UKG Workforce Pro

Time and Attendance Management



How to Guide for Managers/Time Approvers

Maryland-National Capital Park and Planning Commission

Managers/Time Approvers, please use the How-to for All Staff to learn how to do your own Timecards and Time-Off Requests. This How-to is specifically for Manager/Time Approver responsibilities.

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How can I get help?

Submit a ticket on OnPoint EOB for UKG/Kronos. Once you complete the ticket, your information will be sent immediately to the correct office to address your problem or issue.

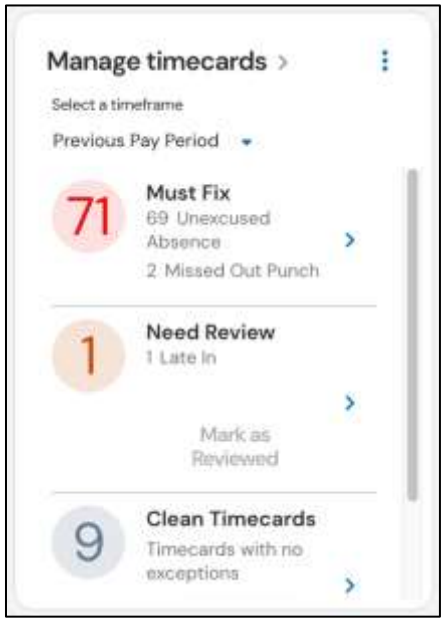
How to complete an ONPOINT ticket:

1. Go to https://mncppconpoint.service-now.com/mncppc
2. Next, click on the ONPOINT icon on the right side of the page.
3. Then, click Create Ticket.
4. Select Category UKG/Kronos.
5. Your subcategory selection will be based on your issue, whether it's something broken, like a clock, or whether you are requesting something new, such as a request for reports.
6. Fill in Title of Issue.
7. Finally, complete Description of Issue.

Section 1. Taking Action on Employees' Timecards

How do I find my employees' Timecards to review?

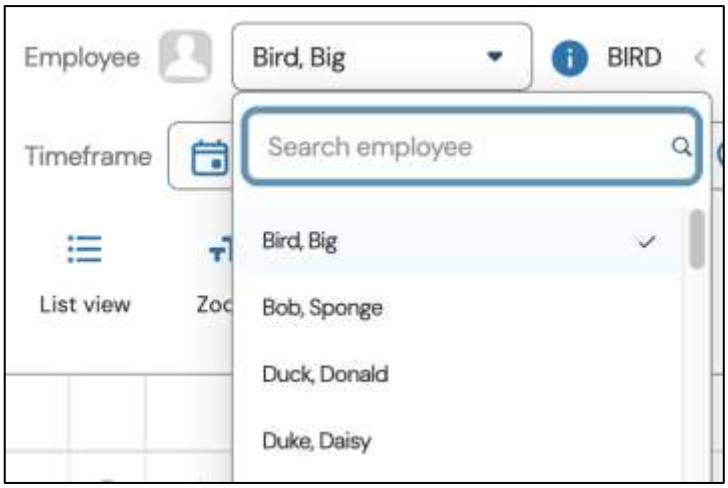
On the **Home** page, look at the **Manage timecards** tile for all people who report to you. Review the alerts (also called at a glance) for key information. Click on the title **Manage timecards** to review timecards by employee.



Tip

The alerts noted as Must Fix show you punch transactions that came in for you to address. The alerts noted as "Clean Timecards" are Timecards with no exceptions. Even though you can Approve All from there, you should review them first.

To pick one employee at a time to review, or to search for a specific employee, use the **down arrow** to the right of the first name on the top left of your screen. The **down arrow** will open a drop-down menu.



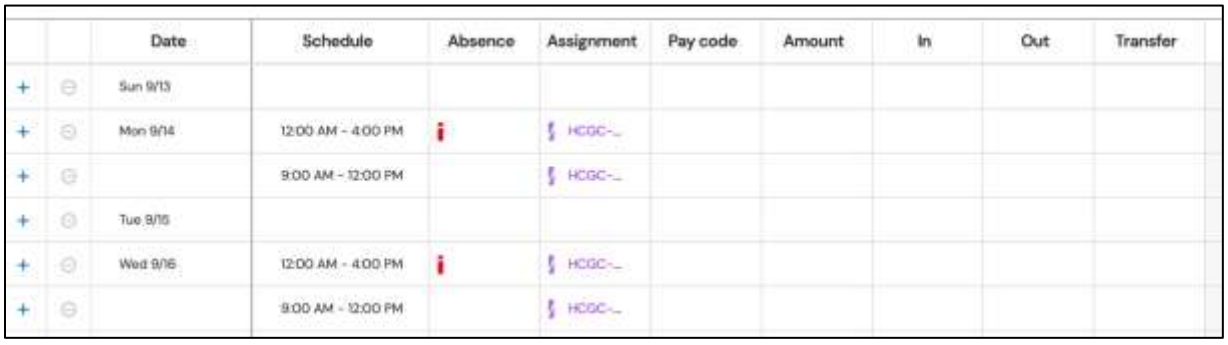
Tip

Employees are listed in alphabetical order by last name.

As an alternative, you can cycle through each employee one by one, by using the **right and left arrows** on either side of your employee count. (*Note: the example employee count in the screenshot below is 1 of 23.*)



For hourly employees who punch the clock, you will see the **hourly view Timecard**. It should look familiar to you.



Tip

In the Hourly view Timecard, you will see a column called Absence. It will not be used in this system. Please ignore it.

If you are an employee assigned online access to the UKG system for the purpose of adding your hours worked, you will see the **Project view Timecard**.



I wonder: What are the rounding rules for punch actions in the system?

They are the same as they were in the prior system. You can view them from the Employees' Timecards by right clicking on any In or Out punch. You will see a pop-up called **Punch Actions** that shows the rounded times.



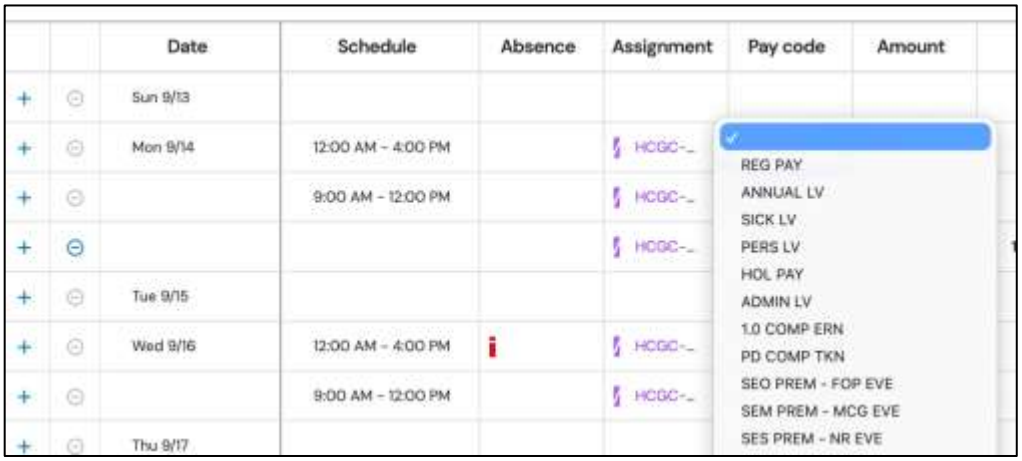
I wonder: What if an employee's shift spans two days?

The hours belong to the date on which they were worked, as was true in the prior system.

How do I make a Pay code edit on a Timecard?

From the **Hourly Timecard view**, find the **Pay Code** column. Click in the cell for the date you want to add time to.

Select the appropriate **Pay Code** from the drop-down menu.



