

Caltech

Payroll Services



Kronos Workforce Timekeeper User Guide for **Payroll Activity Monitor (PAM), Managers, Supervisors & Timecard Approvers**

Welcome to Caltech!

Kronos is a web-based time collection system used to manage timekeeping for campus employees.

This guide will show you the basic navigation to help report employee time, and prepare employee timecards for submission to payroll following Caltech policy.

In this guide, you will learn the basic functions of how to use your Kronos timecard, including:

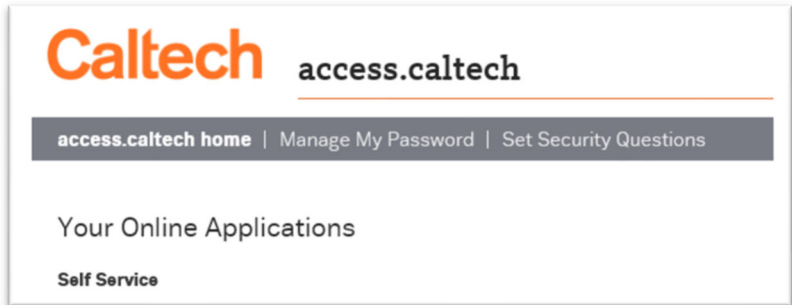
- **Signing In**
- **Signing Out**
- **Navigating the Navigator**
- **Navigating the Timecard**
- **Editing Timecards - Alerts & Notifications**
- **Editing Timecards – Hyperfind Queries**
- **Editing Timecards – Exempt Employees**
- **Editing Timecards – Performing Account Transfers**
- **Editing Timecards – Historical Corrections**
- **Approve and Sign-Off Timecards**
- **Using Reports**
- **Caltech Websites and Resources**

This guide will focus on the role of Managers, Supervisors, Timecard Approvers and Payroll Activity Monitors (PAMs). To review instructions for My Timecard/My Information, please see the User Guide for Overtime Eligible Employees or User Guide for Exempt Employees.


Please use your Caltech Access credentials when accessing Kronos.

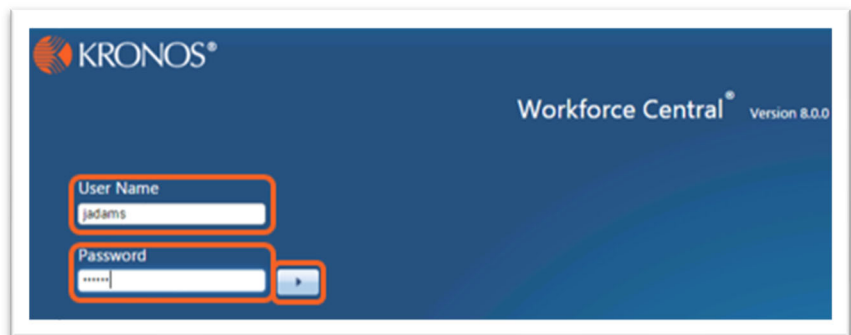
Signing In

Sign into Kronos via the Caltech Access page located at the following URL: <https://access.caltech.edu>
Kronos is located under your Online Applications > Self Service



Access the **Navigator** sign-on page

1. In the **User Name** field, enter your Caltech Access username
2. In the **Password** field, enter your Caltech Access password
3. Click the **right-facing arrow**  or press the Enter key on the keyboard. This will bring you to your Time Card



Signing Out

1. Click Sign Out from the upper right corner. You will be brought to the navigator sign-on page



As you navigate from page to page Kronos prompts you to save any unsaved changes, but best practice is to save frequently.

- Always end your work session by clicking the **Sign Out** link, located in the upper-right corner: Clicking **Close (x)** without first logging off might leave your connection to the application open, allowing unauthorized people to view and edit information.

Navigating the Navigator

The Kronos Navigator is a user interface that allows employees to access, view, and modify their time and labor data through a web browser. The Kronos Navigator is configured to reflect responsibilities and tasks based on the employee role. The Navigator below includes widgets (tools) which allow the user to perform various tasks. In this example, the PAM Navigator is shown.

The screenshot shows the Kronos Navigator interface. Callouts A through K point to the following elements:

- A**: Active Panel (top left navigation bar)
- B**: My Information tab (top left navigation bar)
- C**: Home Workspace (top left navigation bar)
- D**: Alerts/Notifications (top center notification icon)
- E**: Refresh (top center refresh icon)
- F**: Maximize / Minimize (restore) (top center maximize icon)
- G**: Gear Icon (top right settings icon)
- H**: Name / Sign Out (top right user profile and sign out link)
- I**: Primary Widget (bottom left status bar)
- J**: Secondary Widget (bottom center status bar)
- K**: Related Items Pane (right sidebar menu)
- L**: Genies drop-down menu (top left dropdown menu)

The main content area is divided into two panels. The left panel, titled "Genies", contains a table with the following data:

Name	Employee Approval	Manager Approval	Unreviewed Exceptions	Unexcused Absence	Totals Up To Date	Pay Rule
Bc		1	5		✓	Non-Exem...
Evi		1	14		✓	Non-Exem...
Wr		1	0	✓	✓	Exempt 20...
Ra		1	18		✓	Non-Exem...
Ki		1	0		✓	Exempt 20...

