

Kronos Workforce Ready Manager Guide

Getting Started

Getting started with the Time & Labor Module covers the following sections:

- Logging In
- Changing Your Password
- Common Icons and Screen Functions
- Navigation Bars
- Search
- Filters

LOGGING IN

To log into the Time & Labor Module, do the following:

1. Access the Kronos login page: <https://secure.saashr.com/ta/6144183.login?rnd=XSD>.
2. Enter your username and password and click **Login**.

When logging in as a manager, you will have more menu options than basic level employees. Menu options are determined by your security level. A manager's menu bar contains the following options:

- **My Account** - Use this menu to work on your own timesheets, time off requests and other information.
- **My Employees** - Used to manage users in the company, and can also include accruals, which would be used to run accrual rules against timesheet data, depending on enabled functionality.
- **Manage Time** - Use this menu to manage all timesheets and time off requests.
- **My Reports** - Use this menu to run reports.
- **Our Company** – Special announcements and documents will be placed here when needed.

CHANGING YOUR PASSWORD
















To change your password, do the following:

- Select **My Account > My Settings > Change Password**.
- Use the fields on the **Change Password** page to enter your old and new password, and then click **Save**.

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COMMON ICONS AND SCREEN FUNCTIONS

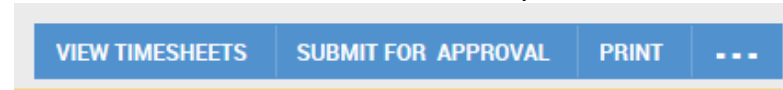
Listed below are some of the most common icons and their functions which can be found throughout the Time & Labor Module interface. Hovering your mouse over an icon will display a tool tip describing the function of that icon.

Icon	Function
	Provides calendar pop-up for you to select a date
	Delete current selection
	View/Edit current selection
	Add a note
	More menu options available
	Print timesheet
	Report and other settings
	Export
	Lookup options for current selection
	Run or Refresh
	View history
	View a full list of employees
	View time off counts
	Select, add, or approve
	Provides quick links to other options

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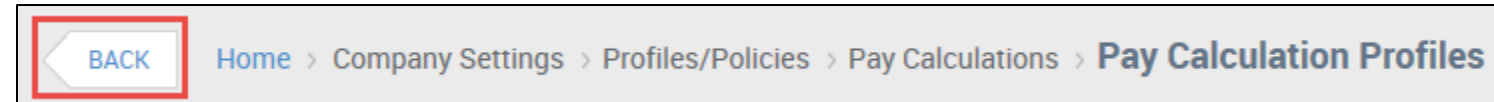
NAVIGATION BARS

Each page in the Time & Labor Module contains a navigation bar that provides buttons for performing actions specific to that area of the software. Always use the navigation bar buttons along with the Time & Labor Module menu options to navigate throughout the application, rather than the Back button offered in your web browser.

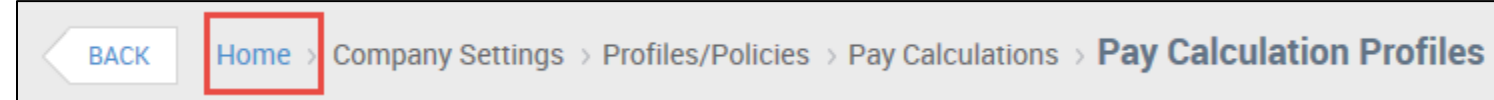


COMMON NAVIGATION OPTIONS

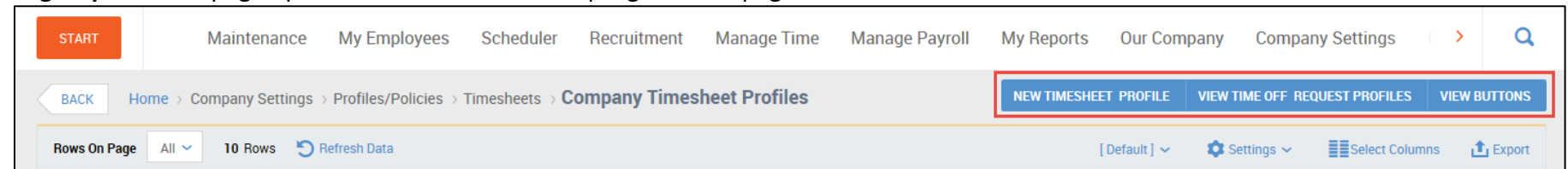
BACK button: Returns you to the previous page.



HOME button: When clicked, will return to your Home view.



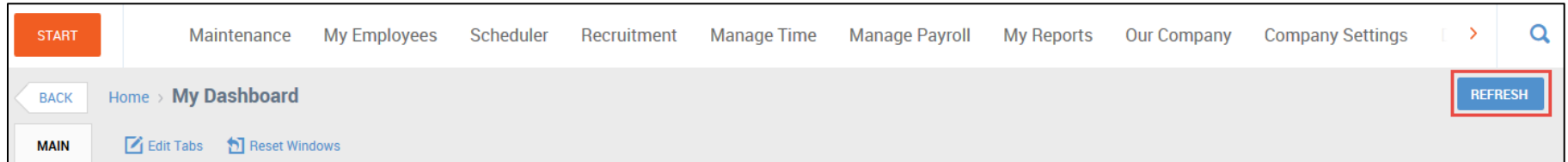
Page Options: All page options are located at the top-right of the page.



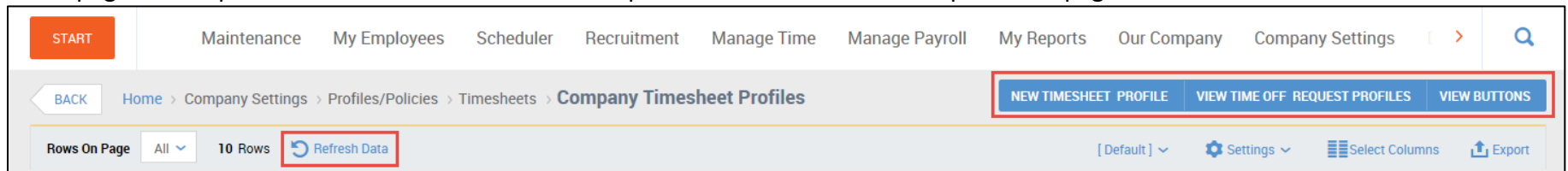
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Refresh Options:

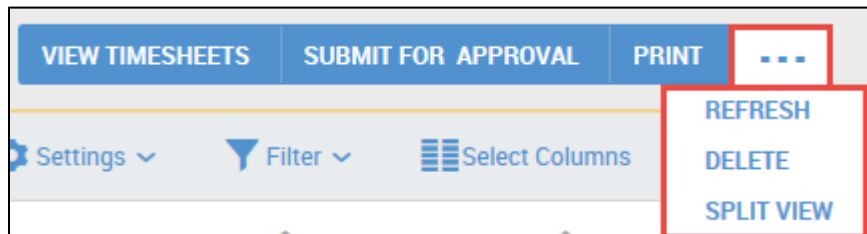
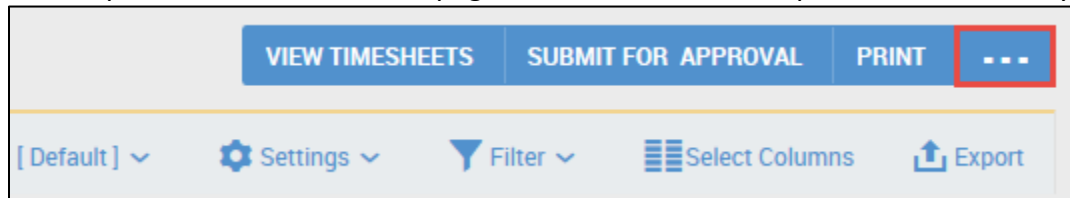
From the Home page, the **REFRESH** button will update the Home view.



Other pages and reports will contain the **Refresh Data** option and when clicked will update the page.



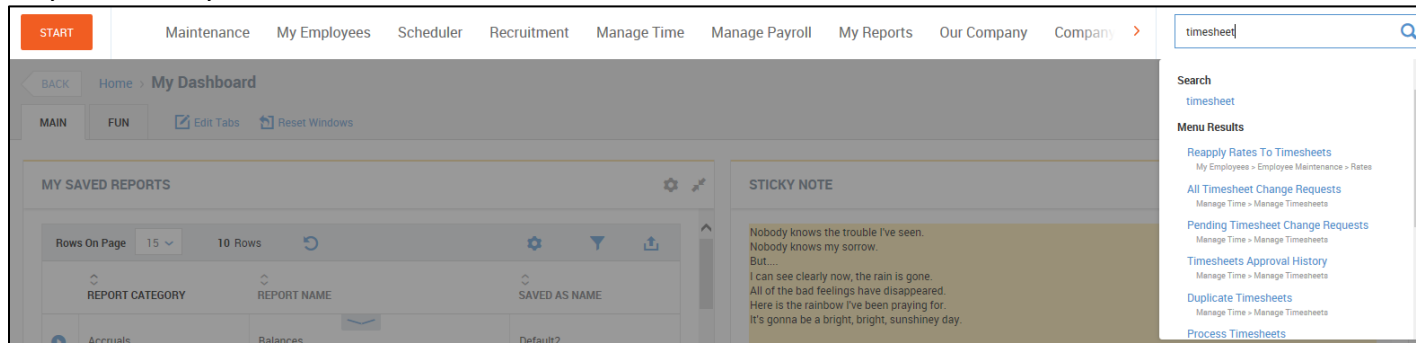
More Options Available: When a page has more than three options available, they will be accessed by clicking the  button.



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SEARCH

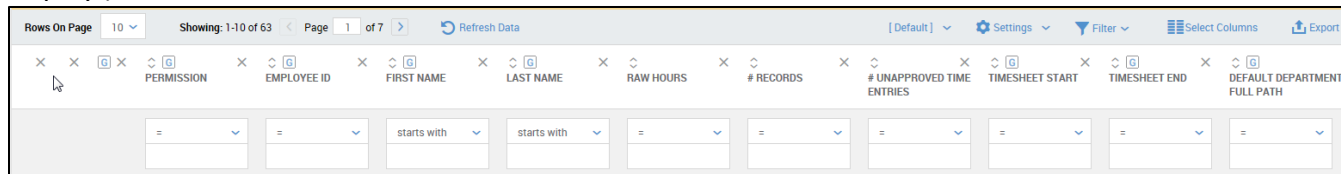
There is a Search Bar within the system that allows you to search for items throughout the system. This field will allow you to search for configuration pieces that are clickable, as well as specific employees (by name, Id, or badge). You will only be able to search for items based on your Security.



