Change the time period.
- Double-click an employee to view the employee's timecard.
- Select one or more employees and then select a function on the menu bar or right-click menu, such as Approvals > Sign Off.
- Select one or more employees, and then use the launch buttons to open Timecard, Scheduler, the People Editor, and More.
Sorting and refreshing data in a Genie

You cannot change the columns that are included in a genie but you can change the sort order of the information by clicking at the top of the column you want to sort by. For example, you may want to sort the employees in alphabetical order so you click on the Name column. Or maybe you want to see only employees with a Missed Punch so you click on the Missed Punch column.

Anytime you change what is in the Show or Time Period boxes, you need to refresh the data by clicking Refresh.
Exporting Genie data

Most genies will allow you to export all the data to Excel. This may be especially helpful if you’d like to share the information with another manager in your department. To export the contents of the Genie, click on Actions and then select Export to Excel from the list.

Hyperfinds

The Show box is where Hyperfinds are used. Hyperfinds are queries. They are filters that can be used with Genies and Reports to display results only for people who meet certain criteria i.e. employees with OT on their timecard. This is what goes in the Show area. The default in many cases is Home. Home returns all the people you are permitted to access. We have created many different Hyperfinds for you to use. Most of the time, the Hyperfinds we have created will meet your needs but, if necessary, you can create your own.
How to Schedule Employees

Managers can assign schedules to employees from the Schedule Editor or from any genie that lists employees.

Adding Employees to a Schedule Group from a Genie

This can be done from any Genie that lists employees, like Quickfind.

1. Hold the CTRL key down and highlight all employees to be added to the group.
2. Select Schedule from the Menu across the top.
3. Select Add to Group. Add to Group dialog box appears.
4. Select the appropriate Schedule Group from the drop down list.
5. Select the Start Date and End Date. If there is no End Date, you can select Forever. Note: You cannot select a Start Date earlier than the Time Period selected in the genie.
6. Employee(s) can only belong to one inheritance group at a time for the date range selected. Leave the “Remove employees from other schedule inheritance groups for selected date range” checked.
7. Click OK.
Scheduling Employees from the Schedule Editor

Open the Schedule Tools Widgets and select Schedule Editor – this lists all of their people in one place, by scheduling period. You can schedule BY EMPLOYEE or BY GROUP. If scheduling many employees who all work the same schedule, use Group. For employees with unique schedules, use Employee.

To Schedule by Group – generally used when many employees work the same schedule

1. Click By Group.
2. Hold the CTRL key down to select the employees you want to schedule.
3. Right click and select Add to Group.
4. Select the Schedule Group from the dropdown list.
5. Enter the Start Date. Start Date cannot be earlier than the start of the Schedule Period selected in the Schedule Editor.

6. If this is not a temporary schedule, the End Date can be Forever (you can always make changes in the future). If schedule is temporary, enter an End Date.
7. Leave the Remove employees from other schedule inheritance groups for selected date range box checked.
8. Click OK.
9. Click Save and then click Refresh. Employees are organized by Group so you’ll need to scroll to the appropriate group to see the schedule for the employees you just added.

Note: If a group has never been used before, the schedule will not appear.

1. In Schedule Editor, go to Schedule by Group
2. Click on the line for the group, not an employee
3. Right click and Edit Pattern.
4. Attach the pattern to the group from the start of the scheduling period
5. Enter the start of the scheduling period as the Work Start Date – not in past
6. Click on any day and Insert Pattern – that will fill in the days per the pattern
7. Click OK
8. Now the schedule will appear for the Group and for everyone in the Group.
To change the schedule for a Group

1. Go the Current Schedule Period and Edit Pattern for the Group and put in an End Date.
2. Then go to the Next Schedule Period and create a new pattern from the new date to forever.

To Schedule by Employee — generally used when an employee works a unique schedule

1. Click By Employee.
2. Highlight the employee you want to schedule. Hold the CTRL key down to select more than one.
3. Right click and select Add Pattern. Select Shift or Pay Code.

4. Work Start Date – this should be the start of the Scheduling Period selected in the Schedule Editor. Scheduling periods are one month. To add a schedule that starts at the beginning of the current schedule period, enter the first day of the month.

5. Click Insert Pattern and select the appropriate schedule pattern for this employee.
6. Click **OK**.
7. The pattern will populate the schedule grid.

8. Click **OK**.
9. Returns to Schedule Editor. You should see the schedule pattern in the grid for that employee.
10. Click **Save**.
How To Approve Overtime

1. Log on as Manager with UserID and Password and select “exceptions” to view employees with OT to be approved.
2. Select appropriate employee and view timecard.
3. Click on the last day of the week in which overtime was earned (typically will be Friday)
4. Select “Approvals” tab at top of timesheet, select “Approve Overtime”, then select “All” if approving all OT, or “Some” and indicate the hours you wish to approve. Click “OK”, then SAVE.