The right panel, titled "Timecard Approval", contains a form for "Select Pay Period for Approvals" with fields for "Time Period" (set to "Previous Pay Period") and "HyperFind" (set to "All Home"). A "Save" button is located below the form.

A - Active Panel

B - My Information tab

C - Home Workspace

D - Alerts/Notifications

E - Refresh

F - Maximize / Minimize (restore)

G - Gear Icon

H - Name / Sign Out

I - Primary Widget

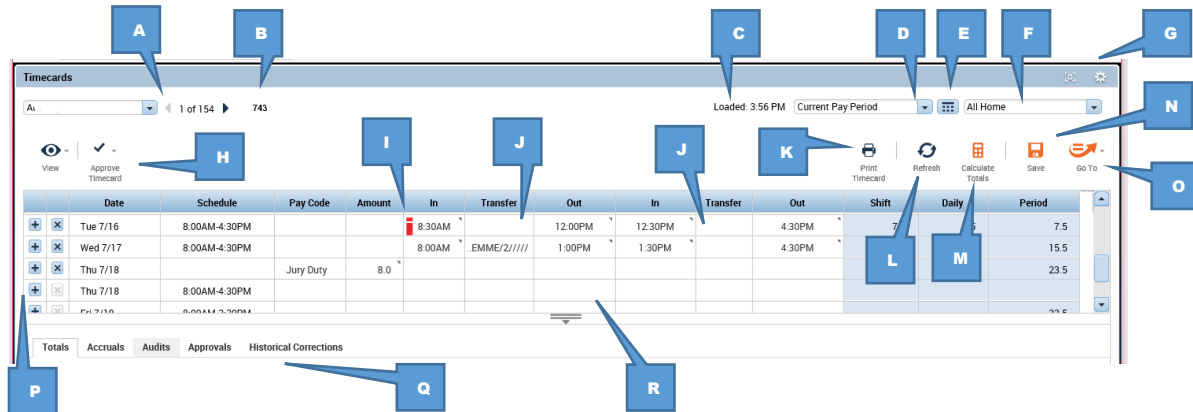
J - Secondary Widget

K - Related Items Pane

L - Genies drop-down menu

Navigating the Timecard

The Timecard widget allows users to view timecard entries. The timecard widget shows entries made during the period, the daily and weekly totals. Exceptions can be viewed and addressed here as well. This example shows the overtime-eligible timecard.



A - Timecard navigation Controls

- Click the down arrow next to the employee name to select the next employee
- Type employee names in the name selection field
- Click the right or left arrows to view the next employee timecard

B - Employee UID – UID for the employee timecard currently displayed

C - Timecard Last Saved

D - Time Period Drop-down list

E - Date Range Selection

F - Show Query - Drop-down list

G - Minimize/Maximize: Click to expand a widget or restore it to its original size.

Gear: Promote a secondary widget or close and return to Related Items pane

H - Approve Timecard: Use this to approve a timecard at the end of each pay period after reviewing and making any necessary edits. The approval can be removed to edit again, if the manager has not yet approved

I - Visual indicators: Alert you to items that need your attention. For example, a missed punch is indicated with a red line in the cell that needs to be addressed. Hover over the indicator icon to view the indicator details

J - Account Transfer: Also known as Labor Transfer cell, this is used to identify additional assignments other than the Primary assignment

K - Print Timecard: the Print function will include Tabs you have clicked. For example, if you wish to include sign-offs and reviews on the timecard copy, click on the Approvals tab, then select the Print icon. The Totals tab will appear by default.

L - Refresh: Click to refresh data after timecard changes. Refresh will return the timecard to the last saved entry

M - Calculate Totals: After making an entry, click Calculate Totals to see the impact of the entry on the timecard without saving the entry

N - Save: Click to save your changes. Note: when **orange**, this indicates a save is necessary

O - GoTo: Drop-down list. Takes user to Exceptions or Reports widget

P - Add/Delete a Row: Click to add a row to make additional entries, or delete all entries on a particular row

Q - Tab Section

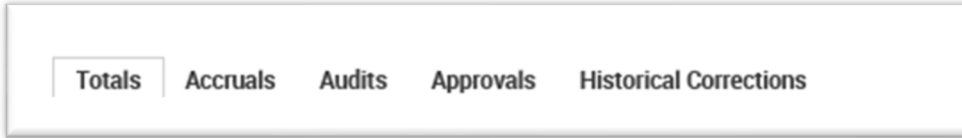
R - Editable Cells

Note:

- You can only make edits to the timecard when it is in the Primary widget position
- If Timecards is in the Related Items Pane, click the link and the widget will open in a new workspace

Tab Section

The Tab section displays five tabs; Totals, Accruals, Audits, Approvals, and Historical Corrections.