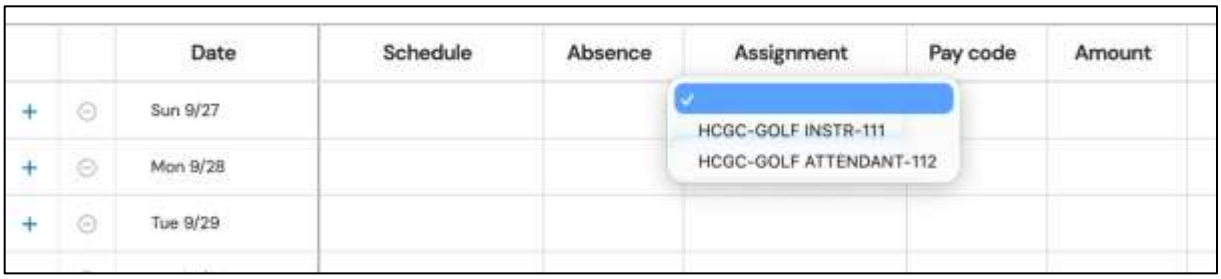
In the **Amount** column on the same row, type the number of hours to add to that Pay Code.

As soon as you add or edit any cell, the **Save** button in the upper right corner will turn purple. Click on it to save your work.



How do I make a Pay Code edit for employees with multiple assignments or positions?

From the **Hourly Timecard view**, find the line for the date where you want to make a Pay Code edit (e.g., sick leave). For employees with multiple assignments or positions, click in the **Assignment** column to select the desired assignment or position from drop-down menu. Assignments are listed in order of position level. The primary assignment is on top.



In the **Pay Code** column, select the appropriate Pay Code edit (e.g., Sick Leave), then enter the amount of hours in the **Amount** column.

Date	Schedule	Absence	Assignment	Pay code	Amount
Sun 9/27			HCGC-GOLF INST...	SICK LV	4:00
Mon 9/28					

Tip

Employees can only charge sick leave for hours they are scheduled to work.

How do I make Timecard edits for punch transactions?

Tip

You must not edit the punch transactions in the In and Out columns.

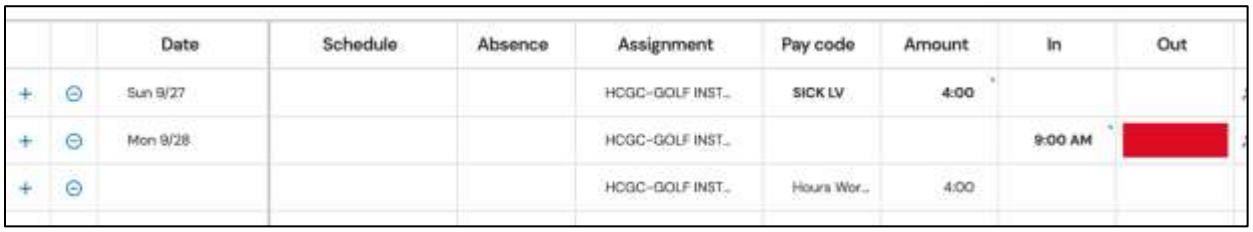
On the **Hourly Timecards view**, select the name of the employee from the Employee drop-down list in the upper left corner of the screen and find the transaction to edit.



Next, click the **"+"** to the left of the date. This will add a **new row** under the date to make edits. In this example, we need to edit the duration of hours worked.



For employees with multiple assignments or positions, click in the **Assignment** column to select the desired assignment or position from drop-down menu. In the **Pay Code** column, select **Hours Worked** and enter the amount of hours in the **Amount** column. When finished click the **Save** button.



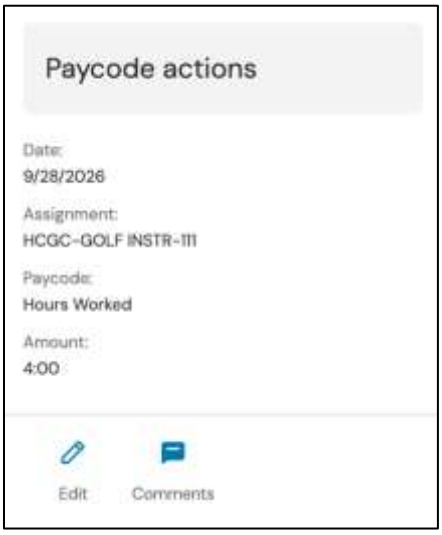
Tip

When you make a timecard adjustment or edit, you should include a comment.

How do I add a comment to a transaction?

Comments are short, predefined descriptions that you can add to punches, exceptions, or transactions. You should add a comment to a transaction any time you make a timecard adjustment or edit.

To add a comment, right-click on the desired transaction. In this case, we will right-click on the Amount of hours (4:00) we previously added due to the missed out-punch. From the **Pay Code Actions** panel, select **Comments**.



In the **Comments** panel, select a comment from the **"Select a comment"** drop-down list. If desired, you can also add additional text in the **"Type a note"** box. Next click the **Add** button.



When finished, click the **Apply** button at the bottom of the **Comments** panel.



Tip

You can add more than one comment and note to the same punch by clicking the Add button.

On the **Hourly Timecards screen** select **Save** to save your edits. **Comments** appear on the timecard with a blue bubble indicator on the transaction.

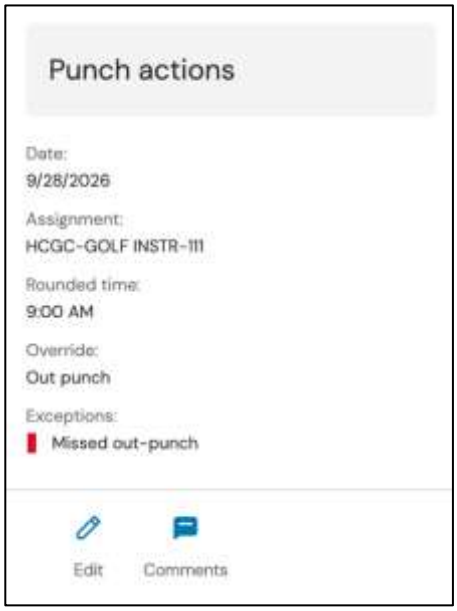


How do I add an optional note to an Exception Error?

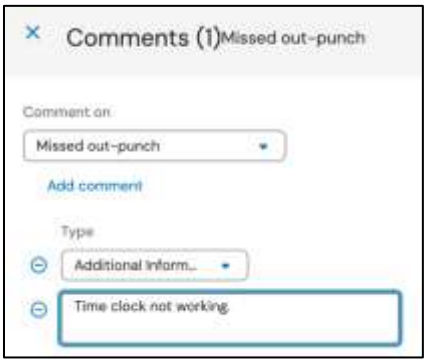
If a transaction has an exception error, an associated comment will be assigned to the transaction automatically.

To see the exception error and add an optional note, right-click on the punch with the exception. In the **Punch Actions** panel, you will see the exception error. In this case the error is, **"Exceptions: Missed out-punch."**

If you would like to add an optional note, select **Comments** from the Punch actions panel.



On the **Comments** panel, you will notice the **"Comment on"** drop-down box is automatically populated with the exception error, **"Missed out-punch."** If you would like to add an optional comment, select a Comment from the **drop-down list**. In the **"Type a note"** box, add any additional information.



When finished, click the **Apply** button at the bottom of the Comments panel.



On the Hourly Timecards screen select **Save** to save your edits. Comments appear on the timecard with a blue bubble indicator on the transaction.



How do I adjust punch transactions?

In some situations, you may need to adjust existing punch transactions. In this example, the employee punched out at 5:27 pm instead of 5:00 pm. The shift total shows 7 hours and 45 minutes due to the 30-minute break deduction and rounding rules.



To see the Rounded time, right-click on the punch out time. This will show you the actual time (5:27 pm) and the rounded time (5:15 pm).



To deduct the extra 15 minutes, **click the "+" to the left of the date** to add a new row under the date to make edits. For employees with multiple assignments or positions, click in the **Assignment** column to select the desired assignment or position from drop-down menu.

In the **Pay Code** column, select **Regular Pay (Reg Pay)** and enter the amount of hours in the **Amount** column. When finished, click the **Save** button. The daily total has now been adjusted by 15 minutes.