5. Once saved pay code will change from “Unapproved OT” to “Comp Time OT” only for those employees eligible for comp time.
6. For students, temps and casual employees, Unapproved OT will become Overtime and it will be paid on the next payroll.
How To Pay Out Overtime

Hours worked over 40 automatically go to Comp Time OT and are added to the employee’s comp bucket. If you wish to pay these hours as Overtime, you must move them from Comp Time OT to Overtime.

1. Select employee Timecard and click on Comp Time OT at bottom of screen under Totals & Schedule tab, right click on mouse and select “move”.

2. In the “To” selection of pop-up box, select pay code “Overtime” and enter amount of hours to move.
3. Effective Date should be the last day of the week you are paying out.
4. Click Comment if you’d like to add a comment.
5. Click “OK”.

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6. After saving, Comp Time OT will reflect 0 balance and Overtime will reflect the amount of hours entered.

How to Approve a Time Card

- Log on to Kronos with your PirateID and password
- Select Timecard Approval Task List and bring it to the center of your screen.
- The screen below will appear.
- Ensure that all exceptions have been taken care of
- If you would like to review an individual timecard for discrepancies highlighting the employee name and then selecting the View Details button in the bottom left corner

- Select View Timecard
Once you are done reviewing the time card select the **Exceptions Details** back button and then **Summary** back button. This will take you back to the approval screen.

You can now highlight one or all employees to approve their timecard. Note: Do not select yourself!
- Go to the **Approvals** tab
- Select **Approve**
• Select Yes
• Select the Next button

• Select the Next button
- Select **Done**
- This completes the approval process!
How to Run a Report as a Manager

Select **Reporting or Editing Manager Links** or **Manager Links** and bring it to the center of your screen

- Select **Reports**
- The screen below will appear

- This will show you a list of all the reports you can run
- To view all the reports available in a specific Category select the Plus sign located to the left of the Name
- Select the report you would like to run (ie: Accrual Balances and Projections)

- Now you need to select who you want to run the report for
• Now select a time period (ie: current time period or a specific date)

• Now you need to select your report options

• Select the Set Options tab
• Once you have selected our options, select the **Run Reports** tab
• Select the **Refresh Status** tab until the **Status column** indicates **Complete**

- Highlight the report you would like to open and select **View Report**
How to Designate a Delegate

1. Drag the Delegate Management widget to the center of your workspace.
2. Click on Actions.

3. Click on Delegate Manager

4. If you already have a Delegate, a Select Action box will appear. See instructions in next section for removing a Delegate. To create a new Delegate, select Create New Delegation and click Next.
6. If you do not have an existing Delegate, or if you selected **Create New Delegation** from the box above, the **Create Delegation** box will appear.

![Create Delegation - Windows Internet Explorer](image)

7. Any previously defined Delegates will appear in the **Existing Delegations** box.
8. Under **New Delegation**, Select your Delegate from the list of people in the **Delegate** dropdown box. This list will contain anyone with a Kronos Manager’s License in your College or Sr Admin area.
9. Enter the **Start Date**. This is the date you want the Delegate to begin acting on your behalf.
10. Enter the **End Date**. This is the last date you want your Delegate to be able to act on your behalf. This can be a few days or several years into the future. This date is required.
11. Choose the appropriate role. If you are a preliminary approver and you Approve timecards, select **Approver Manager**. If you are the Sign Off Manager and you Sign Off timecards, select **Sign Off Manager**. Your Delegate will only be able to access functions setup under this role and not necessarily everything you can do.
12. Click on Save and Close.

13. Your Delegate will receive an e-mail with the following text.

   From: yourname@ecu.edu [mailto:yourname@ecu.edu]
   Sent: Monday, January 23, 2012 2:28 PM
   To: Patty Pirate
   Subject: Delegation request for Your Name

   You have received a delegation request for Your Name

   Delegation Details:
   Delegator: Your Name
   Start Date: 2/01/2012
   End Date: 2/29/2012
   Role: Sign Off Manager

14. Your Delegate must login to Kronos to Accept or Reject your request.

15. You will receive e-mail notification when they have completed the request. The e-mail will indicate whether they accepted or rejected your request.
How to Remove a Delegate

1. Drag the Delegate Management widget to the center of your workspace.
2. Click on Actions.

3. Click on Delegate Manager

4. To remove an existing Delegate, Click on Remove Existing Delegation and click Next.
5. Click **Delete** to remove the highlighted Delegate.
6. If you remove a Delegate before the original End Date, your Delegate will receive an email notification with the following text:

   From: yourname@ecu.edu [mailto:yourname@ecu.edu]
   Sent: Monday, January 23, 2012 2:28 PM
   To: Patty Pirate
   Subject: Delegation deleted for Your Name

   The delegation for Your Name has been deleted.