FILTERS

Many pages in the Time & Labor Module offer filters for sorting data that appears on the page (see example). These filters can be very helpful if you are looking for a specific record within a long list of data.

Example: You might be trying to find an employee account amongst a long list of employees. You can find that employee account quickly by entering the first few letters of an employee's last name in the **Last Name** filter field, selecting the **starts with** option, and clicking **Refresh Data**. The page will refresh and display all users who fit the criteria entered. (Ex., If you enter in Smi, both Sally Smith and Jane Smiley will display.)



You will notice most column headings in the filter area contain **G** and **X** symbols. The **G** symbol allows you to group the data on the page by that data type. The **X** symbol allows you to remove that data column altogether from the results on the page.

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In the drop-down menu, you will also see a variety of other symbols that allow you to search more specifically for an item. The following table defines and provides an example for each symbol.

Symbol	Definition	Example
=	Entry is exactly this	The entry equals 11/30/15
!=	Entry is not this	The entry does not equal 11/30/15
starts with	Entry starts with	Entry starts with abc
not starts with	Entry does not start with	Entry does not start with abc
like	Entry is like	Entry contains abc
not like	Entry is not like	Entry does not contain abc
<	Entries are less than	The entry is before 11/30/15
>	Entries are greater than	The entry is after 11/30/15
<=	Entries are not less than	The entry is before or on 11/30/15
>=	Entries are not greater than	The entry is on or after 11/30/15
is null	Entries that are blank	The entry is blank
is not null	Entries that are not blank	The entry has been filled in
In	Entries that include	The entry includes 11/30/15
not in	Entries that do not include	The entry does not include 11/30/15

The Employee Filter icon will allow you to filter reports by choosing specific employees or groups of employees.

[BACK](#)
[Home](#) > [My Reports](#) > [Time And Labor](#) > [Time Allocation](#) > **Detailed Hours**

Rows On Page 10
 No Rows
 [Refresh Data](#)

Employee Filter:  All Employees
 Timesheet Dates:
 Calendar Range
Today
(10/12/2015)

EMPLOYEE ID

FIRST NAME

LAST NAME

UNIFORM SIZE

PREF

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Once you click the icon, a screen appears (as shown below) with six tabs at the top of the screen.

Employees Filter

NOT SELECTED	SELECTED (0)	SAVED LISTS	COMPANY GROUPS	COMPANY PROFILES	ADVANCED FILTERS		
Rows On Page 10 ▾ 1-10 of 24 < Page 1 of 3 > ↺							
<input type="checkbox"/>	EMPLOYEE ID	BADGE	USERNAME	FIRST NAME	LAST NAME	EMPLOYEE STATUS	IN PAYROLL
	= ▾ <input type="text"/>	= ▾ <input type="text"/>	= ▾ <input type="text"/>	starts with ▾ <input type="text"/>	starts with ▾ <input type="text"/>	= ▾ Terminated <input type="text"/>	All ▾ <input type="text"/>
<input type="checkbox"/>	+ ⓘ 🔗 17		lberkman	Lance	Berkman	Active	Yes
<input type="checkbox"/>	+ ⓘ 🔗 4		cbing	Chandler	Bing	Active	Yes
<input type="checkbox"/>	+ ⓘ 🔗 21		bolentammy	Tammy	Bolen	Active	Yes
<input type="checkbox"/>	+ ⓘ 🔗 7900		lisa.brown	Lisa	Brown	Active	Yes
<input type="checkbox"/>	+ ⓘ 🔗 6		pbuffer	Phoebe	Buffer	Active	Yes
<input type="checkbox"/>	+ ⓘ 🔗 13		ccarpenter	Chris	Carpenter	Active	Yes
<input type="checkbox"/>	+ ⓘ 🔗 7899		lorrie.cook	Lorrie	Cook	Active	Yes

< ADD SELECTED >

USE FILTER SAVE LIST AS

- **Not Selected** - Shows all available employees. You can check the boxes to individually select employees to include in the report. Click the **ADD SELECTED** button to include the selected employees.
- **Selected** - Shows selected employees.
- **Saved Lists** - Indicates previously saved lists. You can create new lists by clicking the **SAVE LIST AS** button.
- **Company Groups** - Allows you to filter the report by company groups.
- **Company Profiles** - Allows you to filter the report by company profiles.
- **Advanced Filters** - Allows you to create a custom filter based on the settings that you choose.

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Manager Tasks

This section provides comprehensive information on the Time & Labor Module functions specific to the manager role. It contains the following sections:

- Managing Timesheets
- To Do's
- Approving and Rejecting Timesheets
- Managing Time Off Requests
- Reports

NOTE: Even though this guide covers and explains certain topics, your individual security rights will determine what you can see and do within the system.

MANAGING TIMESHEETS

As a manager it is likely you have been designated to approve timesheets for some or all of your employee accounts. This section describes how to view timesheets in detail, edit timesheets, and approve or reject timesheets.

NOTE: Depending on the type of timesheet profile that has been assigned to your employees, and your own individual security rights, will determine the options available within timesheets.

In this section:

- Editing Time Entries in Timesheets
- Adding a Time Entry
- Adding Time Off
- Entering On Call Pay
- Entering Training Time
- Adding Notes
- Time Allocation within Cost Centers
- Printing a Timesheet

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EDITING TIME ENTRIES IN TIMESHEETS

You may notice that an employee made a timesheet error that must be corrected. As a manager you can access your employees' timesheets and make those corrections when necessary.

To edit a time entry in an employee's timesheet, do the following:

1. Navigate to one of the following:
 - *Manage Time > Manage Timesheets > By Pay Period*
 - *Manage Time > Manage Timesheets > Current*
 - *Manage Time > Manage Timesheets > All*
2. Locate the timesheet you want to edit and click the *Edit Timesheet* button.
3. On the *Timesheet* tab, use the drop-down above the columns to select the day to be edited. On that date, you will view any punches recorded for that day.
4. In the example shown below, the employee missed the first punch of the day. To edit, click within the **From** field, and enter the start time for that day.
5. To add additional rows, click the *Add Rows* button.

IN DATE	FROM	TO	RAW TOTAL	CALC. TOTAL
Mon 28 ▾	8:30a	3:00p	0:00	?
Mon 28 ▾	3:00p	6:00p	3:00	?
Day Total:			3:00	?
Timesheet Total:			3:00	?

6. After completing your edits, click the **Save** button.

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ADDING A TIME ENTRY

You may need to add a complete time entry for times when employees are unable to punch.

To add a time entry in an employee's timesheet, do the following:

1. Navigate to one of the following:
 - *Manage Time > Manage Timesheets > By Pay Period*
 - *Manage Time > Manage Timesheets > Current*
 - *Manage Time > Manage Timesheets > All*
2. Locate the timesheet you want to edit and click the *Edit Timesheet* button.
3. On the *Timesheet* tab, use the drop-down above the columns to select the day to be edited.
4. Click within the **From** field, and enter the start time for that day.
5. Click within the **To** field, and enter the start time for that day.
6. Optionally, you can edit the cost center if the time entry should be charged to a cost center other than the employee's default cost center. Click the drop-down or lookup list icon in the Cost Center column and select the desired option.
7. If a time entry should contain multiple rows, click the *Add Rows* button to add another time entry.
8. Click the **Save** button.

ADDING TIME OFF

One of the more common edits to make is to add an entry for time off.

To add a time off entry, do the following:

1. Navigate to one of the following:
 - *Manage Time > Manage Timesheets > By Pay Period*
 - *Manage Time > Manage Timesheets > Current*
 - *Manage Time > Manage Timesheets > All*
2. Locate the timesheet you want to edit and click the *Edit Timesheet* button.
3. On the *Timesheet* tab, use the drop-down above the columns to select the day to be edited.
4. Click the drop-down or lookup list icon in the **Time Off** column and select the time off code.
5. Click in the **Total** or **Raw Total** field for that day and type the number of hours required.
6. Click the **Save** button.

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ENTERING ON CALL PAY

As a manager you may need to apply a bonus to the timesheets of employees working On Call for a given week.

To enter On Call pay, do the following:

1. Navigate to the employee's timesheet by following the steps outlined in the "Managing Timesheets" section of this document.
2. On the first day that the employee is scheduled as On Call, select *On Call \$25.00* or *On Call \$50.00* from the Training/On Call drop down menu. You may need to click the blue paper/magnifying glass icon to select the proper On Call option if it is not readily available in the drop-down menu. The dollar amount you select will depend on the policy for your department.
3. Click *Save*.

ENTERING TRAINING TIME

As a manager you may need to designate an employee's worked hours as "Training" for CMS reporting purposes.

To designate an employee's worked hours as "Training", do the following:

1. Navigate to the employee's timesheet by following the steps outlined in the "Managing Timesheets" section of this document.
2. On the day that the employee worked a Training shift, select *Training* from the Training/On Call drop down menu. You may need to click the blue paper/magnifying glass icon to select *Training* if it is not readily available in the drop-down menu.
3. Click *Save*.

ADDING NOTES

If notes have been enabled for your timesheets, you may have the option of adding a note for each time entry or for each day.

1. Click the *Notes* icon to add a note, type the text and **Save**.
2. Multiple notes may be added for each day.
3. All notes entered for an employee's timesheet can be viewed by clicking the *Notes* icon under the time entries.




Notes can then be viewed within the **All Timesheet Notes** report under *My Reports > Time & Labor > Time Allocation > All Timesheet Notes*.

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TIME ALLOCATION WITHIN COST CENTERS

If the "Show Change Cost Centers Time Allocation" has been added to your employee's Timesheet Profile, a button, "Change Cost Centers Time Allocation" will be available for each time entry within a timesheet. This option gives you a simple way to insert or split a time record at a certain time of the day and select a new cost center in which to charge that section of time with a minimal number of clicks involved. After the entry is inserted the system will automatically create In/Out punches for the new time record.













Click the icon for the time entry to be split:

DEPARTMENT	
	 Corporate/Human Resourc 

Enter the Cost Center information and the "Split At" time:

Change Cost Centers Time Allocation	
Department	Engineering  
Location	 
Job	 
From	08:00a To 05:30p
Split At*	3:00p
<div>OK CANCEL</div>	

Result:

DEPARTMENT		IN DATE	FROM	TO	RAW TOTAL
	 Corporate/Human Resourc 	Wed 30 	 8:00a	3:00p 	7:00
	 Engineering 	Wed 30 	 3:00p	5:30p 	2:30
Day Total:					9:30

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PRINTING A TIMESHEET

To print an employee's timesheet, do the following:

1. In the employee's timesheet, click the *Utilities* button.
2. Click *Print*.
3. The following options will appear:

Print Timesheet

⚠ For best results, printing in landscape view is recommended.