Totals

This section is a summary of the totals entered into the timecard for the period. The total hours will include paid leave hours and any other hours or entries entered on the timecard.

Accruals

Available paid leave balances will be viewable when selecting the Accruals tab. Vacation, sick and personal holiday accruals are updated weekly from Oracle.

Audits

This section provides an audit trail of all saved transactions (timecard edits, approvals, etc.) that have occurred during the selected pay period.

Approvals

Employee approvals, Manager Approvals, and Sign-offs by the Payroll Activity Monitor are shown here.

Historical Corrections

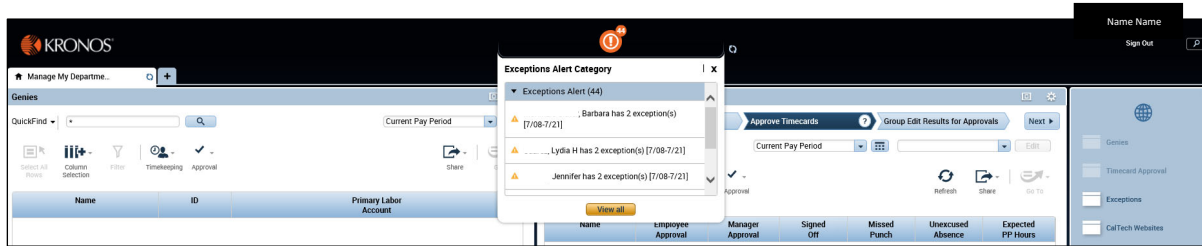
Historical corrections enable you to make changes in signed-off pay periods. You can make edits in a signed-off timecard just as you do in the current timecard. You can select any signed-off pay period and perform edits such as entering missed punches, or modifying vacation amounts. The system generates corrections, which are reflected in the previous and current pay periods.

Account	Amount	Comment	Edit Date	Effective Date	Historical Date	Include in Totals	Note	Pay Code
...1/NA/NA/NA/NA/NA	-1.0		6/18/2019 10:48...	6/18/2019	5/28/2019	Yes		Meal Premium
...1/NA/NA/NA/NA/NA	-0.5		6/18/2019 10:48...	6/18/2019	5/28/2019	Yes		Over time
...1/NA/NA/NA/NA/NA	-3.5		6/18/2019 10:48...	6/18/2019	5/28/2019	Yes		Hrly Wage

Editing Timecards – Alerts & Exceptions

Alerts and notifications are informational, time-sensitive messages generated by the system.

- **Exceptions:** identifies the number of employees with timecard exceptions. Clicking on the alert will open the Exceptions widget
- **Request Manager:** Notifies the manager of any employee request. Clicking on the alert will open the Request Manager widget (*this feature coming soon*)
- **Time-Off Request:** Notifies the manager of a time-off request made by My Requests. Clicking on the alert will open the Time-Off Request widget (*this feature coming soon*)



The Alerts feature allows access to exception notifications quickly and easily.

- Hover over the alert and notice that it changes to red. Click the alert and a drop-down list appears showing some of the alerts available.
 - Click one of the alerts: You are taken to the Exceptions widget showing just that one exception where you can drill down to the time card to view and resolve all exceptions for this employee.
 - Click the View All button: You are taken to the Alerts and Notifications Widget showing all available Alerts. You can then click any one of the alerts to view and resolve all exceptions for the employee

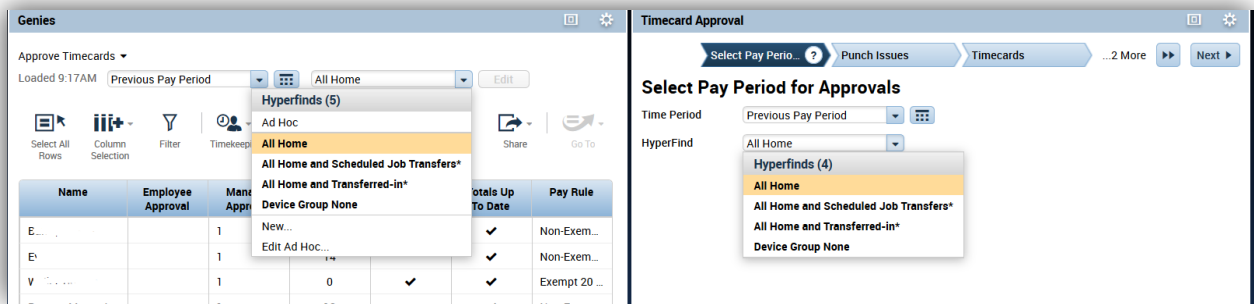
Users will see Alerts for all employees assigned to groups in which the user is assigned access rights. Use hyperfind queries to filter smaller groups of employees for reviewing, editing and running reports.