   Delegation Details:
   Delegator: Your Name
   Start Date: 2/01/2012
   End Date: 2/29/2012
   Role: Sign Off Manager
How to Accept or Reject a Delegate Request

1. Drag the Delegate Management widget to the center of your workspace.

2. Click on Inbox.

3. TASKS should be selected. Any requests for Delegate will be listed under TASKS. Note: MESSAGES will list the same e-mail notification you received via Outlook. It is not necessary to view MESSAGES other than for your own information.

4. Your TASK list will default to Active requests. If you want to see older requests, you may select All from the Status dropdown.

5. Double Click on the request.
6. To accept, select **Accept Delegation**. Type a **Comment**, if you like.
7. Click on **Save & Close**.
8. The requesting manager will receive an e-mail with the following text:

```
From: piratep@ecu.edu [mailto:piratep@ecu.edu]
Sent: Tuesday, January 24, 2012 10:01 AM
To: Manager Name
Subject: Pirate, Patty has accepted the delegation request for Manager Name

Pirate, Patty has accepted the delegation request for Manager Name

Delegation Details:
Delegate: Pirate, Patty
Delegator: Manager Name
Start Date: 2/01/2012
End Date: 2/29/2012
Role: Delegate Approver
Comment: Sure. I’d be happy to help.
```

9. To decline, select **Decline Delegation**. Type a **Comment**, if you like.
10. Click on **Save & Close**.
11. The requesting manager will receive an e-mail with the following text:
From: piratep@ecu.edu [mailto:piratep@ecu.edu]
Sent: Tuesday, January 24, 2012 10:01 AM
To: Manager Name
Subject: Pirate, Patty has rejected the delegation request for Manager Name

Pirate, Patty has rejected the delegation request for Manager Name

Delegation Details:
Delegate: Pirate, Patty
Delegator: Manager Name
Start Date: 2/01/2012
End Date: 2/29/2012
Role: Sign Off Manager
Comment: Sorry. I'm out of the office then.
How to Act as a Delegate

1. Drag the **Delegate Management** widget to the center of your workspace.

2. Click on **Kronos Classic View**. Maximize your screen and log in again.

3. Usually, when logging into Kronos as a manager, you use the Next Generation User Interface or NGUI. NGUI does not include Delegate functionality so, when acting as a Delegate, you will use Kronos Classic View. The information is the same. It is just organized differently.

4. Click on **Switch Role: Myself** at the top of the screen.
5. Select the line with the Manager’s Name…the one that is not Myself and click on Switch Role. Now the role displayed at the top of the page should be that of the Manager for whom you are acting.

6. When you view reports or employee data views (Genies) as the Manager, you will see only the employees the Manager can access.

7. To access Timekeeping information for the employees the Manager usually approves or signs off, click on Timekeeping. All Timekeeping related employee data views(Genies) are listed here.

8. ECU Pay Period End Data and ECU Approvals Summary should give you the information you need to complete the approval or sign off task for the Manager.

9. QuickFind, ECU Accrual Balances and other Genies can be found under My Genies.

10. Click on Log Off in the upper right hand corner when you are finished.
Historical Edit

Historical Edit is used to record hours that were missed or incorrectly recorded on a previous timecard. This also includes adjustments to leave taken (positive and negative) in previous pay periods. The pay period in which the historical edit occurs must have been signed off.

From the Employee’s Timecard, Choose Current Pay Period

Select the Amount Tab and Add Historical
This box will appear, complete as follows:

- **Historical Date**: the date in the past on which you need to make the addition or adjustment.
- **Pay Code**: Select the appropriate Pay Code
- **Amount**: number of hours (negative if removing hours incorrectly recorded to the timecard)
- **Transfer**: Leave this blank This represents the position to which the hours were charged but we would not use this.
• Effective Date: Date within the Current Pay Period to which the adjustment will be recorded. If in doubt, use the last day of the pay period.

• Be sure to check the Include in Totals for Effective date, this ensures time will be extracted and included in the current pay period

• Be sure to check Impact Accruals

Add comments. Use the comment code Historical Edit to a Previous Pay Period and add Notes explaining the need for the adjustment.

Once all the information is completed, click OK

A Historical Amounts Tab will now appear at the bottom of the Current Pay Period Time Card.
Click on the Historical Amounts Tab to view your results

Click Save in the upper left hand corner.