☒ Header

☒ Time Information

☐ Include Unpaid Lunches and Breaks

☐ Include Raw In/Out Time

☐ Manual Adjustments *e* Indicator

☐ Include Daily Totals

☒ Include Counters

☐ Include Pay Period Totals

☒ Include Column Totals

☐ Include Detailed Calculations

☐ Include Exceptions

☐ Time Summary Totals

☒ Include Time Off

☐ Shift Premium

☐ Percentages

☐ Department Level

☐ Location Level

☐ Job Level

☒ Notes

☒ Time Entry

☒ Daily Notes

☒ Extra Pay Notes

☒ Adjustments Notes

☒ Timesheet Approval Comments

☐ Timesheet Approval History

☒ Extra Pay Information

☒ Print Code Description

☒ Time Off Counts

☒ Vacation

☒ Sick

☒ Floating Holiday

Print Department

Print Location

Print Job

Print Time Off

☐ Rate Table 1 Rate

☐ Piece Rate Table 1 Rate

- **Header** – Will print timesheet with employee's name, Id, pay period dates, the date and time it was printed.
- **Time Information** – Will print timesheet with employee's from and to times as well as the calculated regular and overtime.
- **Time Summary Totals** – Check the options to be included in the summary totals.
- **Notes** – Will print timesheet with any notes left by the employee or manager (Time entry, daily, bonus, adjustment, and/or approval comments.)
- **Timesheet Approval History** – Provides a view of the timesheet approvers and the state of the timesheet.
- **Extra Pay Information** – Will print timesheet extra pay information as well as any codes.

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- **Time Off Counts** – Check the time off categories to be included and shown as sub-totaled.
- **Manager Signature Line** - A signature line will appear for the supervisor upon printing the timesheet. You may also customize the label for the signature line.
- **Employee Signature Line** - A signature line will appear for the employee upon printing the timesheet.
- **Print One Timesheet Per Page** – Check to print each employee timesheet on a separate page.
- **Print** – Will print the employee's timesheet.
- **Print Preview** – Will display a preview of what the timesheet or employee file will look like when printed. The example shown below has all options checked. The system will remember the last settings used in subsequent runs of the *Print Preview* and *Print* options.

Employee Timesheet											Unique Boutique Full Suite				
Yadier Molina (Employee Id: 15)											Date: 01/20/2016				
12/28/2015 - 01/10/2016											Time: 02:30p				
Date	Sch	From	To	Calc. From	Calc. To	Exceptions	Department	Location	Job	Shift Premium	Vacation	Unpaid Time	Total Time	Pay Period Total	Daily Overtime
Mon/Not 12/28/2015	Scheduled	e 08:30a	e 03:00p	08:30a	03:00p		Corp/Admin	Dallas	Department Manager	First Shift: 5:24		1:08	5:24	5:24	
		e 03:00p	e 06:00p	03:00p	06:00p		Corp/Admin	Dallas	Department Manager	First Shift: 3:00			3:00	8:24	
Day Total:		08:30a	06:00p	08:30a	06:00p							1:08	8:24	8:24	0:24
Tue/Not 12/29/2015	Scheduled	e 08:00a	e 05:30p	08:00a	05:30p		Corp/Hum Res			First Shift: 9:30	9:30		9:30	17:54	
Day Total:		08:00a	05:30p	08:00a	05:30p						9:30		9:30	9:30	0:00
Wed/Not 12/30/2015	Scheduled	e 08:00a	e 03:00p	08:00a	03:00p		Corp/Hum Res			First Shift: 5:54		1:08	5:54	23:48	
		e 03:00p	e 05:30p	03:00p	05:30p		Eng			First Shift: 2:30			2:30	26:18	
Day Total:		08:00a	05:30p	08:00a	05:30p							1:08	8:24	8:24	0:24
Thu/Not 12/31/2015	Scheduled	e 08:00a	e 12:00p	08:00a	01:00p		Corp/Hum Res			First Shift: 4:00		1:00	4:00	30:18	
		e 01:00p	e 05:00p	01:00p	05:00p		Corp/Hum Res			First Shift: 4:00			4:00	34:18	
Day Total:		08:00a	05:00p	08:00a	05:00p								1:00	8:00	0:00
Week Total:										First Shift: 34:18	9:30	3:12	34:18	34:18	
Total:										First Shift: 34:18	9:30	3:12	34:18	34:18	0:00
Total															
Calc Time (First Shift) VAC Total															
Corp/Admin	Dallas	DM								8:24		8:24	24.4898%		
Corp/Hum Res	N/A	N/A								13:54	9:30	23:24	68.2216%		
Eng	N/A	N/A								2:30		2:30	7.2886%		
Total Time										24:48	9:30	34:18			

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Notes													
Created	Created By	Type	Date	Note									
01/20/2016 02:48p	Lorrie Cook	Day	12/29/2015	New Note									

Approval History				
Date	Action	Note	Approved By	Disclaimer
No Results Returned				

Time Off Counts													
Time Off	Accrued To		Current Accrued	Taken	Current Balance	Sch	Projected Accrual	Projected Balance	Accrue Rate	Carry Over To Use	Used By Date	Last Carry Over	Earned After Last Carry Over
Floating Holiday	01/01/2016	Hrs: 16:00 Days: 2.00	16:00 0.00	0:00 0.00	16:00 2.00	0:00 0.00	16:00 2.00	16:00 2.00	2/Yearly			0:00 0.00	16:00 2.00
<ul style="list-style-type: none"> Employee will have 16:00 hours left at the end of current accrual year. 16:00 hours will be lost due to carry over settings. 													
01/01/2015 - 01/01/2016													
Personal	01/01/2016	Hrs: 8:00 Days: 1.00	8:00 1.00	0:00 0.00	8:00 1.00	0:00 0.00	8:00 1.00	8:00 1.00	1/Yearly			0:00 0.00	8:00 1.00
<ul style="list-style-type: none"> Employee will have 8:00 hours left at the end of current accrual year. 8:00 hours will be lost due to carry over settings. 													
01/01/2015 - 01/01/2016													
Sick	01/02/2016	Hrs: 80:00 Days: 10.00	4:00 0.50	76:00 9.50	0:00 0.00	80:00 10.00	76:00 9.50	10/Yearly				0:00 0.00	80:00 10.00
<ul style="list-style-type: none"> Employee will have 76:00 hours left at the end of current accrual year. 76:00 hours will be lost due to carry over settings. 													
01/02/2015 - 01/02/2016													
Vacation	07/01/2015	Hrs: 50:00 Days: 6.25	24:00 3.00	26:00 3.25	0:00 0.00	120:00 15.00	96:00 12.00	10 Hrs/Monthly				40:00 5.00	10:00 1.25
<ul style="list-style-type: none"> Employee will have 96:00 hours left at the end of current accrual year. 56:00 hours will be lost due to carry over settings. 40:00 hours will be carried over to the next accrual year. 													
02/01/2015 - 02/01/2016													

X _____
Supervisor Signature

X _____
Yadier Molina

PRINT

CHANGE OPTIONS

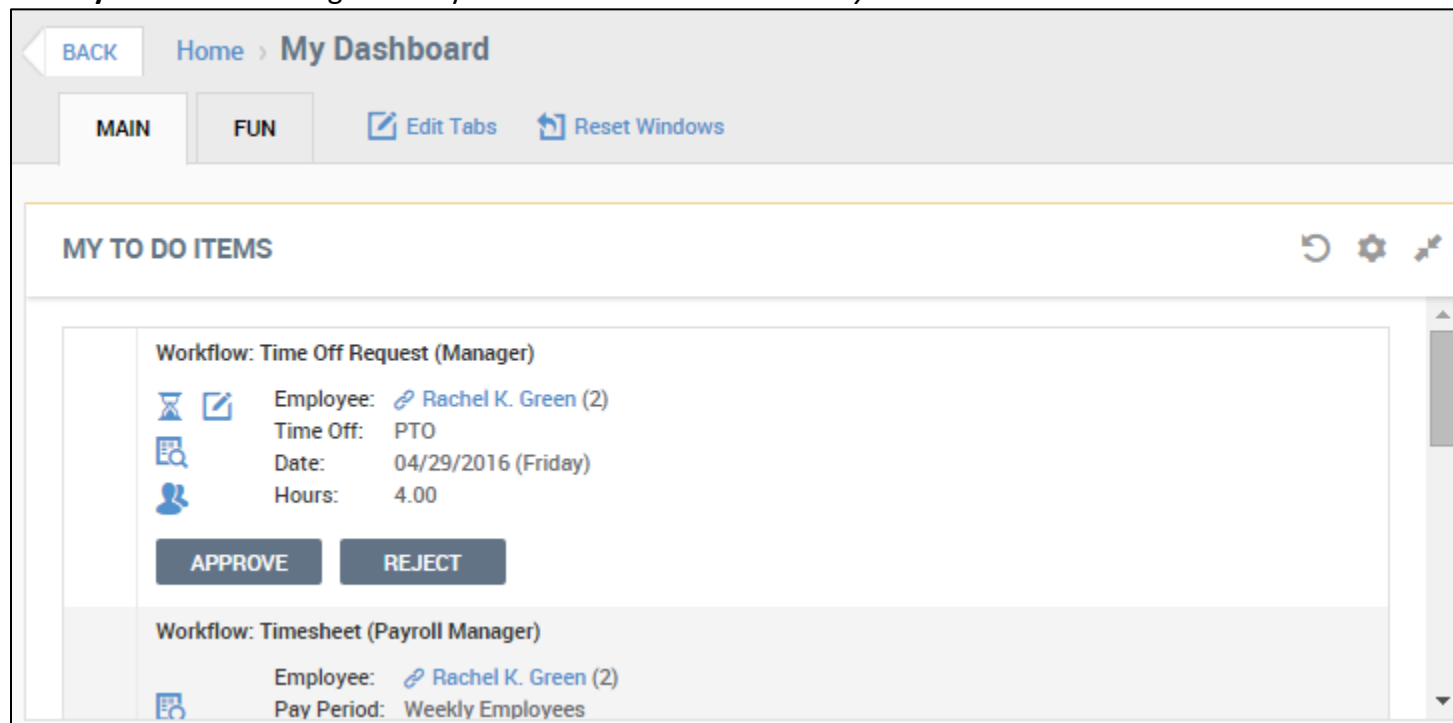
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TO DO ITEMS

Depending how your company is configured, you may be required to process employee requests, as well as some of your own information through a My To Do Item. Examples of items that can flow to your My To Do Items list can include the approval or rejection of Timesheets, Time Off Requests, and Leave of Absence Requests (if enabled.) Other automated tasks, depending on your role in the company may also flow into this area.