Tip

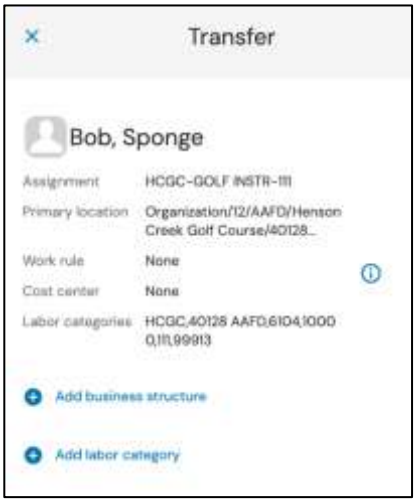
The "Regular Pay" Pay Code should only be used to make timecard adjustments. All hours worked should have the Pay Code "Hours Worked."

How do I transfer time To Account Unit or Activity Codes?

If you need to allocate time to a different **Labor Category** for hours worked, find the date that includes the hours worked for that day. Then go to the **Transfer Column** and select **Search**.



A pop-up called **Transfer** will appear on the right. Select **Add Labor Category**.



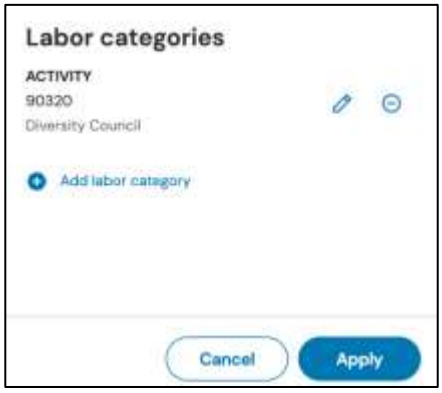
Tip

Labor categories include Account Unit codes and Activity Codes (Transfer Code/Labor Code). Depending on your role, you may only be able to access certain codes. What you see is based on your assignment or position and business needs. Please see the How-to for All Staff for adding a new Project to your own Timecard; you can use the same process to add a Project to an employee's Timecard.

In the **Transfer Labor categories** box, use the **drop-down arrows** to select the **Add Account Unit** or **Add Activity**, then click the OK button in the bottom right of the box.



When you return to the Transfer box, select the **Apply** button.



The **Transfer code** will now appear on the employee's timesheet.



Select the **Save** button to save the transfer.

How do I move amounts on an employee's Timecard?

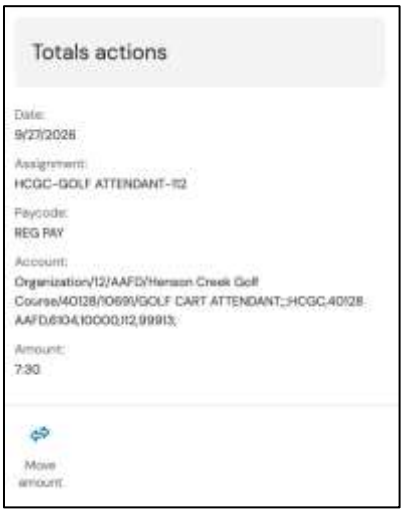
Go to the employee's Timecard, select the Timeframe for which you need to make a move. Select the **Totals** tab at the bottom of the page.



You will see information in the **Totals** tab. To move total amounts, be sure to set both drop-downs at the top left to **All** (as shown in the screenshot).



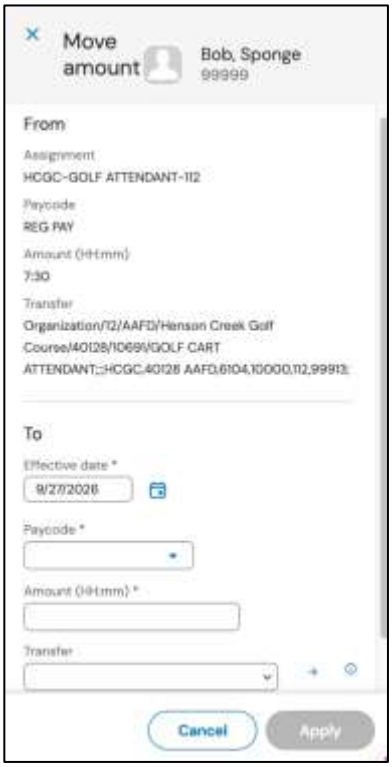
Right click on the **Pay Code** where you want to move total amounts from. You will see the pop-up for **Totals Actions**. Select **Move Amount** at the bottom.



Tip

If you are moving totals for a multi-job employee, the Assignment Grouping option must be selected. Also, amounts can only be moved within an assignment. Amounts cannot be moved from one assignment to another.

You will now see the **Move Amount** panel.



In the **To** area, enter the **Effective Date**, select a **Pay Code** from the drop-down menu, and enter an **Amount**.

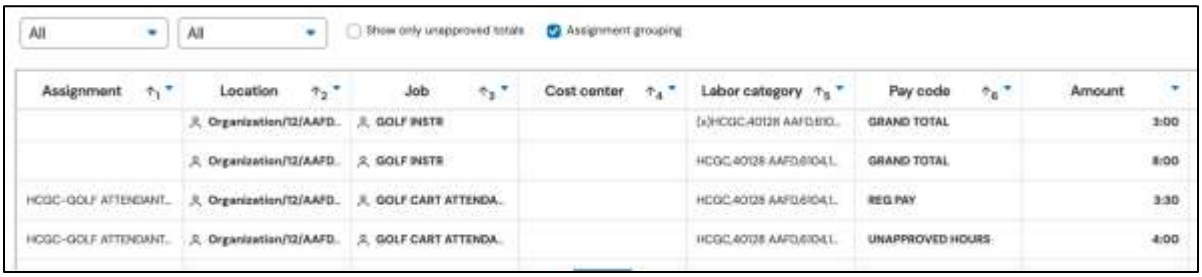
Tip

Effective dates must be within the selected Timeframe.

If you need to change the Account Unit or Activity that the time has been charged to, select **Transfer** from the most recently used list, or select the down arrow to open the Transfer pop-up.

You can also add **Comments** and **Notes**.

Select **Apply** at the bottom of the **Move Amount** pop-up. The screenshot below shows 4:00 unapproved hours in the **Pay Code** column before the Move.



A new row with the To information is added, unless there already is a Pay Code or Transfer of the same value in the Totals add-on. The From row is reduced by the amount moved. (*Note: The screenshot below shows that the 4:00 unapproved hours were transferred to a new Pay Code, 1.0 Comp Ern.)*



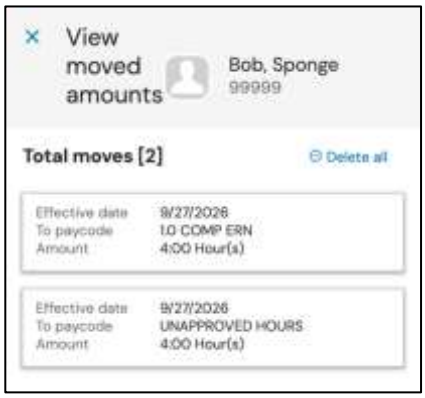
In the Timecard, as always, select **Save** in the upper right corner when it turns purple by clicking on it.

How do I view (or delete) the amounts I moved on an employee's Timecard?

Go to the selected Timeframe for which you want to view your Moved amounts. If there are any, you will see the **View Moved Amounts** in the Timecard toolbar.



Select **View Moved Amounts**. The **View Moved Amounts** pop-up opens with information about all the moved amounts for the selected Timeframe. These are listed in chronological order by the effective date.

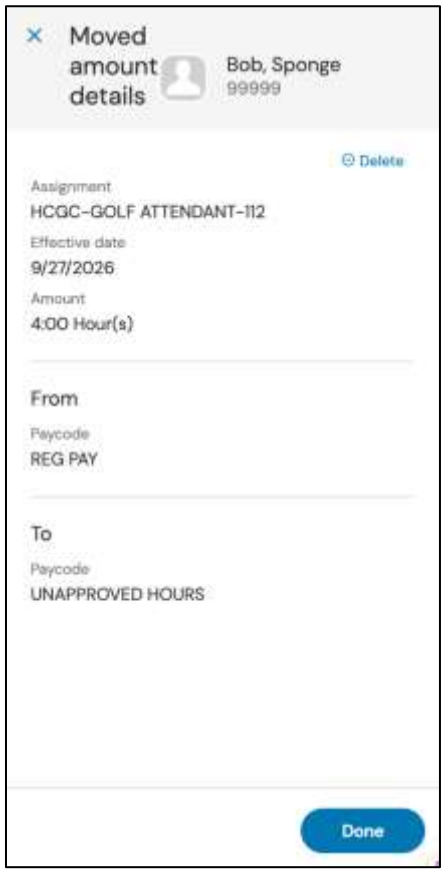


Tip

If you moved multiple amounts on the same effective day, they show in alphabetical order.