Note: The hours recorded on the timecard under Totals & Schedule should now reflect the historical amount that is to be paid when this pay period is processed.

Reminder: The historical amount tab will not appear unless something is recorded under it.

**To Delete A Historical Edit**

From the Employees Timecard, Choose Current Pay Period

Select the Amount Tab & Delete Historical
Confirm Delete

Save and the historical edit has been removed.
### Manager Links

#### TIMECARD

**Last Saved:** 3:55PM

**Name & ID:** first.last [ID: 00000123]

**Time Period:** Current Pay Period

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#### TOTALS & SCHEDULE

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How to Pay Out Balance for Vacation or Bonus Vacation

- Go to the Employee’s Timecard.
- Pull up the Current or Previous Pay Period – whichever contains the employees last paid date. Do not use Range of Dates...be sure to use Current or Previous Pay Period.
- Be sure any Vacation or Bonus Vacation hours taken between now and the end of the month have been entered on the timecard before you get the balance.
- Vacation balances are updated on the last day of every month. To get the most up to date balance, you must always click on the last day of the month and then go the Accruals tab to get the correct balance to pay out. Use the balance in the Projected Balance column.
- If the Vacation balance is over 240 hours, the amount to pay out can only be 240. If the employee is less than 100% full time, the maximum to payout is 240 x FTE. For example, a .50 FTE would be eligible for a maximum pay out of 120 hours.
- Bonus Vacation pay out should be whatever the Projected Balance column says.
- Open the pay period that contains the last day for which the employee has any type of hours on their timecard. Click on the last day of that pay period.
- Click on insert row icon
- Select Vacation Payout or Bonus Vacation Payout from the Pay Code dropdown list.
- Click on that new row in the cell for the last day of the pay period and enter the number of hours to pay.

Vacation Payout and Bonus Vacation Payout Pay Codes will reduce the balance in the Vacation and Bonus Vacation Accrual buckets, respectively, by the number of hours entered.

The hours entered will be included in the interface to Banner and will be included on the NEXT payroll. Pay out hours entered on the 15th will be paid at the end of the month. Pay out hours entered on the last day of the month will be paid on the 15th of the following month.
How to Pay Out Accrual Balance for Comp Payout or Comp OT Payout

When Comp time is not used in 12 months it expires and must be paid out. When Comp time expires, Kronos will automatically move the hours into one of two Payout buckets. Kronos knows whether the Comp time was earned at hour for hour straight time or if it was earned in lieu of OT. If earned as hour for hour straight time, expired hours go into the Comp Payout bucket. If Comp was earned in lieu of OT, expired hours go into the Comp OT Payout bucket.

If there is a need to payout Comp Time that has not yet expired, the hours must first be manually moved from the Comp bucket to the Comp Payout or Comp OT Payout bucket. Instructions for that step follow the payout instructions.

**Comp Payout Process for hours that are already in the Comp Payout/ Comp OT Payout bucket:**

1. Open the ECU Comp or Comp OT Payout Genie from Manager Links.

2. This Genie will use a default hyperfind, ECU Comp or Comp OT Payout, to show only employees with a balance in either their Comp Payout or Comp OT Payout accrual buckets. Note: All accrual buckets for the selected employees will display.

3. Select the appropriate time period. This Genie will default to the Previous Pay Period. NOTE: Accrual Payouts must be performed in a non-signed-off Pay Period.

4. Click at the top of the Accrual column to sort results in order of accrual bucket name.
5. You must complete the process for one code at a time.
6. Highlight the name(s) of all employee(s) with a balance in **Comp OT Payout** (Hold CTRL key to select multiple names).
7. With names still highlighted, select the **Accruals** tab

8. Choose **Payout**.
9. From the drop down menu choose **Comp OT Payout** (the pay code has the same name as the accrual bucket).
10. For Effective Date, enter the last day of the Pay Period. NOTE: Accrual Payouts must be performed in a non-signed-off Pay Period.
11. Click **OK**.
12. Repeat steps 9 thru 11 for accrual code **Comp Payout**.

**To Confirm the Payout (this is an important step):**

1. Select **Group Edit results** (under Manager Links in NGUI or General tab in classic)

![Manager Links](image)

2. It will provide you with a list of Total edits, Total successes, and Total failed

![Group Edit Results](image)

3. The Details link of any failure explains why the Payout failed
4. Correct as needed
5. A Pay Code edit will appear in the employees’ timecard for the date entered. Details will also appear on the Moved Amounts tab.
Note: It is also possible to payout Comp Payout from the employee’s timecard by simply entering a Pay Code edit using the Comp OT Payout or Comp Payout pay code on the last day of the pay period. This option might be used if there is only one to do or if you are already on the employee’s timecard and want to complete the Comp payout.