You can view your **To Do's** in one of three ways:

- The **My To Do Items** widget in on your home screen under the *My Dashboard* view.



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- By navigating to: **My Account > My To Do Items**.

MY TO DO ITEMS

Workflow: HR Action Request (Manager Approval)

Employee: [John David \(Default\) \(AA170\)](#)

HR Action: Ricks Promotion

Effective From: 04-14-2014

[APPROVE](#) [REJECT](#)

Workflow: HR Action Request

Employee: [Alexandra Myers \(Default\) \(123\)](#)

HR Action: Employee Termination

Effective From: 04-04-2014

[TERMINATE](#)

Workflow: Benefit Enrollment (Manager Approval)

Employee: [Harry Kent \(Default\) \(AA174\)](#)

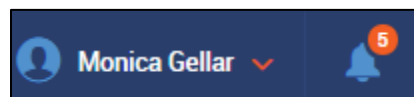
Name: Harry Kent: Open Enrollment

Reject Reason: rejection

[APPROVE](#) [REJECT](#)

[More Items](#)

- By clicking the red circle next to the bell icon in the upper corner of the session, which shows the number of items requiring your attention. Additionally, the manager will see a number in the upper-right corner of the screen, denoting the number of **To Do** items at all times.



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APPROVING AND REJECTING TIMESHEETS

As a manager you may have been designated to approve timesheets of some or all employee accounts. This section describes how to approve and reject timesheets.

The menu options available to you to approve/reject timesheets will depend on your individual security rights, as well as how your company is configured. The following options can be available for approving or rejecting timesheets:

- *Manage Time > Manage Timesheets > Pending Approval* (view, approve, reject, modify)
- *Manage Time > Manage Timesheets > All* (view and approve, reject, modify)
- *Manage Time > Manage Timesheets > By Pay Period*
- *Manage Time > Manage Timesheets > Current*
- *Manage Time > Manage Timesheets > All Open*
- *My To Do Items* (approved/rejected via workflow)

Employees who were not employed during this pay period, and do not have a timesheet, will not be displayed.

In this section:

- Current Timesheets
- All Timesheets
- By Pay Period
- Pending Approval

CURRENT TIMESHEETS

From the *Manage Time > Manage Timesheets > Current* menu option, you can view your employee's current timesheets. This option will also allow you view or edit the timesheets, submit the timesheets for approval, or approve or reject them.

This option will default to the current system date. You may change the date, but this option does not allow a date range.

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Current

Current Timesheets

VIEW TIMESHEETS

SUBMIT FOR APPROVAL

APPROVE

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Refresh Data

Full Screen

[Default]

Settings

Filter

Select Columns

Export

Employee Filter:

All Employees

Date:

01/25/2016

Custom Filter:

ADD NEW

		PERMISSION	APPROVAL STATE	EMPLOYEE ID	FIRST NAME	LAST NAME	RAW HOURS	# RECORDS	# UNAPPROVED TIME ENTRIES	TIMESHEET START	TIMESHEET END
		=	=	starts with	starts with	starts with	=	=	=	=	=
<input type="checkbox"/>											
		Edit	Open	1	Monica	Gellar	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	10	Ronald	Sherwood	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	11	Darryl	Dixon	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	12	William	Birnes	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	123456	Steve	Smith	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	13	Chris	Carpenter	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	14	Adam	Wainwright	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	15	Yadier	Molina	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	16	Mike	Matheny	80.00	10	10	01/17/2016	01/30/2016
<input type="checkbox"/>											
		Edit	Open	17	Lance	Berkman	80.00	10	10	01/17/2016	01/30/2016
Page Total							800.00	100	100		

To review timesheets, submit them for approval, and approve them, do the following:

1. Navigate to: *Manage Time > Manage Timesheets > Current*.
2. When satisfied with the timesheets, check one or more of the timesheets for your employees and click an option at the top of the screen. Options will include:
 - *View Timesheets* – View the timesheet, and if security rights allow, editing may also be done from this option.
 - *Submit For Approval* – This option will put the timesheets into a “Submitted” approval state. If you are not the approving manager, but instead have a hierarchy of approving managers, this option may be used to indicate the timesheets are ready to be approved.
 - *Approve* – If you are the approving manager, you can select one or more timesheets and click the *Approve* button. The timesheet status will change to “Approved (PayPrep Ready).”
 - *Reject* – When rejecting a timesheet, a comment may be required. Once rejected, the timesheet will change to “Open (Rejected)” and can then be edited and either submitted or approved again.
 - *...More Options* – Under this button, is the Reject option, as well as the Print, Refresh, Delete, or view the selected timesheet(s) in Split View options.

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3. Shown below are examples of how the timesheets may look after using the various options.

<input type="checkbox"/>					Edit	Open	16
<input type="checkbox"/>					Edit	Open	17
<input type="checkbox"/>					Edit	Open	18
<input type="checkbox"/>					Edit	Open (Rejected)	2 Rejected
<input type="checkbox"/>					Edit	Approved (PayPrep Ready)	3 Approved
<input type="checkbox"/>					Edit	Submitted	4
<input type="checkbox"/>					Edit	Submitted	5 Submitted for Approval
<input type="checkbox"/>					Edit	Submitted	6
<input type="checkbox"/>					Edit	Open	7

ALL TIMESHEETS

From the *Manage Time > Manage Timesheets > All* menu option, you can view all of your employee's timesheets. This option will also allow you view or edit the timesheets, submit the timesheets for approval, or approve or reject them.

This option will default to the current month. You may change the dates from the *Timesheet Dates* fields.

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All Timesheets

VIEW TIMESHEETS

SUBMIT FOR APPROVAL

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Refresh Data

Full Screen

[Default]

Settings

Filter

Select Columns

Export

Employee Filter

All Employees

Timesheet Dates

Calendar Range

This Month

(01/01/2016 – 01/31/2016)

Custom Filter

ADD NEW

	PERMISSION	EMPLOYEE ID	FIRST NAME	LAST NAME	RAW HOURS	# RECORDS	# UNAPPROVED TIME ENTRIES	TIMESHEET START	TIMESHEET END	DEFAULT DEPARTMENT FULL PATH	
		starts with	starts with	starts with							
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	1	Monica	Gellar	16.00	2	2	12/20/2015	01/02/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	1	Monica	Gellar	-	-	-	01/03/2016	01/16/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	1	Monica	Gellar	80.00	10	10	01/17/2016	01/30/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	10	Ronald	Sherwood	80.00	10	10	01/17/2016	01/30/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	11	Darryl	Dixon	80.00	10	10	01/17/2016	01/30/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	12	William	Birnes	80.00	10	10	01/17/2016	01/30/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	123456	Steve	Smith	80.00	10	10	01/17/2016	01/30/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	13	Chris	Carpenter	80.00	10	10	01/17/2016	01/30/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	14	Adam	Wainwright	80.00	10	10	01/17/2016	01/30/2016	
<input type="checkbox"/>	<div><div></div><div></div><div></div><div></div><div></div></div>	Edit	14	Adam	Wainwright	-	-	-	01/31/2016	02/13/2016	
Page Total					576.00	72	72				

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BY PAY PERIOD

From the *Manage Time > Manage Timesheets > By Pay Period* menu option, you can view all of your employee's timesheets according to their common pay period. This option will also allow you view or edit the timesheets, submit the timesheets for approval, or approve or reject them.

This option will default to no pay period selections. You may will need to select a pay period from the *Pay Period* fields.

BACK

Home > Manage Time > Manage Timesheets > By Pay Period > All Timesheets By Pay Period

VIEW TIMESHEETS

SUBMIT FOR APPROVAL

APPROVE

...

Rows On Page10Showing: 1-10 of 19Page1of 2Refresh DataFull Screen[Default]SettingsFilterSelect ColumnsExport

Employee Filter: All EmployeesPay Period: CurrentProfile: Bi-Weekly(01/17/2016 – 01/30/2016)Custom Filter: ADD NEW

	PERMISSION	APPROVAL STATE	EMPLOYEE ID	FIRST NAME	LAST NAME	RAW HOURS	# RECORDS	# UNAPPROVED TIME ENTRIES	EMPLOYEE STATUS	IN PAYROL							
	=	=	starts with	starts with	starts with	=	=	=	=	All							
<input type="checkbox"/>						Approvers	Edit	Submitted	1	Monica	Gellar	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	10	Ronald	Sherwood	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	11	Darryl	Dixon	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	12	William	Birnes	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	123456	Steve	Smith	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	13	Chris	Carpenter	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	14	Adam	Wainwright	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	15	Yadier	Molina	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	16	Mike	Matheny	80.00	10	10	Active	Y	
<input type="checkbox"/>						Approvers	Edit	Open	17	Lance	Berkman	80.00	10	10	Active	Y	
Page Total												800.00	100	100			

PENDING APPROVAL

From the *Manage Time > Manage Timesheets > Pending Approval* menu option, you can view all employee timesheets that have been submitted for approval. This option will also allow you view or edit, approve, and reject timesheets for approval.

This option will default to the current month. You may need to select a pay period from the *Timesheet Dates* fields.

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To review and approve timesheets awaiting approval, do the following:

1. Navigate to: *Manage Time > Manage Timesheets > Pending Approval*.
2. The *Timesheets Awaiting My Approval* screen will display. Adjust the time period, if necessary, by selecting options in the *Timesheet Dates* area above the columns.
3. Check the employees to be viewed and click the *Preview Timesheet* icon to see a view of the entries for each employee (shown below in the example) or click the *View Timesheets* button at the top of the page to view the entries in the timesheet, where they can also be edited. You can also edit the timesheet by choosing the *Edit Timesheet* icon.