While you are in the View Moved Amounts pop-up, you can delete all the moved amounts by selecting **Delete All**.

To delete a specific moved amount, select the moved amount and then in the **Moved Amount Details** pop-up, select **Delete**. When finished, select the **Done** button.

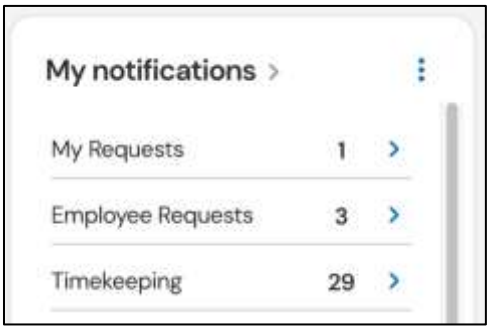


On the next screen, select **Apply**. Back in the Timecard view, click the **Save** button on the top right.

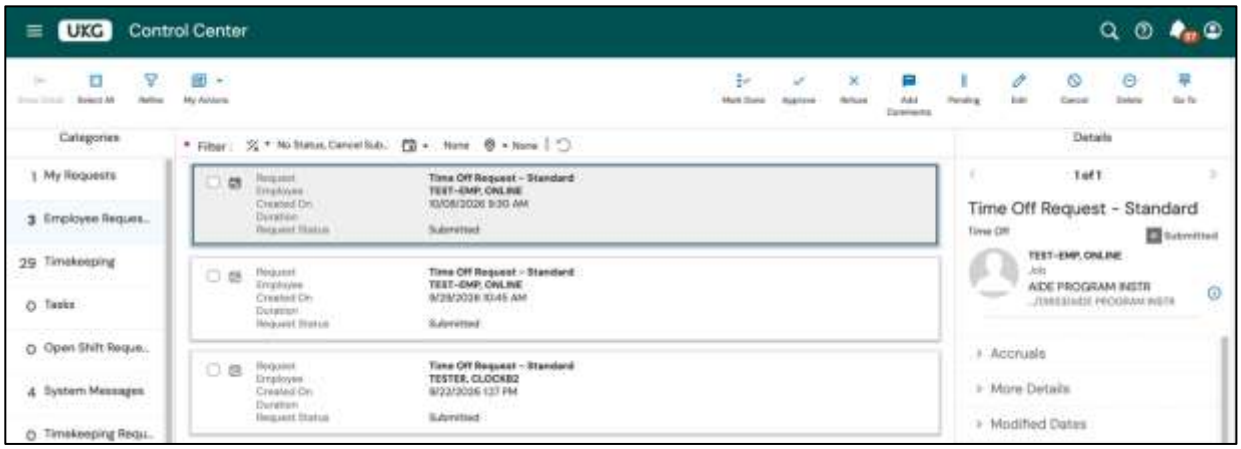
Section 2. Taking Action on Time-Off Requests

How do I review and respond to an employee's Time-Off (leave) Request?

Click on the **Employee Requests** option in **My Notifications** tile on your Home page (or the **Alarm** icon in the far-right top corner).



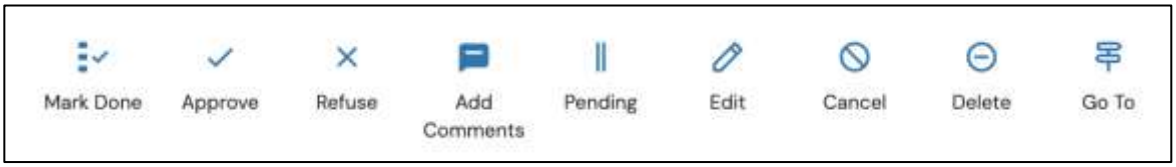
Then, the **Control Center** will open with all **Employee Requests**.



Click on the one you would like to review and respond to. You can review more information on the right side in the **Details** panel.

At the top of the page, you can take action to **Approve, Refuse, Add Comments,** put it on hold (**Pending**), **Edit, Cancel, or Delete**. Below are tips about those actions:

- When you **Approve** the Time-Off Request, it will pass through to the employee Timecard and cannot be edited or canceled there. You, as the Manager/Time Approver, would have to take action to edit it through the options above.
- You can **Cancel** a Time-Off Request if it was submitted by the employee in error.
- If you want to remove a Time-Off Request from your view, be sure you've canceled it first. Then, you can **Delete** it.



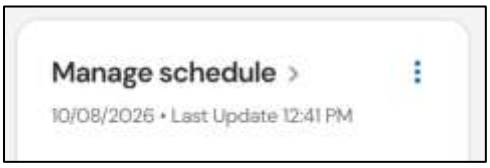
Tip

Deleting a Time-Off Request does not cancel it. It only removes it from your view.

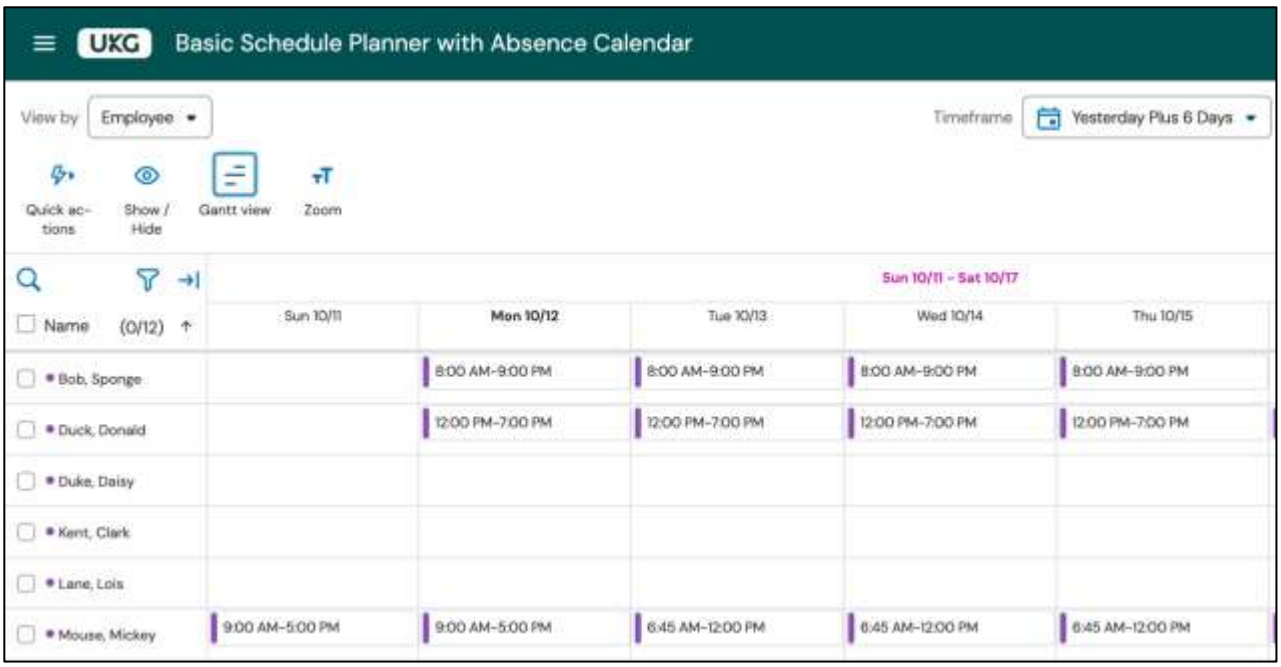
Section 3. Scheduling Employee's Time

How do I build a schedule for my employee's time?

You will see the **Manage Schedule** tile on your **Home** page. Click on the title **"Manage schedule"** to open the **Basic Schedule Planner**.



You will see the **Schedule grid** with a list of all your employees.



Tip

You will also see a tab at the bottom for the **Absence Calendar**. The **Absence Calendar** shows a dot to indicate the date the Time-Off Requests are submitted and approved. You must click the dot to see the details.