**Comp Payout/Comp OT Payout Process for hours that are NOT already in the Comp Payout/Comp OT Payout bucket:**

When Comp Time has not yet expired but needs to be paid out, as in a transfer or termination, you must first move the time from the Comp bucket to the Comp Payout or Comp OT Payout bucket. You will use a report to determine how much to pay out as Comp Payout and how much to pay out as Comp OT Payout.

1. Go to the Employee’s Timecard.
2. Pull up the Current or Previous Pay Period – whichever contains the employees last day. Do not use Range of Dates...be sure to use Current or Previous Pay Period.
3. Be sure any Comp hours taken between now and the end of the pay period have been entered on the timecard before you get the balance.
4. To get the most up to date balance, you must always click on the last day of the pay period and then go the Accruals tab to get the correct balance to pay out. Use the balance in the Projected Balance column.
5. Carefully view the row for Comp Time and confirm the appropriate balance to move.

6. Right Click on **Comp Time** and select MOVE and the Move Accrual Amount box will appear.
7. Comp Time should appear as the Accrual Code in the From section.
8. In the To section, select Comp Payout for **Accrual Code**.
9. Enter the number of hours to be paid out for **Amount**.
10. Enter the last day of the pay period for **Effective Date**.

11. Click on **OK**.
12. Save the timecard.
13. Click on the last day of the pay period and Click on the Accruals tab.
14. Now you should see that Comp Time is zero and Comp Payout has the number of hours you moved.

Once hours have been moved into the appropriate accrual bucket, you may use the previous instructions to complete the payout process (Comp Payout Process for hours that are already in the Comp Payout/Comp OT Payout bucket).
How to Adjust Leave Balances

1. Log on as Manager and select Quickfind option under Manager Links. Type in name or ID of employee you wish to adjust then hit “find”. Click on appropriate employee just to highlight their row. Then select “Accruals” tab, and “update” (Note- you will never select “reset” option, only “update”).

2. Select appropriate accruals code from drop down, indicate hours to add to existing balance (use negative if you need to decrease balance), and select effective date in which you wish to update. Click ok.
3. To view updated balance, go to employee’s timecard, hit “refresh”, click on the effective date in which you made the change, then click accruals tab to verify updated balance. If balance does not reflect change, try to “refresh” again.
How to Perform a FOAPAL Transfer on Timecard in NGUI

1. There are times when it is necessary to record an individual’s pay against a different Fund, Organization Code, Account and Program from the job defaults in Banner. It may even be necessary to add or change an Activity Code. This is achieved with a Transfer in Kronos.

2. In the first example we do a FOAPAL transfer on the Timecard in NGUI. We will start with the Timecard with existing data and add the “On Call SPA” Pay Code on 10/29 and indicate which FOAPAL to use for the payment using the Transfer column in the Timecard.

3. The Transfer must follow a standard format in order to be valid in translation to Banner. In this example we will not be changing the Position or Job Suffix for the payment. Kronos will default the primary job in any case where that data is omitted in the Transfer. All filler values and dashes are necessary.

4. The (x) preceding the Account data in the Totals & Schedule area indicate that this row is the result of a Transfer entry.

Format = ://////FUND-ORGN-ACCT-PROG-ACTV-

Example 1: ://////111180-25-60244-0000-254360-

for On Call SPA
### Manager Links

**Back to Manager Links**

#### TIMECARD

**Last Saved:** 2:31 PM  
**Home & ID:**  
**Time Period:** Last Week

<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>
<th>Transfer</th>
<th>Out</th>
<th>Shift</th>
<th>Daily</th>
<th>Cumulative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun 1/3/23</td>
<td></td>
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<td></td>
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<tr>
<td>Mon 1/2/23</td>
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<tr>
<td>Tue 1/2/23</td>
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<tr>
<td>Wed 1/3/23</td>
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<td>Thu 1/4/23</td>
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<tr>
<td>Fri 1/5/23</td>
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</tr>
<tr>
<td>Sat 1/6/23</td>
<td>On Call SPA</td>
<td>24:00</td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

#### TOTALS & SCHEDULE

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Pay Code</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun 1/3/23</td>
<td>8:00 AM</td>
<td>5:30 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mon 1/2/23</td>
<td>8:00 AM</td>
<td>5:30 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tue 1/3/23</td>
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<td>5:30 PM</td>
<td></td>
<td></td>
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<tr>
<td>Wed 1/3/23</td>
<td>8:00 AM</td>
<td>5:30 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thu 1/4/23</td>
<td>8:00 AM</td>
<td>5:30 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 1/5/23</td>
<td>8:00 AM</td>
<td>5:30 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sat 1/6/23</td>
<td>8:00 AM</td>
<td>5:30 PM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Example 2: ://////111180-25-60244-0000-254360-

for Call Back Pay

1. In this example we need to Transfer Callback pay to a different FOAPAL. Since the Callback is recorded in the Timecard with a Work Rule Transfer we will need to record the FOAPAL transfer using a different method.