Employee Timesheet - [Molina Yadier]

Rows On Page 200 10 Rows

DATE	HOURS	BREAK	# ENTRIES	TIME OFF NAME	DEPARTMENT	LOCA
	=	=	=		starts with	sta
01/11/2016	9:00	-	1		Human Resources	
01/12/2016	9:00	-	1		Human Resources	
01/13/2016	9:00	-	1		Human Resources	
01/14/2016	9:00	-	1		Human Resources	
01/15/2016	9:00	-	1		Human Resources	
01/18/2016	9:00	-	1		Human Resources	
01/19/2016	9:00	-	1		Human Resources	
01/20/2016	9:00	-	1		Human Resources	
01/21/2016	9:00	-	1		Human Resources	
01/22/2016	9:00	-	1		Human Resources	
Totals	00:00	-	10			

4. When the timesheet is ready to be approved, click the *Approve* button. If the *Approve* button is not available, check your My To Do Items for the employees pending approval.

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MANAGING TIME OFF REQUESTS

As a manager you may have been designated to approve time off requests of some or all employee accounts. This section describes how to approve and reject time off requests, as well as view time off counts in detail.

The menu options available to you to approve/reject timesheets will depend on your individual security rights, as well as how your company is configured. The following options can be available for approving or rejecting timesheets:

- *Manage Time > Time Off Requests > Pending Approval* (view and approve, reject, modify) – This option will only display if your company is not configured to handle the Time Off Request process via workflows.
- *Manage Time > Time Off Requests > AllOpen* (view and approve, reject, modify) - This option will only display if your company is not configured to handle the Time Off Request process via workflows.
- *Manage Time > Time Off Requests > All* (view only)
- *My To Do Items* (approved/rejected via workflow)

In this section:

- Pending Approval – Approving Time Off Requests
- Pending Approval – Rejecting Time Off Requests
- Pending Approval – Viewing Time Off Counts
- Pending Approval – Modifying Time Off Requests
- My To Do Items – Approving or Rejecting Time Off Requests
- Modifying Time Off Requests
- Opening the Timesheet
- Approving or Rejecting a Timesheet Change Request for a Time Off Request

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PENDING APPROVAL – APPROVING TIME OFF REQUESTS

To approve time off requests, do the following:

1. Navigate to: *Manage Time > Time Off Requests > Pending Approval*.
2. The *Time Off Requests Awaiting My Approval* screen will display.

	EMPLOYEE ID	USERNAME	FIRST NAME	LAST NAME	REQUESTED WEEKDAY	DATE REQUESTED	FROM	TO	TIME	TIME OFF	COM.	EMPLOYEE STATUS	DATE/TIME SUBMITTED
<input type="checkbox"/>	2	rgreen	Rachel	Green	Monday	03/14/2016	-	-	8.00	Vacation	-	Active	01/22/2016 09:30a
<input type="checkbox"/>	2	rgreen	Rachel	Green	Tuesday	03/15/2016	-	-	8.00	Vacation	-	Active	01/22/2016 09:30a
<input type="checkbox"/>	2	rgreen	Rachel	Green	Wednesday	03/16/2016	-	-	8.00	Vacation	-	Active	01/22/2016 09:30a
<input type="checkbox"/>	2	rgreen	Rachel	Green	Thursday	03/17/2016	-	-	8.00	Vacation	-	Active	01/22/2016 09:30a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Monday	04/18/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Tuesday	04/19/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Wednesday	04/20/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Thursday	04/21/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Sunday	04/24/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Monday	04/25/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Tuesday	04/26/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Wednesday	04/27/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a
<input type="checkbox"/>	3	rgellar	Ross	Gellar	Thursday	04/28/2016	-	-	8.00	PTO	-	Active	01/22/2016 09:44a

3. Select the checkboxes that correspond to the submitted time off requests you want to approve and click the *Approve Checked Request* button.
4. The system prompts you to confirm your decision and also provides a text box for you to attach any comments regarding your decision. The employee will receive this comment when they review their submitted time off request. Once approved, the request(s) will populate the employee's timesheet.

PENDING APPROVAL - REJECTING TIME OFF REQUESTS

To reject time off requests, do the following:

1. Navigate to: *Manage Time > Time Off Requests > Pending Approval*.
2. The *Time Off Requests Awaiting My Approval* screen will display.
3. Select the checkboxes that correspond to the submitted time off requests you want to reject and click the *Reject Checked Requests* button.
4. The system prompts you to confirm your decision and also provides a text box for you to attach any comments regarding your decision. The employee will receive this comment when they review their submitted time off request.

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PENDING APPROVAL - VIEWING TIME OFF COUNTS

To view time off counts, do the following:

1. Navigate to: *Manage Time > Time Off Requests > Pending Approval*.
2. The *Time Off Requests Awaiting My Approval* screen will display.
3. Click the *Hourglass* icon next to the desired employee's time off request.
4. The *Time Off Counts* window for that employee will display, where you can view the employee's time off counts in detail.
 - If the numbers in the **Pending Approval** column appear in **green**, the employee has a sufficient time off balance for the pending request.
 - If the numbers in the **Pending Approval** column appear in **red**, the employee does not have a sufficient time off balance for the pending request at this time.
 - In the **Taken** column, the balance shown here is selectable. Click the number link to be taken to the *View History* screen.
 - In the **Sch** column, the balance shown here is selectable. Click the number link to be taken to the *View Schedule Time* screen.

Time Off Counts

TIME OFF	ACCRUED TO		CURRENT ACCRUED	TAKEN	CURRENT BALANCE	SCH	PENDING APPROVAL
PTO	01/22/2016	Hrs:	120.00	0.00	120.00	0.00	72.00
		Days:	15.00	0.00	15.00	0.00	9.00
<ul style="list-style-type: none">72.00 hours are requested for next accrual year.							
02/01/2015 - 02/01/2016							

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PENDING APPROVAL - MODIFYING TIME OFF REQUESTS

To modify time off requests, do the following:

1. Navigate to: *Manage Time > Time Off Requests > Pending Approval*.
2. To modify a single request, check the employee's request that you wish to modify and click the *Modify Requests* icon.

The screenshot shows two side-by-side panels. The left panel, titled 'MODIFY TIME OFF REQUEST', contains a form with the following fields: 'Time Off' (set to 'PTO'), 'From' (empty), 'To' (empty), 'Hours' (set to '8.00'), and a 'Comment' text area. The right panel, titled 'BALANCES', displays a table with the following data:

TIME OFF	ACCRUED TO	CURRENT ACCRUED	TAKEN	CURRENT BALANCE	SCH	PENDING APPROVAL
PTO	01/22/2016	Hrs: 120.00 Days: 15.00	0.00 0.00	120.00 15.00	0.00 0.00	72.00 9.00

Below the table, a note states: '72.00 hours are requested for next accrual year.' and the date range '02/01/2015 - 02/01/2016' is shown.

3. You will then be able to edit the request and add an optional comment. The *Balances* will display along with the edit area to aide in process.
4. To modify one or more requests, check the entries and click the *Modify Requests* button at the top of the page.

The screenshot shows a dialog box titled 'Information' with the instruction 'Only edit fields that need to be modified.' The form inside the dialog box includes: 'Time Off' (set to 'PTO'), 'From' (empty), 'To' (empty), and 'Hours' (set to '4.00'). At the bottom of the dialog box are two buttons: 'OK' and 'CANCEL'.

5. Edit as needed, and click Ok.

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MY TO DO ITEMS - APPROVING OR REJECTING TIME OFF REQUESTS

To approve or reject time off requests from a My To Do Item, do the following:

1. Sign in to your session.
2. Access your *My To Do Items* list from one of the options described above.
3. The Time Off Requests requiring your attention will display. From here, you can Approve, Reject, or use one of the other icons shown to get information that may help in your decision to approve or reject the request. The example shown below is from the My To Do Items widget.

MY TO DO ITEMS

Workflow: Time Off Request (Manager)

Employee: Rachel K. Green (2)
Time Off: PTO
Date: 04/29/2016 (Friday)
Hours: 8.00

APPROVE **REJECT**

MODIFYING TIME OFF REQUESTS

To modify time off requests within a My To Do Item, do the following:

1. Click the *Edit* icon within the request.
2. The *Modify Time Off Request* page will open and will also display the employee's accrual balances.

MODIFY TIME OFF REQUEST

Time Off: PTO
From: [] To: [] Hours: 8.00
Comment: []

BALANCES

TIME OFF	ACCRUED TO	CURRENT ACCRUED	TAKEN	CURRENT BALANCE	SCH	PENDING APPROVAL	ACCRUE RATE	CARRY OVER TO USE	USED BY DATE	LAST CARRY OVER	EARNED AFTER LAST CARRY OVER
PTO	01/22/2016	Hrs: 120.00 Days: 15.00	0.00 0.00	120.00 15.00	0.00 0.00	8.00 1.00	120/Yearly			0.00 0.00	120.00 15.00

11/10/2015 - 11/10/2016

3. Enter either *From/To* information, or change the *Hours* field and click *Save*.

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OPENING THE TIMESHEET

To open the timesheet from within a time off request within a My To Do Item, do the following:

1. Click the *Open Timesheet* icon within the request.
2. The timesheet will open, and depending on your security rights and company processes, the timesheet may be able to be edited, saved, and resubmitted. This option is generally used to verify information.

The screenshot shows the 'Timesheet Edit' interface for employee Rachel K. Green. The top navigation bar includes 'BACK', 'Home', 'Manage Time', 'Manage Timesheets', 'All', and 'Timesheet Edit'. Action buttons on the right are 'SAVE', 'UNDO', 'SUBMIT FOR APPROVAL', 'UTILITIES', and 'INFO'. Below the navigation, there are tabs for 'ADJUSTMENTS', 'EXTRA PAY & COUNTER ADJ.', 'TIMESHEET' (selected), 'EXCEPTIONS', 'CALC. DETAIL', 'CALC. SUMMARY', 'COUNTERS', 'SUMMARY BY DAY', and 'SCHEDULE'. A date range selector shows 'Time Sheet: April 24, 2016 - April 30, 2016'. The main table has columns: COST CENTER 1, COST CENTER 10, TIME OFF, DURATION, SHIFT, PAY CATEGORY, NOTES, IN DATE, FROM, TO, RAW TOTAL, CALC. TOTAL, and PIECEWORK. The first row shows 'Dallas Office/IT' as the cost center, 'Second Shift' as the shift, and 'Fri 29' as the date. Totals for the day and the entire timesheet are shown at the bottom right.

COST CENTER 1	COST CENTER 10	TIME OFF	DURATION	SHIFT	PAY CATEGORY	NOTES	IN DATE	FROM	TO	RAW TOTAL	CALC. TOTAL	PIECEWORK
Dallas Office/IT				Second Shift			Fri 29			0.00	0.00	0
Day Total:										0.00	0.00	
Timesheet Total:										0.00	0.00	

3. Click the *Back* button in your session (not your browser) to return to the request.

APPROVING OR REJECTING A TIMESHEET CHANGE REQUEST FOR A TIME OFF REQUEST

Once you have approved a Time Off Request, and it has been populated to the employee's timesheet, the employee may wish to alter the request through a Timesheet Change Request (if configured and allowed.) Once the employee makes such a request, you will need to approve or reject the change.