From the **Schedule grid**, you have four options for how you schedule. Each schedule option has a different purpose:

- Scheduling Option 1: To assign schedules in mass when you want to create or use known, recurring patterns and shifts.
- Scheduling Option 2: To assign schedules in mass when you want to use existing Schedule Groups.
- Scheduling Option 3: To assign schedules for one-time use.
- Scheduling Option 4: To assign schedules for one employee at a time, using Groups.

Each option is outlined in the following sections.

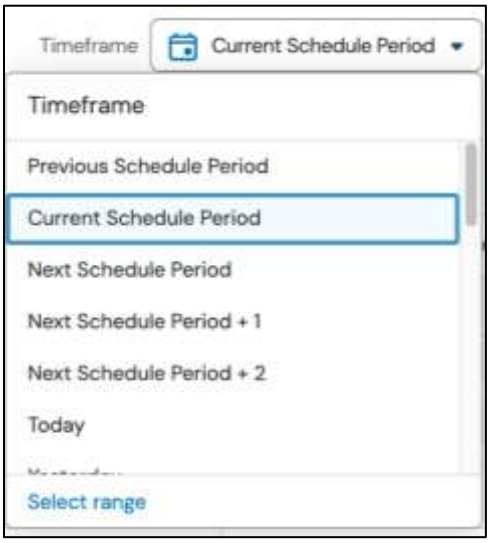
Tip

Regardless of which option you use, know that when you build a Schedule, the start date should be in line with the first day of the pay period, or the first day of the week in a work period.

Scheduling Option 1: Use a Schedule Pattern Template and/or a Shift Template from the Schedule grid.

Purpose: To assign schedules in mass when you want to create or use known, recurring patterns and shifts.

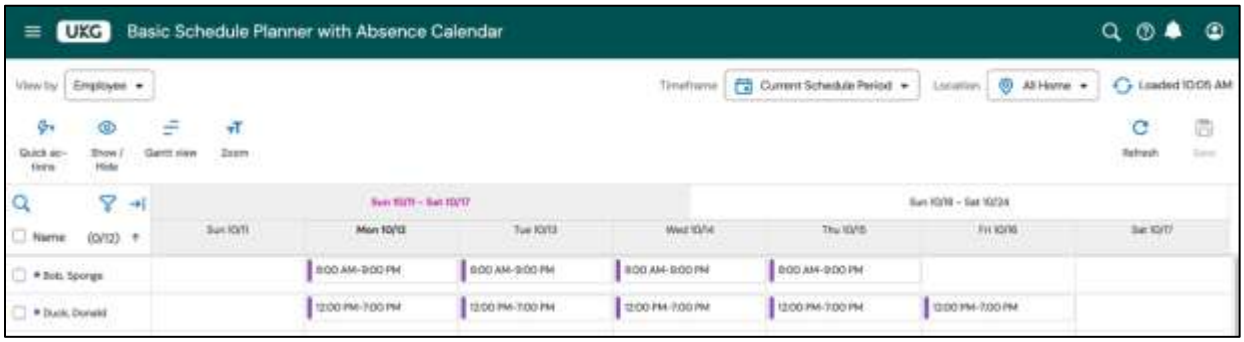
From the **Schedule grid**, click the down arrow next to the calendar button on the top left to navigate to the Timeframe you want to schedule for.



Tip

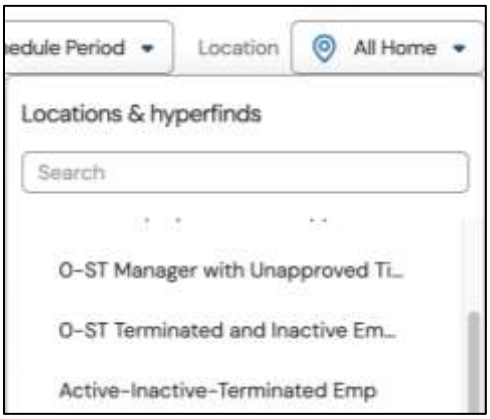
Schedule Period for the Schedule Planner with Absence Calendar is two weeks.

In the **Timeframe** you selected, you can view the **first week** or the **second week** by clicking the tabs at the top with the weekly dates on them.



Some Managers/Time Approvers use **Hyperfinds** to schedule people who are in similar groups or roles. To find your **Hyperfinds**, click on the **All Home** down arrow in the **Location** option on the top right of the screen.

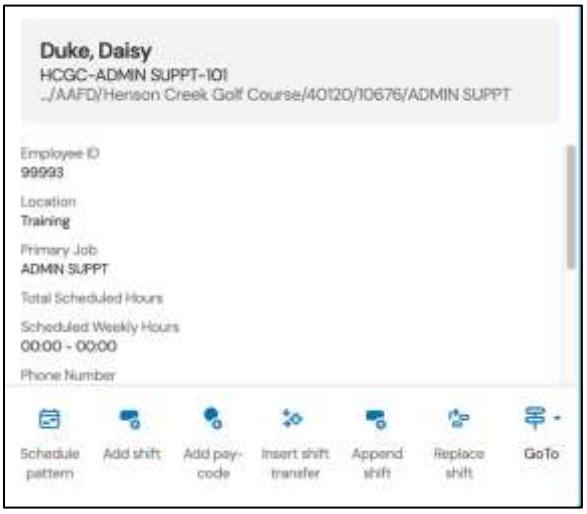
Locate and select the **Hyperfind** you want to use to filter your employee list.



Tip

To learn how to create your own Hyperfind, see Section 7.

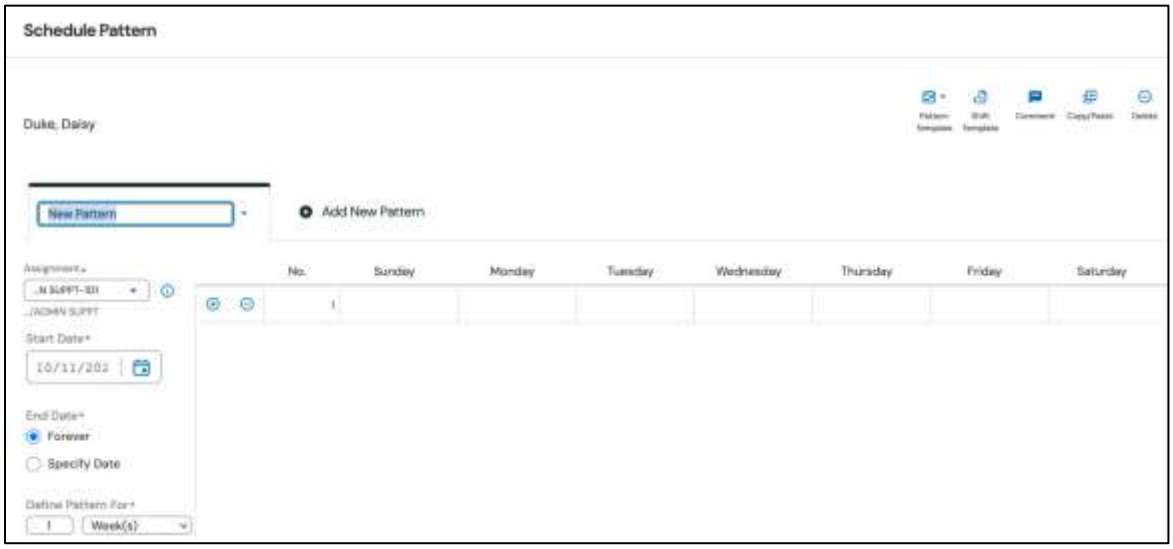
Next, **right click** on the **employee's name** to see your menu options for scheduling that employee. Click **Schedule Pattern**.



Tip

Most Managers/Time Approvers use the first two options in the menu in the above image: Schedule Pattern and Add Shift.