Editing Timecards – Using HyperFind Queries

Hyperfind queries allow the user to filter data. The default filter in most genies and widgets is All Home, which includes all employees whose primary assignment is within your access group. All Home and Transferred in will include employees who have assigned hours to an assignment within your access group. Other queries can be built to meet your needs:

- Queries can filter groups of employees;
 - my direct reports
 - student workers
 - building A workers
- Queries can filter hours to help you review payroll;
 - Timecards with greater than 10 hours overtime
 - Timecards with 0 hours
 - Timecards with no approval

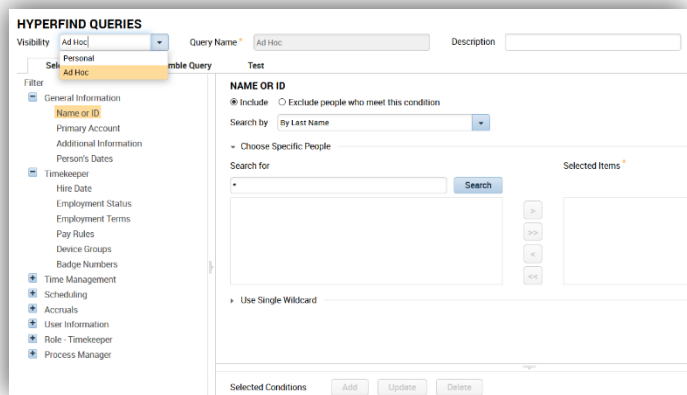
The hyperfind query can be applied on any genie, widget, or report where the Hyperfind or Show drop-down list appears.



You can also create your new queries as you determine you need them.

Queries can be saved as AdHoc (temporary) or Personal (seen only by me)

For more information on creating and using Hyperfind Queries see Kronos Help



Editing Timecards – Exempt Employees

Exempt employees should report all paid leave hours by the end of each pay period. Entries should be reported in full-day increments only. Exempt employees are not eligible for overtime compensation and are not required to report meal breaks.

Pay Code	Transfer	Mon 7/08	Tue 7/09	Wed 7/10	Thu 7/11	Fri 7/12	Sat 7/13	Sun 7/14	Total
Vac Pay		8.0							8.0
Please Choose									
Search			8:00AM-5:00PM	8:00AM-5:00PM	8:00AM-5:00PM				
Bereavement		8.0							8.0
Call Back									
Doubletime									
FMLA LWOP Emp									
FMLA LWOP Fam									
FMLASick Emp									
FMLASick Fam									
FMLAVac Emp									
FMLAVac Fam									
Daily Total			8:00AM-5:00PM	8:00AM-5:00PM	8:00AM-5:00PM				

Entering Paid Leave time:

- Click on the down arrow in the **Pay Code** cell, revealing the in-cell drop-down menu to view the list of leave paid leave codes.
- Select the appropriate code representing the reason for the absence.
- Click in the corresponding **Date** cell and enter the number of hours.
 - Entries should be reported in full-day increments only.

When entering multiple Pay Codes, a separate row must be added. In the example above, multiple days of vacation time were entered on the same row.

However a new line was added in order to use personal holiday for that week.

- To add a second row, just enter a pay code on the first row with the hours in the cell for that day, then click the **orange** Save button.
- A new row will appear, allowing you to enter a different pay code.

Editing Timecards – Overtime Eligible Employees

Overtime eligible employees should report all time worked and absences using appropriate pay codes on a daily basis. Timecards should not be completed in advance of hours worked.

To enter your time worked, go to Timecards. Click in the cell **In**. Enter the employee’s start time. In the example below, by entering the number “10” and tabbing to the next cell, Kronos understood the entry should be 10:00AM. In the last time entry, entering just the number “17” Kronos understood that as 5:00PM.

Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
Mon 7/08	8:00AM-...			10:00AM		12:00PM	12:30PM		5:00PM	6.5	6.5	€
Tue 7/09		Vac Pay	8.0								8.0	14
Tue 7/09	8:00AM-...											

Account	Pay Code	Amount
EV00/1/NA/NA/NA/NA/NA	Hrly Wage	6.5
EV00/1/NA/NA/NA/NA/NA	Total Pay for Period	14.5
EV00/1/NA/NA/NA/NA/NA	Vac Pay	8.0

On Monday, the employee came in late for his/her shift. Kronos alerts the user and timecard reviewer that the times entered do not match the employee’s schedule.

In order to record paid leave hours, enter the appropriate pay code from the drop down menu in the **Pay Code** cell for that day. Click in the corresponding cell in the Amount column and enter the number of hours. In the example above, the employee wants to take a full day of vacation. His/her scheduled workday is 8 hours, so 8 hours are entered in the **Amount** column.