To approve or reject a change request, do the following:

1. Navigate to: *Manage Time > Manage Timesheets > Pending Timesheet Change Requests*. You can also navigate to: *Manage Time > Manage Timesheets > All Timesheet Change Requests*.

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BACK Home > Manage Time > Manage Timesheets > Pending Timesheet Change Requests > Timesheet Change Requests Pending Approval										
<div> APPROVE CHECKED REQUESTS REJECT CHECKED REQUESTS </div>										
<div> Rows On Page: 20 3 Rows Refresh Data Full Screen [Default] Settings Filter Select Columns Export </div>										
Employee Filter: All Employees Time Entry Date: Calendar Range This Year (01/01/2016 – 12/31/2016)										
<input checked="" type="checkbox"/>	EMPLOYEE ID	FIRST NAME	LAST NAME	TIME ENTRY DATE	REQUEST TYPE	ACTION TYPE	REQUEST COMMENT	FIELD	OLD VALUE	NEW VALUE
	starts with	starts with	starts with	=	=	=	=	=	=	=
<input checked="" type="checkbox"/>	3	Ross	Gellar	04/18/2016	Modify Time Off	Change Field	Decided to take full day instead of half day.		Total Time=4.00, Time Off=PTO	Total Time=8.00, Time Off=PTO
<input checked="" type="checkbox"/>	3	Ross	Gellar	04/19/2016	Modify Time Off	Change Field	Decided to take full day instead of half day.		Total Time=4.00, Time Off=PTO	Total Time=8.00, Time Off=PTO
<input checked="" type="checkbox"/>	3	Ross	Gellar	04/20/2016	Modify Time Off	Change Field	Decided to take full day instead of half day.		Total Time=4.00, Time Off=PTO	Total Time=8.00, Time Off=PTO

2. Select the checkboxes that correspond to the submitted timesheet change request you want to approve or reject and click the **Approve Checked Requests** button to approve, or the **Reject Checked Requests** button to reject.

ACCRUALS

The Accruals module allows you to track the benefit time your employees have accrued and used.

VIEWING ACCRUAL BALANCES

To view employee accrual balances, do the following:

1. Navigate to: *My Employees > Accruals > Balances*. The *Accrual Balances* page will display, as shown. The following columns may be available, but you can add and remove columns by using the *Select Columns* link. These are the common columns you will see:
 - **Accrual Profile** – The profile to which the employee is assigned.
 - **Time Off** – The type of accrual balance assigned to the employee.
 - **Updated To Date** – The date which the balance is updated to or as of.
 - **Hours Earned YTD** – Balance earned year-to-date.
 - **Hours Taken YTD** – Time off taken year-to-date.
 - **Hours Scheduled** – Time off scheduled in the future.
 - **Hours Remaining** – Balance remaining.

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BACK

Home

My Employees

Accruals

Balances

Accrual Balances

EXECUTE ACCRUALS

ROLLBACK ACCRUALS

MOVE BALANCES

...

Rows On Page100100 RowsRefresh Data

Full ScreenDefault2SettingsFilterSelect ColumnsExport

Employee Filter: All Employees

ALL

PAGE

PAY PERIOD PROFILE

ACCRUAL PROFILE

TIME OFF

EMPLOYEE ID

FIRST NAME

LAST NAME

EMPLOYEE STATUS

LOCKED

START DATE

UPDATED TO DATE

DAYS EARNED YTD

HOURS EARNED YTD

DAYS 1

starts with

starts with

=

=

starts with

starts with

Is Terminated

No

=

=

=

=

=

<input type="checkbox"/>					Bi-Weekly	PTO	Vacation	1	Monica	Gellar	Active	No	09/30/2011	12/30/2015	8.75	70.00
<input type="checkbox"/>					Bi-Weekly	PTO	Personal	1	Monica	Gellar	Active	No	09/30/2011	01/01/2016	1.00	8.00
<input type="checkbox"/>					Bi-Weekly	PTO	Floating Holiday	1	Monica	Gellar	Active	No	09/30/2011	01/01/2016	2.00	16.00
<input type="checkbox"/>					Bi-Weekly	PTO	Sick	1	Monica	Gellar	Active	No	09/30/2011	01/02/2016	10.00	80.00
<input type="checkbox"/>					Bi-Weekly	TimeWorked	Vacation	2	Rachel	Green	Active	No	11/10/2011	03/31/2015	5.25	42.00
<input type="checkbox"/>					Bi-Weekly	TimeWorked	Personal	2	Rachel	Green	Active	No	11/10/2011	12/30/2014	1.00	8.00
<input type="checkbox"/>					Bi-Weekly	TimeWorked	Floating Holiday	2	Rachel	Green	Active	No	11/10/2011	12/30/2014	2.00	16.00
<input type="checkbox"/>					Bi-Weekly	TimeWorked	Sick	2	Rachel	Green	Active	No	11/10/2011	12/30/2014	10.00	80.00
<input type="checkbox"/>					Bi-Weekly	PTO	Vacation	3	Ross	Gellar	Active	No	02/01/2012	01/01/2015	18.75	150.00
<input type="checkbox"/>					Bi-Weekly	PTO	Personal	3	Ross	Gellar	Active	No	02/01/2012	01/01/2016	1.00	8.00
<input type="checkbox"/>					Bi-Weekly	PTO	Floating Holiday	3	Ross	Gellar	Active	No	02/01/2012	01/01/2016	2.00	16.00
<input type="checkbox"/>					Bi-Weekly	PTO	Sick	3	Ross	Gellar	Active	No	02/01/2012	01/02/2016	10.00	80.00
<input type="checkbox"/>					Bi-Weekly	PTO	Vacation	4	Chandler	Bing	Active	No	01/09/2012	06/09/2015	6.25	50.00
<input type="checkbox"/>					Bi-Weekly	PTO	Personal	4	Chandler	Bing	Active	No	01/09/2012	01/01/2016	1.00	8.00
<input type="checkbox"/>					Bi-Weekly	PTO	Floating Holiday	4	Chandler	Bing	Active	No	01/09/2012	01/01/2016	2.00	16.00
<input type="checkbox"/>					Bi-Weekly	PTO	Sick	4	Chandler	Bing	Active	No	01/09/2012	01/02/2016	10.00	80.00
<input type="checkbox"/>					Bi-Weekly	PTO	Vacation	5	Joey	Tribiani	Leave of Absence	No	01/09/2012	06/09/2015	6.25	50.00

- As in other reports, you have the ability to export this report by clicking the *Export* link.
- This page has many options for processing and managing accruals. They are described below.

REPORTS

The Time & Labor Module offers extensive reporting options and capabilities for you to gather and present labor-related data in a variety of ways. Since all Time & Labor Module reports follow similar creation procedures, general guidelines that apply to all reports are provided below.

In this section:

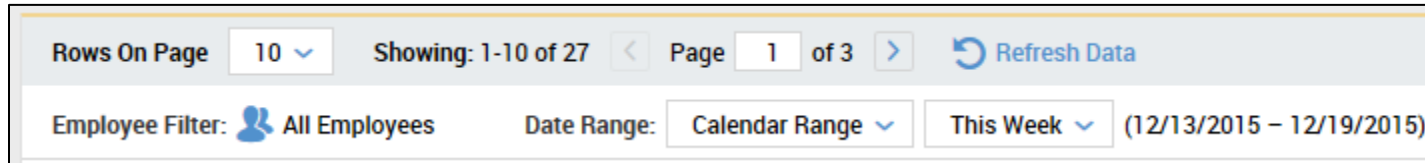
- Defining Report Settings
- Report Definitions
- Report Custom Settings

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DEFINING REPORT SETTINGS

Select the report you want to run from the **My Reports** menu.

This will launch a page for the report you selected, where you can choose the data to be included in the report. At the top of each report are options to control who is included in the report, dates and time periods for the data to be included in the report, and various other options. Below are descriptions of these options.

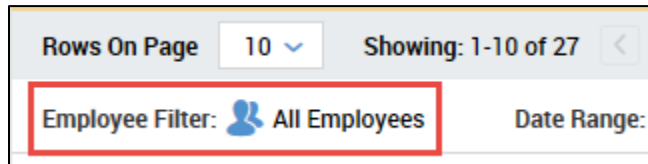


The screenshot shows a report settings interface. At the top, there is a pagination bar with 'Rows On Page' set to 10, 'Showing: 1-10 of 27', 'Page 1 of 3', and a 'Refresh Data' button. Below this, there is a filter section with 'Employee Filter' set to 'All Employees' (indicated by a person icon), 'Date Range' set to 'Calendar Range', and 'This Week' (12/13/2015 – 12/19/2015).

In this section:

- Selecting Employees for the Report
- Selecting Dates for the Report
- Customizing the Report Columns
- Sorting the Columns
- Saving Report Settings
- Exporting Report Output
- Exporting Date-Specific Reports to Mail Calendar Clients
- Sharing Saved Settings with Other Users
- Viewing Other User Report Settings
- Running the Report

SELECTING EMPLOYEES FOR THE REPORT



The screenshot shows the same report settings interface as before, but with a red box highlighting the 'Employee Filter' section, which is set to 'All Employees' (indicated by a person icon). The 'Date Range' is also visible, set to 'Calendar Range'.

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EMPLOYEE FILTER

By default, all employees will be included in the report. To change who is included in the report, click the Employee icon. The **Employees Filter** screen displays.