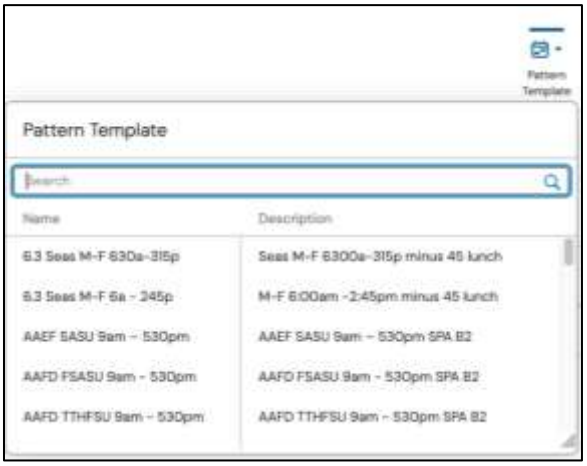
The **Schedule Pattern** dialog box will appear.



Tip

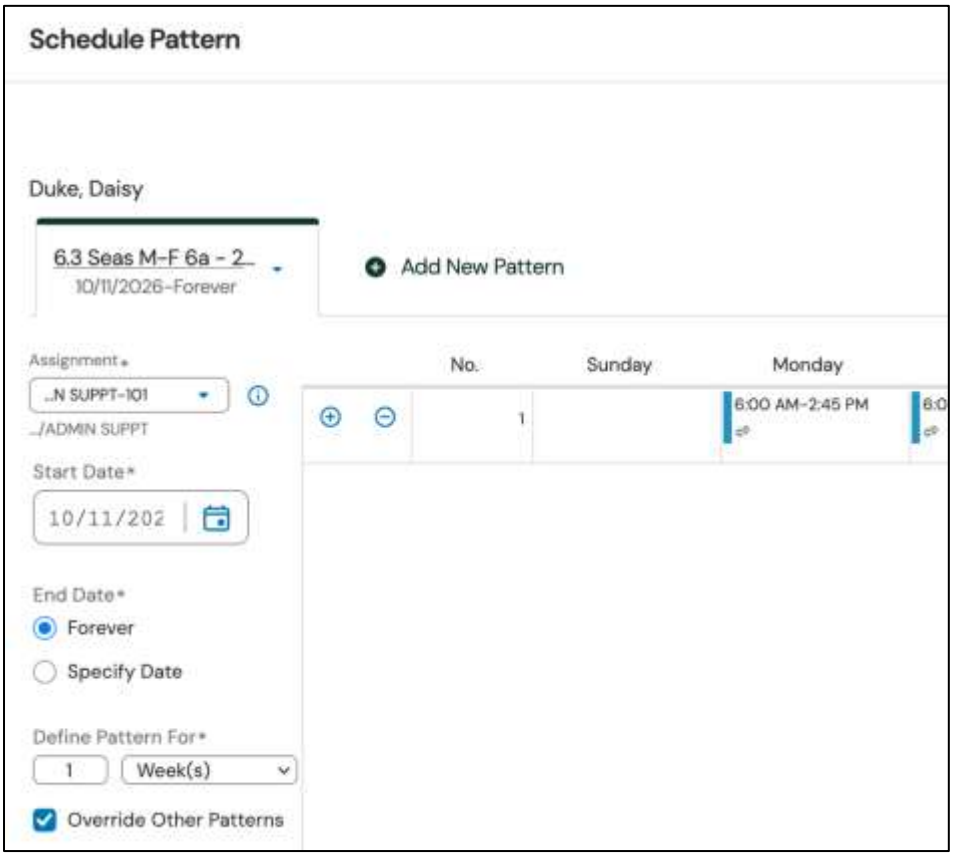
If the employee already has a Schedule Pattern built out, you can assign another Schedule Pattern in addition to what is already there. There are pre-defined Schedule Pattern templates in the system. Also, a Manager/Time Approver can create a Schedule Pattern and assign it to the employee (see instructions below).

To assign a **Pattern Template**, click the down arrow next to the **Pattern Template** icon. Next, select the Pattern Template you want to apply to this employee. The screenshot below displays a list of pre-defined Pattern Templates.



Once you select a **Pattern Template**, review your selections in the left menu for the **Start Date** and **End Date**, how long you are defining the Pattern for, whether you are overriding other Patterns, and which week to start the Pattern on.

When finished, click **Apply** in the bottom right corner.



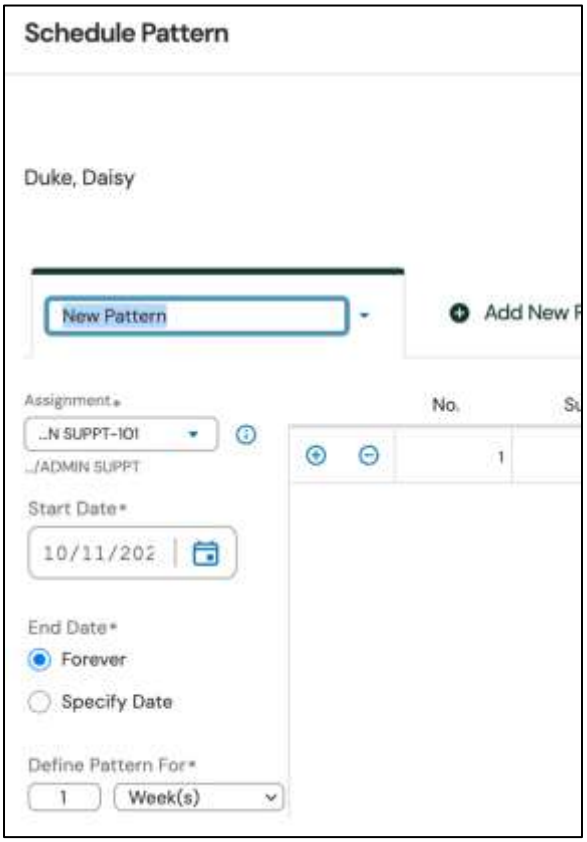
You will return to the Schedule grid where you must **Save** your work to apply the schedule.

As an alternative to using an existing template, you can create a **New Pattern** by filling in the information in the **Schedule Pattern / New Pattern panel**.

Tip

Be sure to name your New Pattern in a meaningful way so you can find it again.

Name your **New Pattern** and define your **Start Date** and **End Date**.



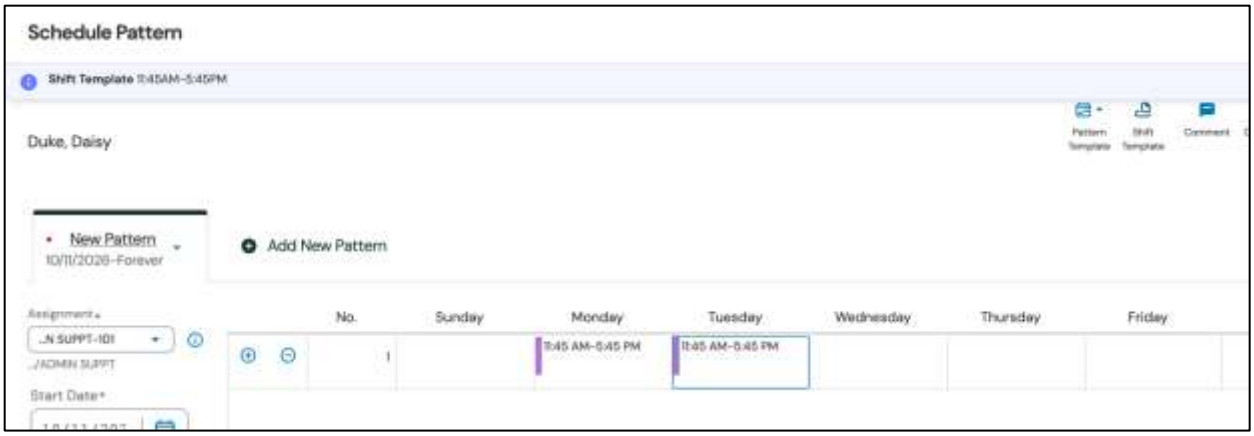
Tip

Please do not use the Forever button when you are creating a New Pattern; the system defaults to the year 3000. Specify a true End Date.

If you want to use a pre-defined **Shift Template** within your **Schedule Pattern**, click on the **Shift Template** icon and select your choice from the pre-defined **Shift Template** menu.



The **Shift Template** you selected will become active, as shown under the **Schedule Pattern** title. Your **cursor** will become a **plus sign (+).** Click into the cells for the days you want to assign that **Shift Template** to in the Schedule Pattern.