If the employee wanted to take a partial day, the amount of paid leave used should be entered in the **Amount** column.

The **orange** Save button indicates information on the timecard must be saved.

Time Formats for Entries
 When entering time on the timecard, you can abbreviate times. For example, 7:00pm = 7p
 Time entered is accepted as morning ("am"), unless the user designates "pm" or uses military time; 7:30pm = 1930

Editing Timecards – Performing Account Transfers

By default, hours worked are applied to the employee’s primary job assignment. Days can be easily applied to an alternate assignment by using the ‘Transfer’ column.

Schedule	Pay Code	Amount	In	Transfer	Out
7:30AM-4:00PM			8:00AM	SD01/5/////	12:30PM
	Vac Pay	8.0		SD01/5/////	
7:30AM-4:00PM				EB00/4/////	
				BR00/3/////	
				AT02/2/////	
				Search...	
7:30AM-4:00PM			8:00AM		12:30PM

The most recently used transfers will show in the drop down menu. Additionally, multiple assignments can be entered per day, if worked.

Transfer

Labor Account SA00/////

Labor Account |

Add Labor Account Clear All

Department: SA00 - STUDENT AFFAIRS | X Not Used 5:

Assignment N... Not Used 6:

Direct Report: Smart search... Used 7:

Not Used 4: -

- 0000 Generated during...
- 1 Primary Assignment
- 2 Second Assignme...
- 3 Third Assignment
- 4 Fourth Assignment
- 5 Fifth Assignment

To select a new labor account not shown on the drop-down list, click in the Transfer column and select **Search**.

In the Transfer window select your alternate department from the drop down menu, then select the correct assignment number for this assignment.

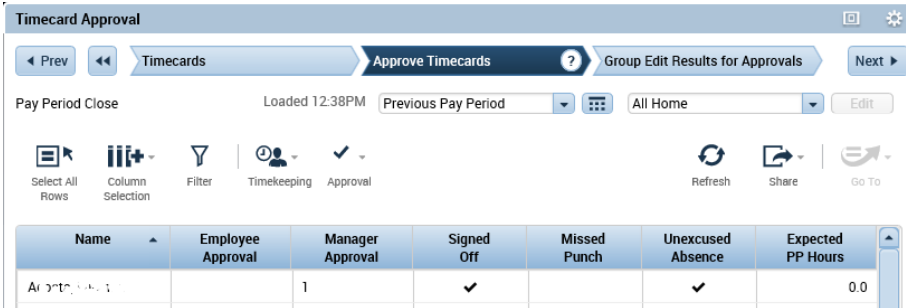
Click **Apply** when finished.

Editing Timecards – Historical Corrections

Historical corrections enable you to make changes in a signed-off pay period. You can make edits in a signed-off timecard just as you do in the current timecard. The system generates corrections, which are reflected in the previous and current pay periods. The following steps will guide you through the process of Historical Corrections.

Notes:

-Users must have access to Enable Edits in order to enter historical corrections.
 -Additional guidance can be found on **Kronos Help**.



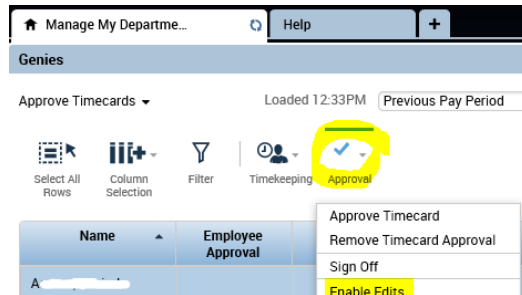
The prior period (correction date) must be in a signed-off period.

Enable Edits

On the **Approve Timecards** genie, select the employee name within the prior period.

Click the **Approve** drop-down list and select **Enable Edits**. Click **Yes** when asked to confirm.

Double click the employee name to open the timecard, or use the **GoTo** feature.



Edit timecard

After you have opened the timecard, you should see that the add/delete buttons are available. This indicates the timecard is open for edits. The cells are now grey, indicating the timecard has been signed off.

	Date	Schedule	Pay Code	Amount	In	Tr...	Out	In	Tr...	Out	Shift
+	Wed 6/26	8:00AM-4:30P...			8:00AM		12:00PM	12:30PM		4:30PM	8.0

In the example above, the original entry showed the out punch for Tuesday 6/26 as 4:30 pm. The employee notified the supervisor that she actually stayed an extra hour but forgot to enter it correctly.

To correct this, key over the Out entry with the correct time, 5:30 pm. Click **Calculate Totals** to see the impact of the entry and validate the entry is correct.