2. In this case we will use the Move feature in the Totals & Schedule Area of the Timecard. This is done by Right-clicking on the Account to Move in the Totals & Schedule Area.

3. The format of the data needed in the Transfer box will be identical using this method.
### Move Amount

**From**

- **Pay Code:** Call Bc3i Pay
- **Amount (hh:mm):** 2:00
- **Transfer:** Sat 0508

**To**

- **Pay Code:**
  - **Call Back Pay**
- **Amount (hh:mm):** 2:00
- **Effective Date:** 1/29/2011
- **Transfer:** 2/5/25/2590/25/25430/25/25430

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**Kronos Managers Manual**

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How to Perform a FOAPAL Transfer on Timecard in Classic View

5. There are times when it is necessary to record an individual’s pay against a different Fund, Organization Code, Account and Program from the job defaults in Banner. It may even be necessary to add or change an Activity Code. This is achieved with a Transfer in Kronos.

6. In the first example we do a FOAPAL transfer on the Timecard in Classic View. We will start with the Timecard with existing data and add the “On Call SPA” Pay Code on 10/29 and indicate which FOAPAL to use for the payment using the Transfer column in the Timecard.

7. The Transfer must follow a standard format in order to be valid in translation to Banner. In this example we will not be changing the Position or Job Suffix for the payment. Kronos will default the primary job in any case where that data is omitted in the Transfer. All filler values and dashes are necessary.

8. The (x) preceding the Account data in the Totals & Schedule area indicate that this row is the result of a Transfer entry.

**Format =** :\\\\FUND-ORGN-ACCT-PROG-ACTV-

**Example 1:** :\\\\111180-25-60244-0000-254360-

for On Call SPA
Example 2: `///111180-25-60244-0000-254360-` for Call Back Pay

4. In this example we need to Transfer Callback pay to a different FOAPAL. Since the Callback is recorded in the Timecard with a Work Rule Transfer we will need to record the FOAPAL transfer using a different method.

5. In this case we will use the Move feature in the Totals & Schedule Area of the Timecard. This is done by Right-clicking on the Account to Move in the Totals & Schedule Area.

6. The format of the data needed in the Transfer box will be identical using this method.
### Kronos Managers Manual

**TIME CARD**

#### Total & Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Pay Code</th>
<th>Account</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/10/23</td>
<td>06:00AM</td>
<td>05:00PM</td>
<td>CallBack</td>
<td>000-000-000-000</td>
<td>2:00</td>
</tr>
<tr>
<td>01/10/23</td>
<td>09:00AM</td>
<td>08:00AM</td>
<td>On Call</td>
<td>111-111-111-111</td>
<td>2:00</td>
</tr>
<tr>
<td>01/10/23</td>
<td>07:00AM</td>
<td>06:00AM</td>
<td>CallBack</td>
<td>000-000-000-000</td>
<td>2:00</td>
</tr>
<tr>
<td>01/10/23</td>
<td>08:00AM</td>
<td>07:00AM</td>
<td>CallBack</td>
<td>000-000-000-000</td>
<td>2:00</td>
</tr>
</tbody>
</table>

#### Totals & Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Pay Code</th>
<th>Account</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/10/23</td>
<td></td>
<td></td>
<td>2:00</td>
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<tr>
<td>01/10/23</td>
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<tr>
<td>01/10/23</td>
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<td>2:00</td>
</tr>
</tbody>
</table>

#### Approval & Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Pay Code</th>
<th>Account</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/10/23</td>
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<td>2:00</td>
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<tr>
<td>01/10/23</td>
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<td>01/10/23</td>
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<td>2:00</td>
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<tr>
<td>01/10/23</td>
<td></td>
<td></td>
<td>2:00</td>
</tr>
</tbody>
</table>

#### Comments

- 01/10/23: Regular
- 01/10/23: On Call
- 01/10/23: CallBack
Scheduling Tools

All Managers have the ability to schedule employees using existing Shifts, Patterns and Schedule Groups. Only Managers with access to Scheduling Tools can create new Shifts, Patterns and Groups.