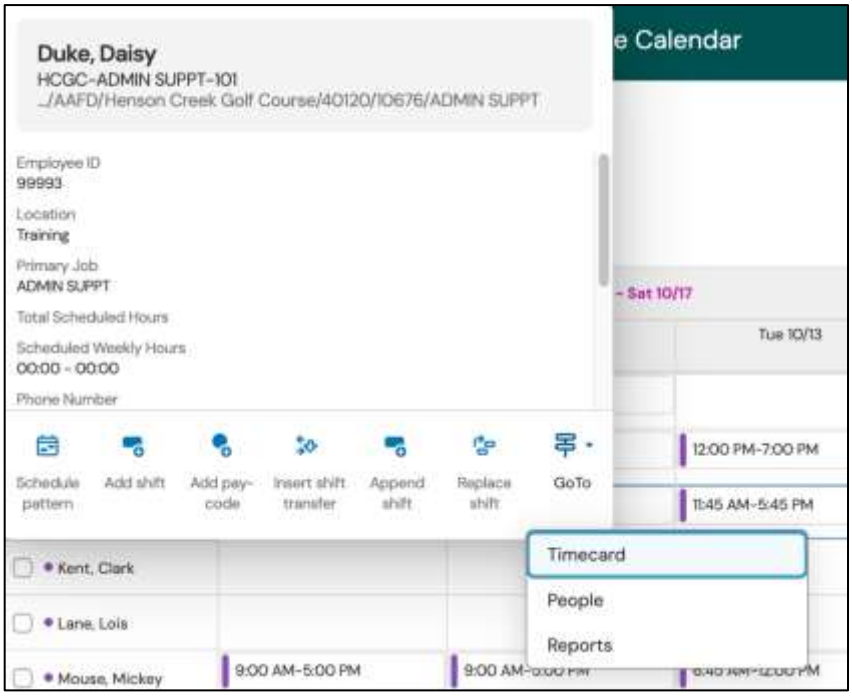


When finished, click **Apply** in the bottom right corner. When you return to the **Basic Schedule Planner**, click the **Save** button to apply your changes.

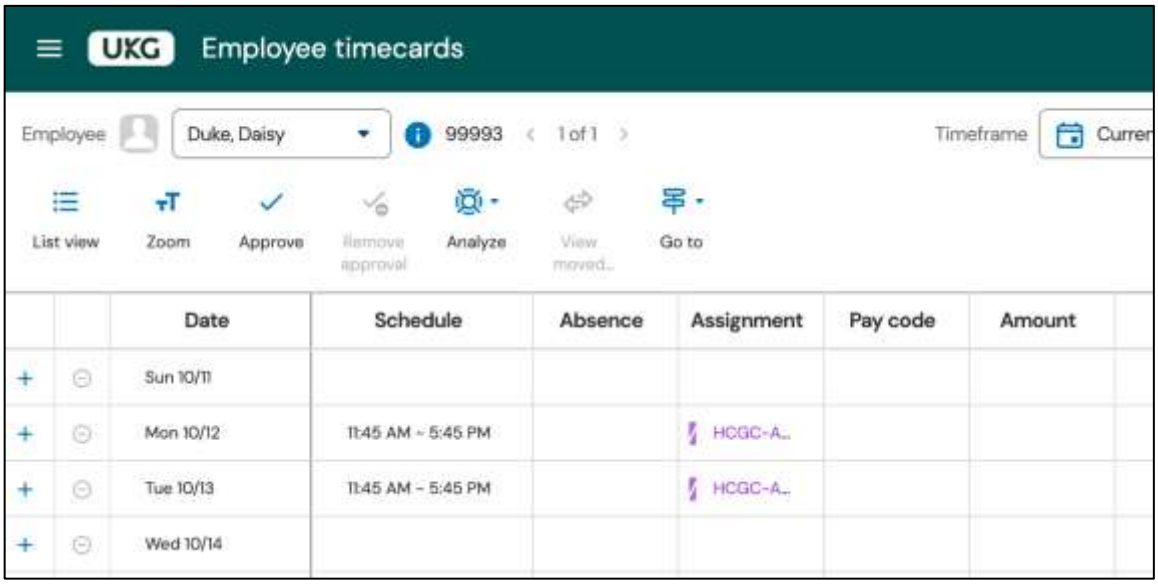
Tip

If you first apply a Pattern Template and then modify it, you will get a warning message that recommends you change the name of the pattern. Please DO rename the Template with something meaningful if you modified it; otherwise, you may be changing a Template that other people use.

Once you have applied and saved the schedule or shift, you can navigate to the Employee Timecard to view schedule information. **Right click** on the employee's name. Click on the drop-down next to **Go To**. Then, click on **Timecard**.



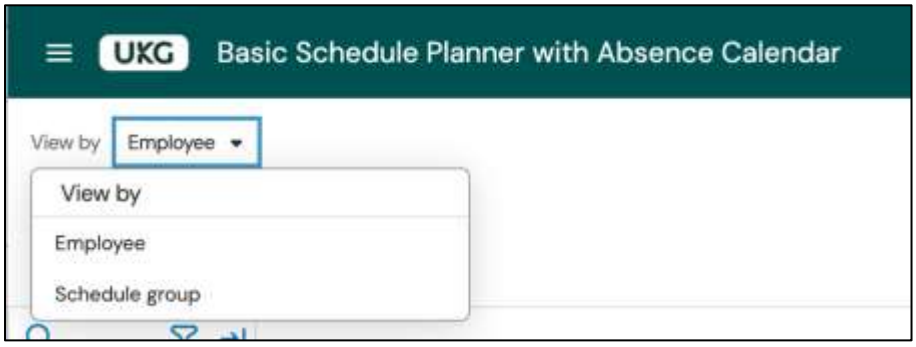
The **Employee Timecard** loads and includes the schedule for your review.



Scheduling Option 2: Use a Schedule Group from the Schedule grid

Purpose: To assign schedules in mass when you want to use existing Schedule Groups.

Within the **Basic Schedule Planner**, click on the down arrow next to **View by Employee** and select **Schedule Group**.

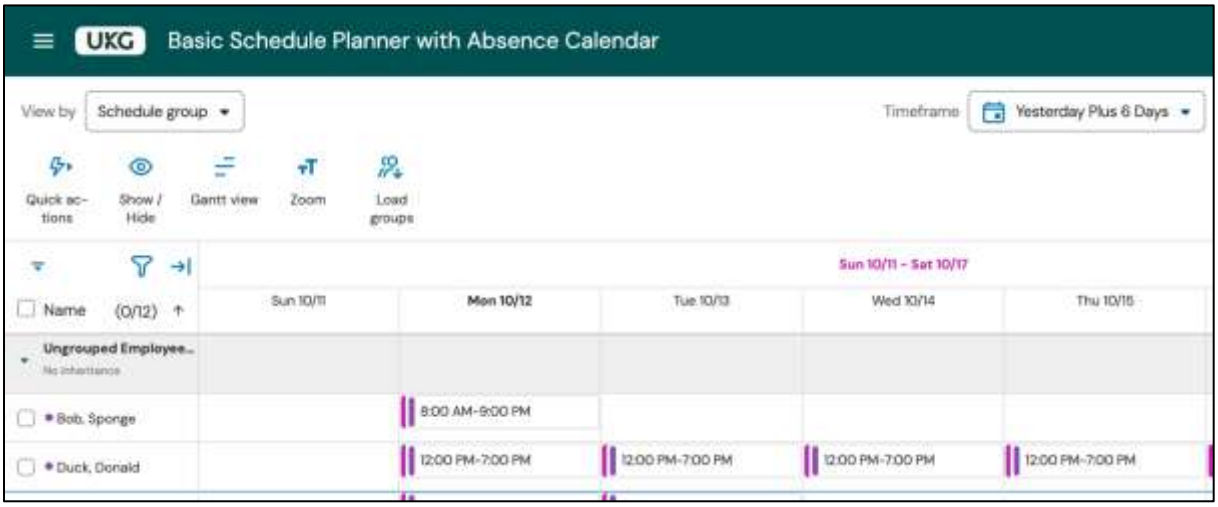


Tip

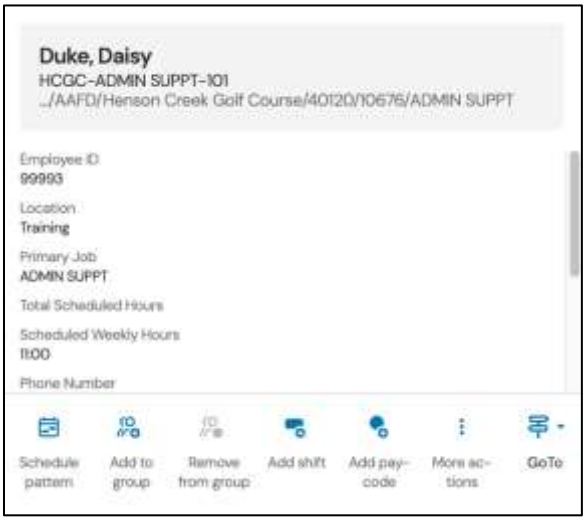
Employees can be in more than one group, you can only add to one group at a time.