Editing Timecards – Historical Corrections (continued)

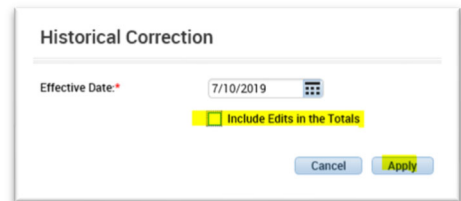
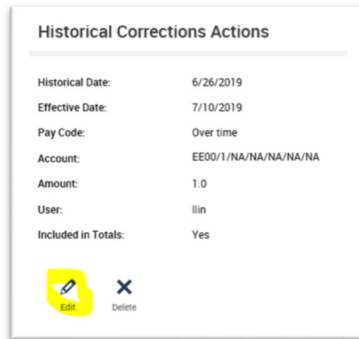
View pending corrections before saving

The default entry will include corrections in the next payroll processing. The example below shows this pending entry will be included in the next payroll processing (**Include in Totals = Yes**).

Date	Schedule	Pay Code	Amount	In	Tr...	Out	In	Tr...	Out	Shift	Daily	Period
Wed 6...	8:00AM-4:30P...			8:00AM		12:00PM	12:30PM		5:30PM	9.0	9.0	9.0

Account	Amount	Comment	Edit...	Effective Date	Historical D...	Include in Totals	No...	Pay Code	Pending	Person ID	P...	Type of Edit	User
...NA/NA/NA	1.0			7/10/2019	6/26/2019	Yes		Over time	✓	1137435	a	Correction	I...

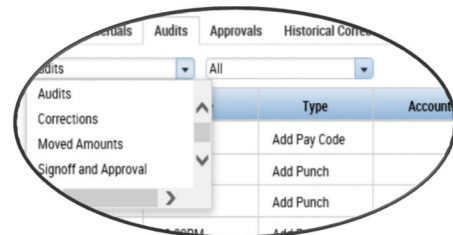
To indicate the hours were already paid, right-click on the entry in the Historical Correction tab, select **Edit**, deselect **Include in Totals** and **Save**.



Using the Audits tab

Various Tabs at the bottom of the timecard are useful in reviewing the timecard, and particularly reviewing historical corrections.

- Historical Corrections tab shows the historical transactions that have occurred during the period displayed. A detailed or summary view is available.
- Totals tab shows the hours that will be included for payment in the pay period shown. The Totals tab shows the adjusted total of the pay period. Historical Corrections generated will show in the Totals tab of the pay period of the effective date.
- Audits tab shows all transactions by category. Select the drop-down list to filter the category types to more easily view the transactions.




Remember to save after you have validated the entry!

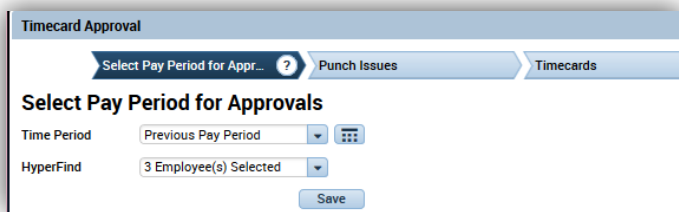
Approve and Sign-Off Timecards


Employees are asked to approve timecards by the end of the workweek. Once the timecard is approved by a Supervisor, Timecard Approver or PAM, the employee is no longer able to make edits.

Using the **Timecard Approval** widget, Kronos will guide users through the process of reviewing, editing and approving timecards. The widget remains in the last status position saved.

Navigate to the first step by clicking the left double arrow or the **Prev**  button to reveal Select Pay Period for Approvals.

Using the maximize  button, open the **Timecard Approval** widget to maximize the workspace.

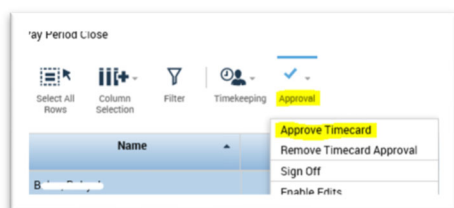
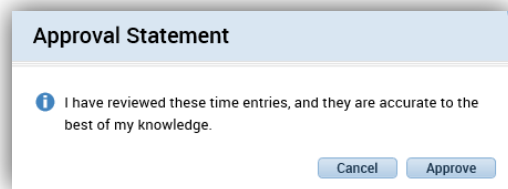


At the first chevron **Select Pay Period for Approvals**  select the appropriate pay period. Next, choose the HyperFind query which works best for you. The All Home query will include all employees to which you have access.

Click **Save**, then click **Next**. This will take you to the next chevron tab, **Punch issues**.

Punch Issues lists employees who have exceptions and other issues that need to be resolved prior to moving forward. From this list, click an employee name, which will open the employee timecard. Resolve all exception issues, then save the timecard. From the **Punch Issues** chevron tab, click **Next** to go to **Timecards** chevron.