Shift Templates

A shift template is a shift with a name that you can assign to employees and groups over and over again. The template contains all the shift attributes, like start time and end time and lunch length, so when you assign a schedule using a shift template, you do not have to re-enter details for the shift. Managers use shift templates to reduce repetition when scheduling the same shift multiple times and also to reduce input errors. For example, most employees in your department work from 8am to 5pm. You can create a shift template that contains the start time, end time, and lunch break, then assign this shift template to existing and new employees. We have already created many Shift Templates but you may need to add any that are unique to your department.

Creating Shift Templates

1. **Access Setup > Scheduler Setup group > Shift Templates.** Shift template editor opens already in ADD mode, displaying a list of shift templates that currently exist in the application.
2. Click **New** or **Duplicate** (to copy an existing Shift Template and change it to make a new one).
3. Enter an appropriate name in the **Name** field. This will appear as the shift label in the Schedule Editor. Please follow the same format as that of other Shift Templates. The Name should indicate the shift, in 24 hour format, with the length of the lunch break (ex. 0800-1700 60L).
4. Enter an appropriate **Description** up to 250 characters in the description field. Follow the same format as the description of other Shift Templates. The description indicates the shift in 12 hour time with the lunch break (ex. 8a-5p 60 min Lunch).
5. Select the appropriate segment type from the predefined shift segment types in the drop down list:
   - Regular – Work time charged to the home account
   - Break – Non working time
   - Transfer – Time in a different work rule, labor account, or both
   - Off – Time associated with a work rule, such as when employees are scheduled to be off. However, if they come to work, there are pay consequences; for example, if they are on call. The system does not generate an error if the employee does not punch in. In the schedule area of the timecard, an off day is indicated by (o) after the date.
   - Unavailable – The specified time cannot be worked (not valid in a pattern)
6. **Day** start- enter the day on which the shift or shift segment starts (1 is the default).
7. **Start Time** – enter the start time of the shift or shift segment. The default is a.m., and if you enter 7, the system automatically enters a.m. For a p.m. time, enter p; for example, 7p. You do not need to enter a colon. For example, you can enter 730 for 7:30 a.m.
8. **Day** end - Specify the end day of the shift or shift segment: 1 if the shift or segment ends on the same day it began; 2 if the shift or segment crosses midnight and ends on the second day.
9. **End time** – Specify the end time of the shift or shift segment.

10. **Sch Hrs** – Calculates the total number of scheduled hours in the segment.

11. **Transfer** – Enter a combination of a labor account transfer, a job transfer, or work rule transfer for the shift or shift segment. Select a value from the drop-down list, which contains the most recently used values, or type one or more values, or select Search to choose a value from the Select Transfer dialog box. **Note** that a transfer is not valid for types Break or Off. Transfers are indicated by an (x) after the shift label or shift times in the schedule.

12. To add a new row, click the **Add Row** button and repeat step 4 to step 5. You will need to enter a new line for any shift that includes a lunch break.

13. Click **Save**.

---

**Pattern Templates**

A pattern template is a group of common shifts or pay codes that repeat over time. For example, a shift of 8:00am to 5:00pm might repeat in a pattern from Monday through Friday. Managers use pattern templates to save data entry time and to reduce typing errors when creating employee schedules. Pattern Templates should be used if there are established rotations, or patterns, to which employees are or when more than one employee works the same schedule.

**Creating Pattern Templates**

1. From Setup, select **Scheduler Setup > Pattern Template**.
2. Click **New** or **Duplicate** (to copy an existing Pattern Template and change it to make a new one).
3. Enter a **Name** (up to 30 characters) and **Description** (up to 250 characters). Please follow the format of other Pattern Templates. The Name and Description should provide enough information that other managers will understand the shift, the days it falls on, and the pattern that repeats, if applicable, when scheduling their employees.
4. In the **Recurring** box, specify the number of days or weeks in the pattern: up to 52 weeks or 365 days. This value controls the cells that you can work with in the selection grid.
5. Select **Weeks** or **Days** as the interval unit associated with the number you selected in the Recurring box. This value, combined with the Recurring value, dictates the cells that you can work with in the selection grid.
6. Create the pattern for the template in one of the following ways:
• **To copy** a shift from one cell to another, click the cell that contains the shift, right-click, and select **Copy** from the shortcut menu. To paste the shift, click the destination cell, right-click, and select **Paste**.

• **Enter shifts manually**: Click in a day cell and type the shift start time and end time using the format 7-3p or 7:00 a.m. - 3:00 p.m.

• **Insert shifts using Insert Shift or the Shift Editor**: Select the cells that will contain the same shift. To select more than one cell, press and hold Ctrl and click in the cells. Enter shifts into the selected cells using either of the following methods:
  1. Click **Insert Shift** and select a shift from the list; then click **OK**.
  2. Click **Shift Editor** and create a shift in the Shift Editor.