Employees Filter

NOT SELECTED

SELECTED (0)

SAVED LISTS

COMPANY GROUPS

COMPANY PROFILES

ADVANCED FILTERS

Rows On Page 10 1-10 of 25 Page 1 of 3

	EMPLOYEE ID	BADGE	USERNAME	FIRST NAME	LAST NAME	IN PAYROLL	LOCKED	UNIF
<input type="checkbox"/>	=	=	=	starts with	starts with	All	All	=
<input type="checkbox"/>	1		mgellar	Monica	Gellar	Yes	No	
<input type="checkbox"/>	2		rgreen	Rachel	Green	Yes	No	
<input type="checkbox"/>	3		rgellar	Ross	Gellar	Yes	No	
<input type="checkbox"/>	4		cbing	Chandler	Bing	Yes	No	
<input type="checkbox"/>	5		jtribiani	Joey	Tribiani	Yes	No	
<input type="checkbox"/>	6		pbuffet	Phoebe	Buffet	Yes	No	
<input type="checkbox"/>	7		rgrimes	Rick	Grimes	Yes	No	
<input type="checkbox"/>	8		jlannister	Jaimie	Lannister	Yes	No	
<input type="checkbox"/>	9		jsnow	Jon	Snow	Yes	No	
<input type="checkbox"/>	10		mgreene	Maggie	Greene	Yes	No	

USE FILTER

ADD SELECTED

SAVE LIST AS

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There are six tabs that can be used to select employees for the report. The tabs are used as follows:

- **Not Selected** – This tab lists all employees to which you have access. These employees are used to populate the Selected tab. Check the employees to include and click **Add Selected**.
- **Selected** – This list is the result of the employees that were added from the *Not Selected* list. To remove specific employees, click the **X** to remove them. You can also save employee lists by clicking the **Save List As** button. To apply the list from the tab, click the **Use Filter** button to apply it to the report.

Employees Filter

NOT SELECTED **SELECTED (5)** SAVED LISTS COMPANY GROUPS COMPANY PROFILES ADVANCED FILTERS

Rows On Page 10 5 Rows

		EMPLOYEE ID	BADGE	USERNAME	FIRST NAME	LAST NAME	IN PAYROLL	LOCKED	UNI	
<input type="checkbox"/>		=	=	=	starts with	starts with	All	All	=	
<input type="checkbox"/>	×			6		pbuffer	Phoebe	Buffer	Yes	No
<input type="checkbox"/>	×			1		mgellar	Monica	Gellar	Yes	No
<input type="checkbox"/>	×			3		rgellar	Ross	Gellar	Yes	No
<input type="checkbox"/>	×			2		rgreen	Rachel	Green	Yes	No
<input type="checkbox"/>	×			5		jtribiani	Joey	Tribiani	Yes	No

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- **Saved Lists** – This tab contains all of the saved employee lists from the *Selected* tab. To apply these saved lists, click the **Flag** icon next to the list to be applied.

Employees Filter

NOT SELECTEDSELECTED (5)SAVED LISTSCOMPANY GROUPSCOMPANY PROFILESADVANCED FILTERS

Rows On Page105 Rows[Default]

LIST NAME

SIZE

CREATED

=

=

=

Emps 1-3

3

04/23/2014 10:37a

EE 5-16, except 6 & 13

11

07/10/2014 04:03p

Emp 1-5

5

05/08/2015 02:20p

Lorrie's List

5

09/03/2014 02:44p

List 1

5

12/17/2015 08:55a

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- **Company Groups** – If you have groups defined within your company, they will display here automatically. To filter a report by a group, click the Flag icon next to the group.

Employees Filter

NOT SELECTEDSELECTED (5)SAVED LISTSCOMPANY GROUPSCOMPANY PROFILESADVANCED FILTERS

Rows On Page108 Rows[Default]

GROUP TYPE	GROUP NAME	# MEMBERS
=	starts with	=
System	All Company Employees	27
Manager	Monica Gellar	7
Manual	Warehouse	3
Manual	Alan Stone's Group	4
Manual	Manager Group	4
Manager	Lisa A. Brown	4
Manual	IT Group	6
Filter Based	Training Group	4

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- **Company Profiles** – This tab contains all of the profiles that are defined within your company. You can filter a report based on these profiles. Click the Flag icon next to the profile to be applied to your report.

Employees Filter				
<div> NOT SELECTED SELECTED (5) SAVED LISTS COMPANY GROUPS COMPANY PROFILES ADVANCED FILTERS </div>				
<div> <div> Rows On Page 10 1-10 of 21 Page 1 of 3 </div> <div> [Default] </div> </div>				
PROFILE/POLICY	NAME	# EMPLOYEES	DESCRIPTION	
=	=	=	=	
Timesheet Profile	Bulk Hours	1		
Timesheet Profile	Start/Stop	19		
Timesheet Profile	Time Stamp	1		
Timesheet Profile	Graph (Old)	1		
Timesheet Profile	Start/End (All Days) 2	1	Start/End Timesheet (All Days)	
Timesheet Profile	Punch Clock	1	Punch Clock	
Security Profile	Employee	20	Limited access to time entry and accrual information	
Security Profile	Payroll Admin	1	Payroll Admin -- Access to all functions	
Security Profile	SaaShr Admin	1		
Security Profile	Manager	4	Managers	

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- **Advanced Filters** – This tab allows you to configure your own filters based on elements that are configured within your company. (i.e., such as Account Status, Default Shift, etc.) You can build an advanced filter by adding an element, highlighting it, and then clicking one of the logical operators below (And, Or, Not). You can delete one of the additions by highlighting it and clicking Delete. To use the filter once you are done creating it, click the Flag icon. These filters are not able to be saved. They must be created each time you use them.

The screenshot shows the 'Employees Filter' dialog box with a close button (X) in the top right corner. At the top, there are six tabs: 'NOT SELECTED', 'SELECTED (7)', 'SAVED LISTS', 'COMPANY GROUPS', 'COMPANY PROFILES', and 'ADVANCED FILTERS'. The 'ADVANCED FILTERS' tab is currently selected. Below the tabs, there is a filter construction area. It starts with a white box containing the word 'AND'. To its right, there are two filter items stacked vertically. The first item is 'Account Status' with a dropdown menu showing 'Active'. The second item is 'Employee Pay Type' with a dropdown menu showing 'Hourly'. Below these items, there are four buttons: 'AND', 'OR', 'NOT', and 'DELETE'. At the bottom left of the dialog box, there is a blue button labeled 'USE FILTER'.

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Once one of the employee filters has been applied, the report header will display which filter is in use. To delete the filter click the Clear option next to the Employee Filter in use.

Employees Filter

NOT SELECTED SELECTED (5) SAVED LISTS COMPANY GROUPS COMPANY PROFILES ADVANCED FILTERS

AND

Default Department: Engineering/Interface Developers Include Subtree ☐

Default Location: Austin Include Subtree ☐

AND OR NOT DELETE

Rows On Page: 10 No Rows Refresh Data

Employee Filter: Advanced Filter [Clear](#) Date Range: Calendar Range This Week (12/13/2015 – 12/19/2015)

EMPLOYEE ID	FIRST NAME	LAST NAME	SUN DEC 13	MON DEC 14
-------------	------------	-----------	---------------	---------------

SELECTING DATES FOR THE REPORT

1-10 of 27 Page 1 of 3 Refresh Data

Date Range: Calendar Range This Week (12/13/2015 – 12/19/2015)

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DATE RANGE

There are many options to include data from the past, present and future. You can also choose time periods by pay period and customized expressions. Descriptions of these options are listed below.

- The first **Date Range** field will allow you to choose the following options:
 - Calendar Range
 - Date Range
 - Pay Period
 - Expression
- The second **Date Range** field works in conjunction with the first option, as follows:
 - If **Calendar Range** is selected – A drop-down list of choices is available, including Current, Past, Future, and To Date are listed.

The screenshot shows the 'Date Range' field set to 'Calendar Range'. A dropdown menu is open, displaying the following options: 'Current' (with a sub-option 'This Week' selected and marked with a checkmark), 'This Month', 'Past' (with sub-options 'Last Week' and 'Last Month'), 'Future' (with sub-options 'Next Week' and 'Next Month'), and 'To Date'. The background shows a table with columns for 'ME', 'LAST NAME', and 'MON DEC'.

- If **Date Range** is selected – Two calendar fields will display, allowing you to enter your own From and To date ranges.

The screenshot shows the 'Date Range' field set to 'Date Range'. Below the field, two calendar fields are displayed: 'From: 12/13/2015' and 'To: 12/19/2015'. The interface also includes a 'Page 1 of 3' indicator and a 'Refresh Data' button.

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- **Pay Period** is selected – Two fields will display. The first field allows you to select a pay period that is Current, Next, Previous or Date (specific date). The second field allows you to select the pay period to be used.

Date Range: **Pay Period** **Current** Profile: **Bi-Weekly** (12/14/2015 – 12/27/2015) ☐ Only Display Employees In This Pay Period

ME LAST NAME **Current** **Next** **Previous** **Date**

th starts with = = = = =

SUN DEC 13 MON DEC 14 TUE DEC 15 WED DEC 16 THU DEC 17

- If **Expression** is selected – Two expression and logic fields will display where you can click the expression icon and choose from a list of pre-defined expression value that will complete the entries.

Date Range: **Expression** From: **MonthStart(Today("CDT"))** 12/01/2015 To: **MonthEnd(Today("CDT"))** 12/31/2015

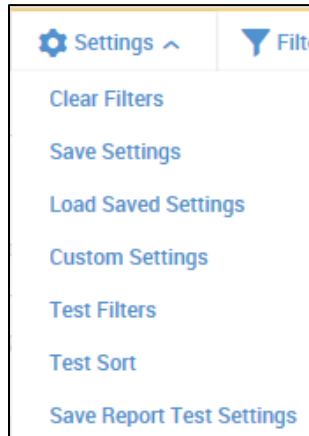
Available Expressions	
COMPARISON AND LOGIC FUNCTIONS	EXAMPLE
Eq (text1,text2)	Eq("1","1") = true
If (test_value,value_if_true,value_if_false)	If(Eq(1,1),"10","20") = 10
In (val_to_find,in_val1,in_val2,...,in_valN)	In("10","5","10","20") = true
Max (num1,num2)	Max(50000,60000) = 60000
Min (num1,num2)	Min(50000,60000) = 50000
Not (value_to_negate)	Not(Eq(1,1)) = false
Or (logical1,logical2)	Or(Eq(1,1),Eq(1,0)) = true
DATE FUNCTIONS	EXAMPLE
AddDays (date,n)	AddDays("1/1/2011",20) = 1/21/2011
AddMonths (date,n)	AddMonths("1/31/2011",1) = 2/31/2011
AddWeeks (date,n)	AddWeeks("1/1/2011",1) = 1/8/2011
AddYears (date,n)	AddYears("1/31/2011",1) = 1/31/2012

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CUSTOMIZING THE REPORT COLUMNS

You can control many areas of your report by using the standard report options at the top of the page of each report. Options include:

- **Full Screen** – Click to display the session in full screen mode which will hide the headers and menus at the top of the session. To return to the normal view, click the Close Full Screen option.
- **Default** – The session defaults to the system default view. If you have saved view, they will display under the drop-down and can be selected.
- **Settings** – This drop-down contains options to control filters, save settings (views), load settings (views), create custom settings, test filters, test sort, and the ability to save report test settings.