Timecard allows the user to navigate to each timecard one employee at a time, or skip to a specific timecard. Approve each timecard after reviewing by selecting the **Approve** drop-down list and clicking **Approve Timecard**. As overtime eligible employee timecards are approved the approver is asked to confirm the approval. When finished, click **Next**, to go to **Approve Timecards** chevron.



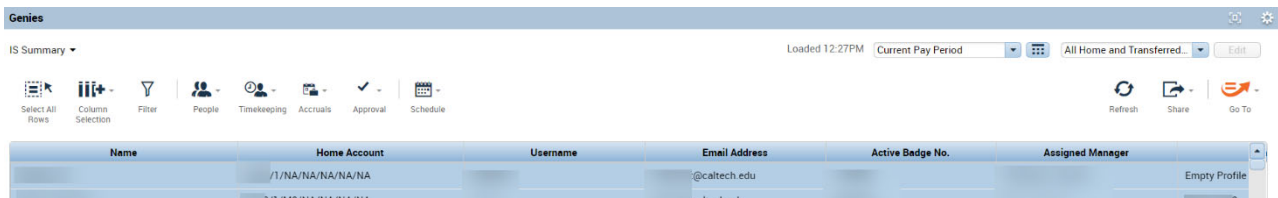
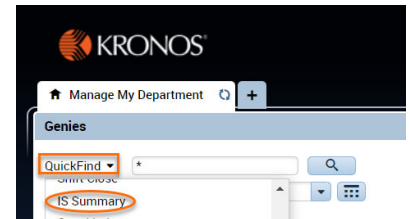
The **Approve Timecards** chevron lists all employees in the selected group, allowing you to review which have been approved or signed off. Missing punches can also be viewed here for verification. After all timecards are reviewed and approved, click **Select All Rows**, then select **Approve > Sign-Off**.

Using the IS Summary Genie

The IS Summary is a handy tool that allows you to view your employees and download employee lists. With this you can quickly:

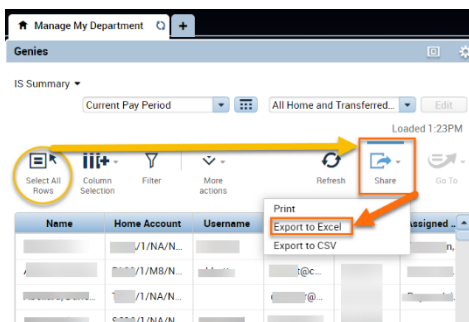
- See all employees to whom you have access, or all employees in a group
- Identify the employees' primary department/ORG and timecard approver
- Identify changes to ORG or timecard approvers
 - Simply submit an EDA to update the approver or the ORG
- Export this list in excel for other use

To access the IS Summary go to the Genies tab, open the drop-down menu and select the IS Summary. By default the IS Summary will open in the current period using the *All Home and Transferred In* query. The query parameters can be changed, as with other Kronos screens.



The standard/delivered genie will display the following columns:

- Name The employee's name as entered in Oracle.
- Home Account This is the primary Oracle department where wages are charged unless a 'transfer' is made.
- Username This is the Kronos/UKG username (generally the same as Caltech credentials).
- Email address The Caltech email address imported from Oracle.
- Active Badge No This is a Kronos created identifier and is not used at Caltech. This is NOT the UID. Please disregard this field.
- Assigned Manager This relates to the Oracle field for the Timecard Approver.
- Employee Group This field shows the access a user has in Kronos. Empty Profile indicates the user will only see their own timecard.
- Last Totalization Indicates the last time the data was updated. You can disregard this field.
- Work Phone This field is not used at Caltech.



The IS Summary is easily exportable to Excel, allowing you to manage, store and save information. Your system must have pop-ups enabled.

- Open the IS Summary with the desired group
- Click the *Select All Rows* icon
- Click the *Share* icon and select *Export to Excel*

Using Reports

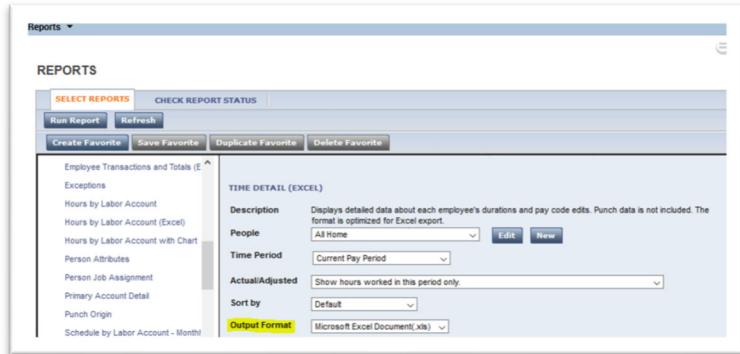
Kronos system components generate numerous standard reports. Many reports are delivered in Excel format as well as Adobe pdf. The report which is best for you will depend on your specific requirements.

Reports are divided into categories using system logic. All reports are included in the **All** category while some reports will appear in more than one category.