• **Delete**: Click to delete the selected item or items.

  7. Repeat step 4 until you have added all shifts in the week rotation.

  8. Click **Save**.

*Note*: Editing or deleting a pattern template does not affect already created schedules for current and future time periods. Edits apply only to schedules you create using the modified template.

### Schedule Groups

When a number of employees share the same schedule, you can create an inheritance group to identify them. The group must be created and a pattern must be assigned to it before adding employees to it. Once the group is created and a pattern is attached, you can add employees to it. You can then assign the same shift, pattern or pay code edit to all group members simultaneously by scheduling on the GROUP line. Groups are generally used when a specific group of employees share the same schedule and when changes to that schedule would apply to everyone in the group.

#### Creating Schedule Groups

1. **Setup > Scheduler Setup group > Schedule Group.** A list of any existing schedule groups appear
2. **Click New.** Schedule Group editor appears in add mode.
3. **Name** the group. The name of the group should say more about the people in it than what schedule they work. For example, a group of HR Analysts all work the same schedule. Anytime the schedule changes, it applies to everyone in the group. The name of the group can be HR Analysts. **Recommended practice**: If this is an inheritance group use the naming convention of adding a “-i” to the end of the group name. This will make the group easily identifiable as an
inheritance group later when you are ready to assign individuals to the group. Inheritance means that employees in the group will *inherit* any changes made to the schedule.

4. **Check (v) the Allow Schedule Inheritance box.** If you fail to do so initially and have saved your work, you’ll have to delete the group and start over. Edit will not allow you to check (v) the box, only modify the schedule group name.

5. **Click Save and Return.** Returns to the list of existing schedule groups name. Verify the newly created group appears and is identified as an inheritance group if applicable.

**Adding a Pattern to the group (if you assign employees to a schedule group before adding a pattern, the employees will still not have a schedule)**

1. Open Schedule Editor
2. Select Current Schedule Period for Time Period
3. Click on the By Group tab
4. Select Group from the Menu across the top
5. Choose Load Group from the dropdown menu

6. Choose your group from the dropdown menu

7. Click OK
8. While still on the By Group tab of Schedule Editor, scroll down to the bottom of the page and you will see your new group.

9. Right Click on the group and select Add Pattern from the dropdown box

10. Select Shift or Pay Code
11. **First,** click on a day of the week and click the Insert Pattern button.
12. Select the appropriate pattern from the list.
13. Enter **Work Start Date** – this is the first day this schedule should start for this group. This will usually be the beginning of a week. This day cannot be earlier than the Time Period selected in Schedule Editor but you can go back and change the Time Period, if necessary.

14. Enter **Pattern Start Date** – this is the date on which the first day in the pattern begins (even if blank). It is frequently the same as the Work Start Date but it might be different, especially if the pattern has multiple weeks or if the schedule begins in the middle of a week the first time. In the example below, the Work Start Date is 3/1, which was a Thursday, and that is the day this schedule should begin for the group. So the Pattern Start Date is Sunday 2/26. On 3/1, employees added to this group will have a schedule of 730-5p, the appropriate Thursday schedule.
Pay Code Edit

There are times when you need to add time or money to a timecard by doing a Pay Code Edit. You may need to add a Sick or Vacation day or you may need to add Shift Pay to an Exempt employee, etc.

- From the Employee’s Timecard, select the Current Pay Period.
- Go to the day on which you need to add time and click on the icon to add a new row.
- On the new row, Click on the drop down arrow and select the appropriate Pay Code from the list.
- In the Amount column, enter the appropriate number of hours.
- SAVE.
- The amount you added will now appear under Totals & Schedule.
How to Move Hours Worked Over Part Time Schedule

When a part-time employee works over their scheduled weekly hours and needs to be paid out for those hours, it is necessary to move the hours into another pay code. This move should be performed (preferably) at the end of every week. This could also happen to a Full Time person during a holiday week.

Set the Time Period to a weekly range.

Under Totals and Schedules right click on Regular and select MOVE.

Move the appropriate number of Reg hours to the Hours Over Part Time Schedule pay code with an effective date of the Friday or Saturday at the end of the week you’re looking at.

Move only the hours that exceed the number of Reg hours for which the employee will be paid. For example, if the employee is paid for 32 hours and works 33, just move 1 hour.

Add a comment. There is a comment that says: Paid Hours Added for time worked over PT sched. Add any additional notes to explain.

Under Totals and Schedules there should now be a Hours Over Part Time Schedule Pay Code.