- **Filter** – Clicking this option acts as a toggle to hide/show the Employee Filter and Date Range options.
- **Select Columns** – Allows you to add/remove columns from the selected report.
- **Export** – Allows for the exporting of the report in various formats, such as CSV, Excel, PDF, HTML, XML, and Text.

Within any report where you can add or remove columns, you have the ability to search for particular data, using the **Available Columns** search field. To use the search capabilities, follow these guidelines:

- Click the magnifying glass icon and the search field will become active. Search parameters are flexible, and you can enter one or several key words to find a column.
- To add a column, click an option in the “Available Columns” section and click the forward arrows to move it to the “Selected Columns” section.

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- To remove a column, click an option in the “Selected Columns” section and click the backward arrows to move it to the “Available Columns” section.
- To move the order of the selected columns, you can select the double up-arrow or double down-arrow to skip multiple lines to the top or bottom of the list. The single arrows move the selection up/down one line at a time.
- When the selections are complete, click the **Select Columns** button to activate the view.

Select Report Columns

Available Columns

Employee: Username

Employee: Status

Employee: Email

Employee: Uniform Size

Employee: Uniform Size Effective Date From

Employee: Preferred Language

Employee: Preferred Language Effective Date From

Employee: Default Follow up with client

Employee: Default Duration Type

Employee: Security Profile

Selected Columns

Employee: Employee Id

Employee: First Name

Employee: Last Name

[Day Info]

SELECT COLUMNS

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SORTING THE COLUMNS

To format and reorganize the report output, there are several options you can use. Example: To filter specific data from the report output, you can use the filter fields at the top of the columns of the report.

To group information, hover your mouse over the column and the grouping options will display. Click the **G** that appears above the column heading for the data type you want to group. Make your grouping selections. To remove or hide columns from the report output, click the Ungroup link that appears next to any employee in the list. You can also click your Default view under the *Default* drop-down in the header.

The screenshot displays the top section of the Kronos Workforce Ready Manager interface. At the top, there is an 'Employee Filter' section with a dropdown menu set to 'All Employees' and a 'Custom Filter' button labeled 'ADD NEW'. Below this is a row of column headers: 'EMPLOYEE ID' and 'BADGE'. Each header has a small 'G' icon and a dropdown arrow. Below the headers are two filter input fields, each with an equals sign and a dropdown arrow. The main table below has columns for 'EMPLOYEE STATUS', 'IN PAYROLL', and 'LOCKED'. The 'EMPLOYEE STATUS' column has a dropdown menu with 'Terminated' selected. The 'IN PAYROLL' column has a dropdown menu with 'Yes' selected. The 'LOCKED' column has a dropdown menu with 'All' selected. The table lists several employees with their details: Employee Id, Badge, Username, First Name, Last Name, and a link to 'UNGROUP'. The employees listed are Lisa Brown, Lorrie Cook, Gabrielle Victory, and Alan Stone.

Employee	Employee Id	Badge	Username	First Name	Last Name	UNGROUP
<input type="checkbox"/> Active	7900		lisa.brown	Lisa	Brown	
<input type="checkbox"/> Active	7899		lorrie.cook	Lorrie	Cook	
<input type="checkbox"/> Active	2000	56129856	gvictory	Gabrielle	Victory	
<input type="checkbox"/> Active	1000	1001	alan.stone	Alan	Stone	

Each column may be sorted in either ascending or descending order by using the up and down arrows at the top of each column. Click the up arrow to sort the column in ascending order. Click the down arrow to sort the column in descending order.

This close-up shows the column headers 'EMPLOYEE ID', 'FIRST NAME', and 'LAST NAME'. Each header has a small 'G' icon and a dropdown arrow. A mouse cursor is hovering over the 'G' icon for 'EMPLOYEE ID'.

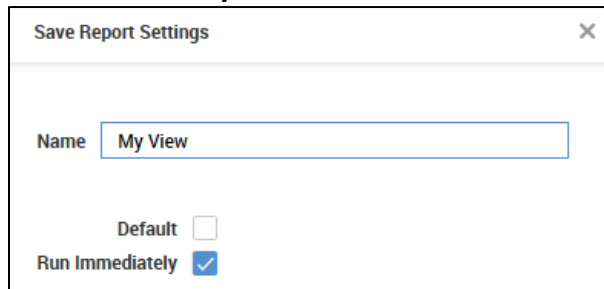
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SAVING REPORT SETTINGS

You can save commonly used report settings for use in running subsequent reports.

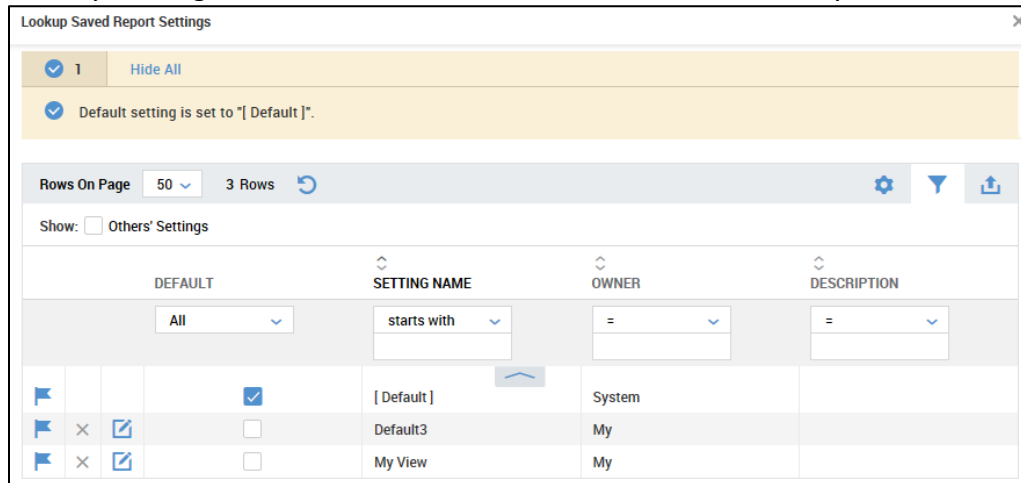
To save report settings, do the following:

1. Ensure your report settings are configured to your liking.
2. Under the **Settings** drop-down choose **Save Settings**.
3. Provide a name for the settings. If you want this setting to be your default report setting, click the **Default** check box, and then click the **Save** button. For any report where you have to click Run to execute, you have the option of overriding this setting by checking **Run Immediately**.



The 'Save Report Settings' dialog box contains a 'Name' field with the text 'My View'. Below the field are two checkboxes: 'Default' (unchecked) and 'Run Immediately' (checked).

4. You can easily run the report with the saved settings. Under the Settings drop-down choose **Load Save Settings** and click the Flag icon next to the setting you want to run. The screen will update with the saved settings. You can also determine the default view here by clicking the checkbox in the default column of the view you wish to make the default.



The 'Lookup Saved Report Settings' dialog box displays a table of saved settings. At the top, it shows '1' settings and a 'Hide All' button. A message states 'Default setting is set to "[Default]"'. The table has columns for 'DEFAULT', 'SETTING NAME', 'OWNER', and 'DESCRIPTION'. The 'DEFAULT' column has a dropdown menu set to 'All'. The 'SETTING NAME' column has a dropdown menu set to 'starts with'. The 'OWNER' column has a dropdown menu set to '='. The 'DESCRIPTION' column has a dropdown menu set to '='. The table lists three settings: '[Default]' (System), 'Default3' (My), and 'My View' (My). The '[Default]' setting has a checked checkbox in the 'DEFAULT' column.

DEFAULT	SETTING NAME	OWNER	DESCRIPTION
All	starts with	=	=
<input checked="" type="checkbox"/>	[Default]	System	
<input type="checkbox"/>	Default3	My	
<input type="checkbox"/>	My View	My	

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EXPORTING REPORT OUTPUT

You can export report results to external file formats, as shown in the example below.

To export a report output, do the following:


1. Click the **Export** option in the header. You can also specify if you would like your report to have an *Information Header* that lists how the report is sorted, grouped, and who generated it.

Export Report

Available Export Formats

.csv	CSV	Comma Delimited	.csv
.xls	Excel	Microsoft Excel	.xls
.xls	Excel (Hours as decimal)	Microsoft Excel	.xls
.pdf	PDF	Acrobat Reader	.pdf
.html	HTML	HTML Table	.html
.html	HTML (Paged)	HTML (Paged)	.html
.xml	XML	XML	.xml
.txt	Text	Fixed Width	.txt
.txt	Text (Tab Delimited)	Tab Delimited	.txt

☒ **Display Information Header/Footer**

 **If You Have Problem Opening File By Clicking On The Format Above, Do The Following:**

1. Right Click Desired Format And Choose 'Save Target As ...'
2. Save File To Disk
3. Open Saved File

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RUNNING THE REPORT

Once you have configured the settings for your report, there are a few other settings to consider before running the report.

- **Rows On Page** – In some reports, you may not see all of the data on the page due to the rows not being visible due to being on the next pages. To change this setting, click the drop-down list in the Rows On Page drop-down. Up to 200 rows may be selected on most reports.

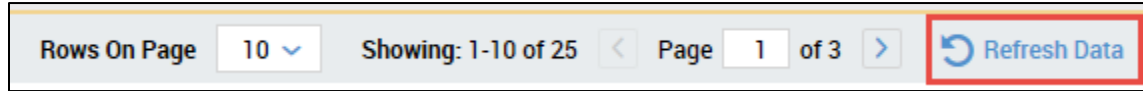
Rows On Page	10 ▾	8
Employee Filter:	✓ 10	
	15	
	20	
	50	
	100	
	200	

- **All Checkbox** – To control the data included in the report run, you can click the checkbox under the Employee Filter areas to select all employees on the page.

Rows On Page	200 ▾	25 Rows	Refresh Data
Employee Filter:	All Employees	Custom Filter:	
<input checked="" type="checkbox"/>	EMPLOYEE ID	BADGE	
	=	=	
<input checked="" type="checkbox"/>	1000	1001	
<input checked="" type="checkbox"/>	30		
<input checked="" type="checkbox"/>	4		
<input checked="" type="checkbox"/>	13		

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- **All and Page** – To control the data included in the report run, you can click *All* to include all of the data, even though that data may encompass multiple pages. Or, you can click *Page* to include only the information visible on the first page. This option is not available on all reports.



- **Run** – To run any report, click the **Refresh Data** button.