Each report has specific parameters which enable the report to run.

To run a report:

- Select the report you wish to use
- Use the drop-down lists to change any default parameters you choose
The default output format is Adobe (.pdf) for reports, even if the report is available in Excel.
- Click **Run Report**
- You are taken to the **Check Report Status** tab. Click **Refresh Status**.
- When the Status shows “Complete”, click View Report.

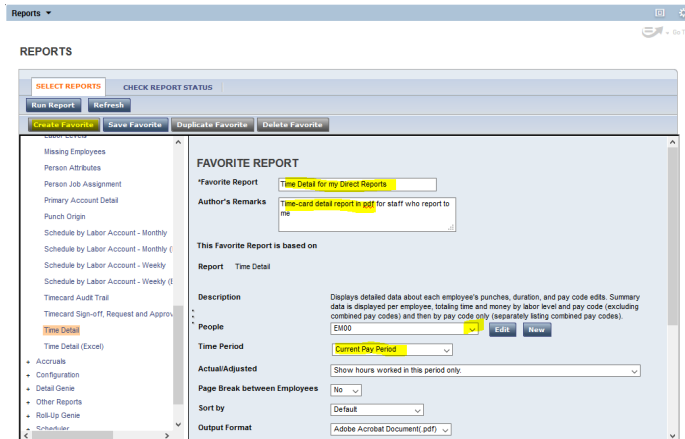


Users can designate certain reports as Favorites with the following steps:

- Select a report to designate as a favorite
- Select **Create Favorite**
- On the Favorite Report page, enter:

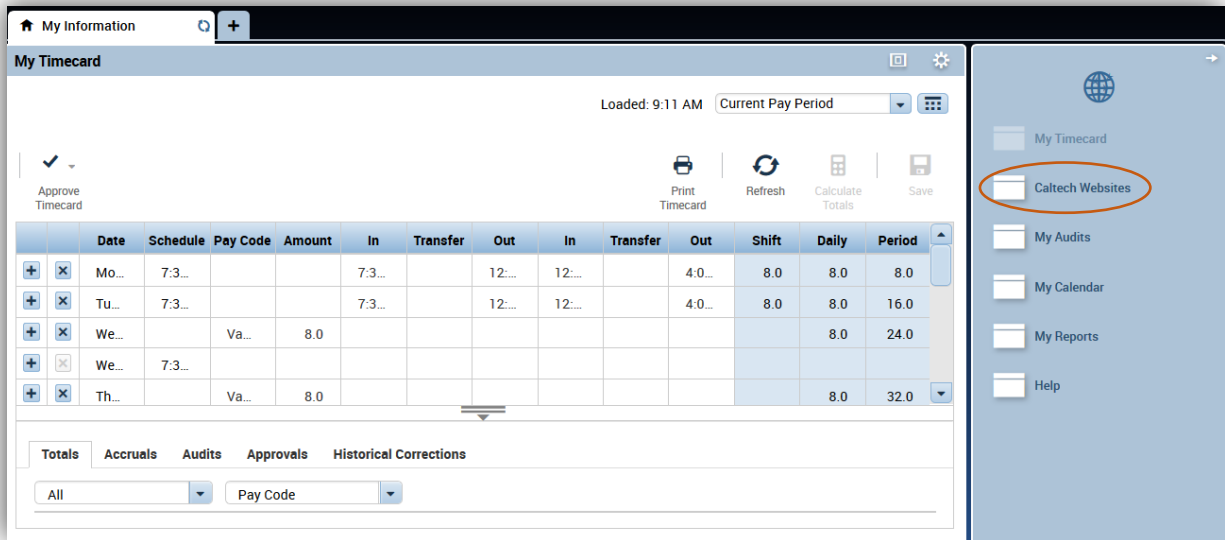
- **Favorite Report:** name the report
- **Author’s Remarks:** information about the report you find useful
- **Additional Fields:** complete additional fields if they appear

- Click **Save Favorite**

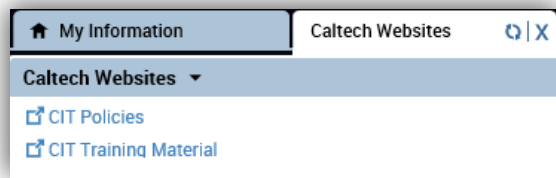


Viewing Caltech Websites

On the Related Items Panel of the Navigator, click the **Caltech Websites** link.



The **Caltech Websites** widget will open, showing the available sites:



- [CIT Policies](#)
- [CIT Training Material](#)
- [Caltech Payroll](#) Calendar

Resources for Making Corrections

To get more detailed information on timecard entry, use the following resources:

- Kronos Help Link
- Your Payroll Activity Monitor
- [CIT Policies](#)
- [CIT Training Material](#)
- [Caltech Payroll](#) Calendar
- Payroll Hotline x8668