In the left column, you will see both Ungrouped Employees and Grouped Employees, if applicable.

If you want to add one employee to a Schedule Group, **right click** on that employee's name. (*If you are only assigning one employee, you do not have to click the select box by their name; you can simply right click on their name.*)



Select **Add to Group** from the pop-up.



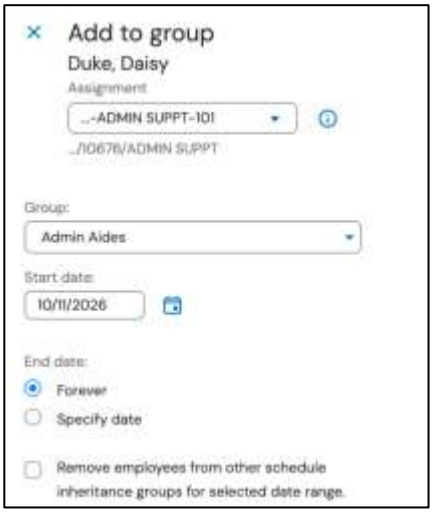
If you want to add multiple employees to a Schedule Group, click the **check box next to each name to add**, and then **right click** any one of their names. Select the **Add to Group** icon.



You will see a pop-up called **Add to Group** on the right. Click on the **down arrow** next to **Group**. From the **Group drop-down** menu, select the **Group**.



Then, specify a **Start Date** and an **End Date**. Start at the beginning of a pay period or work period.



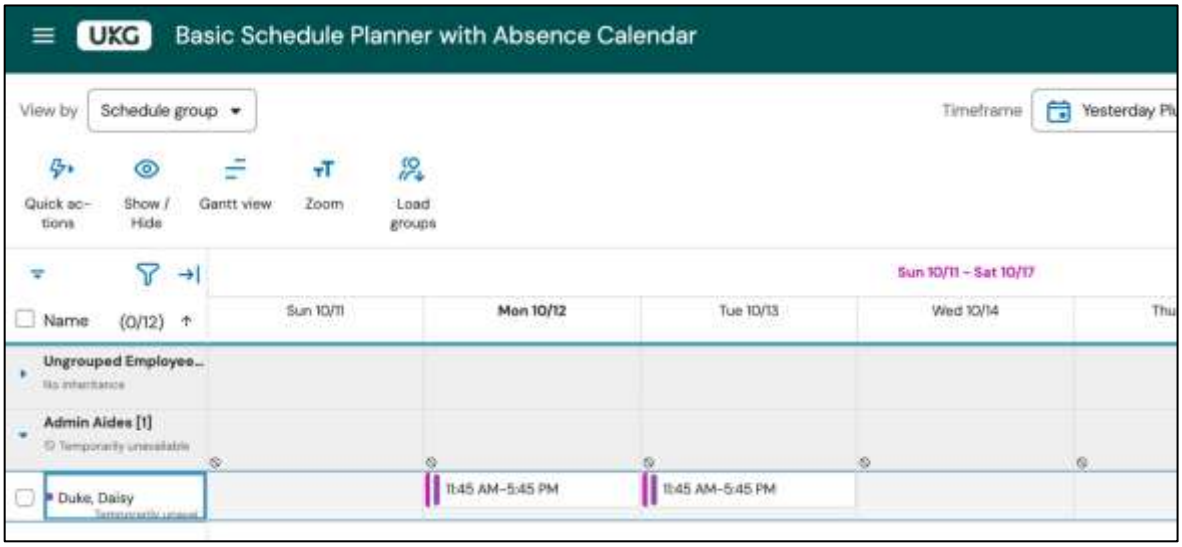
Tip

Please do not use the Forever button when you are scheduling; the system defaults to the year 3000. Specify a true End Date.

You might consider selecting the checkbox next to **Remove employees from other schedule inheritance groups for selected date range**. Only use this option if you are certain that other managers are not also assigning this employee to Groups.

When finished, click the **Apply** button in the lower right corner.

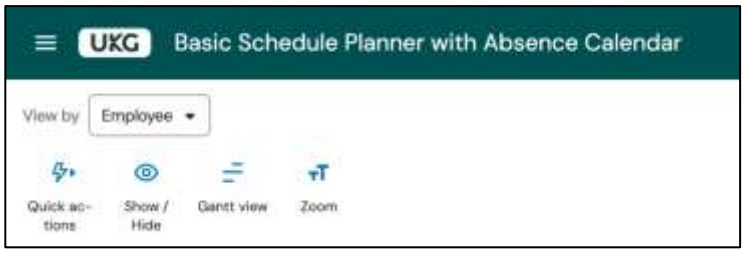
You will see the **Schedule grid** again. Now, on the left, you will see the new Group schedule you created (*in the screenshot below, it is Admin Aides).* You will also see that the employee you assigned to that Group is under that Group heading, rather than the Ungrouped Employees heading.



Scheduling Option 3: Use Quick Actions from the Schedule grid.

Purpose: To assign schedules for one-time use.

You have the option to use **Quick Actions** in the **Basic Schedule Planner** for multiple actions, including scheduling. Remember, **Quick Actions** are for one-time use. Once you navigate to the **Basic Schedule Planner** page, you will see **Quick Actions** on the top left.



Click on **Quick Actions** for a complete menu of options.



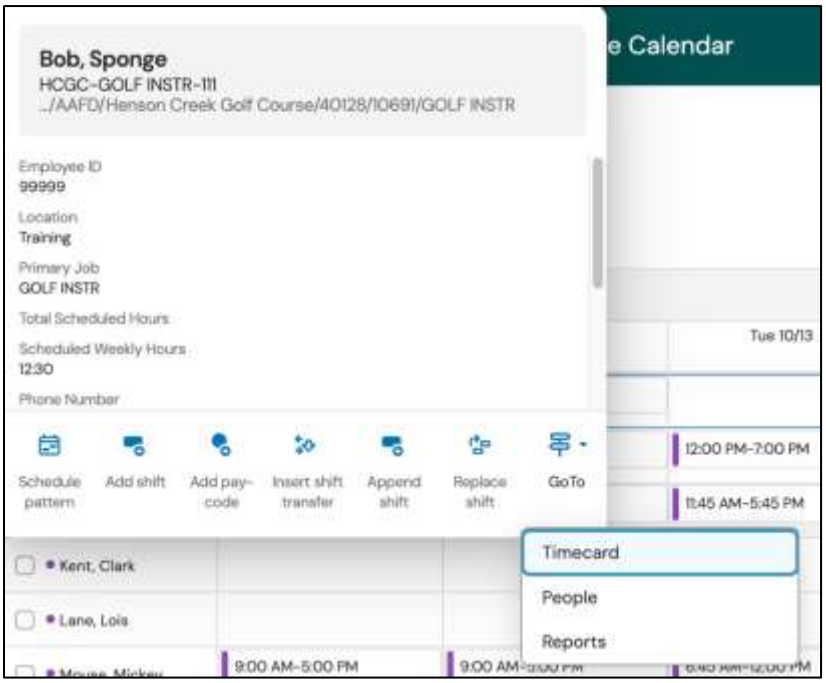
Scheduling Option 4: Use a Group assignment from the employee's People record.

Purpose: To assign schedules for one employee at a time, using Groups.

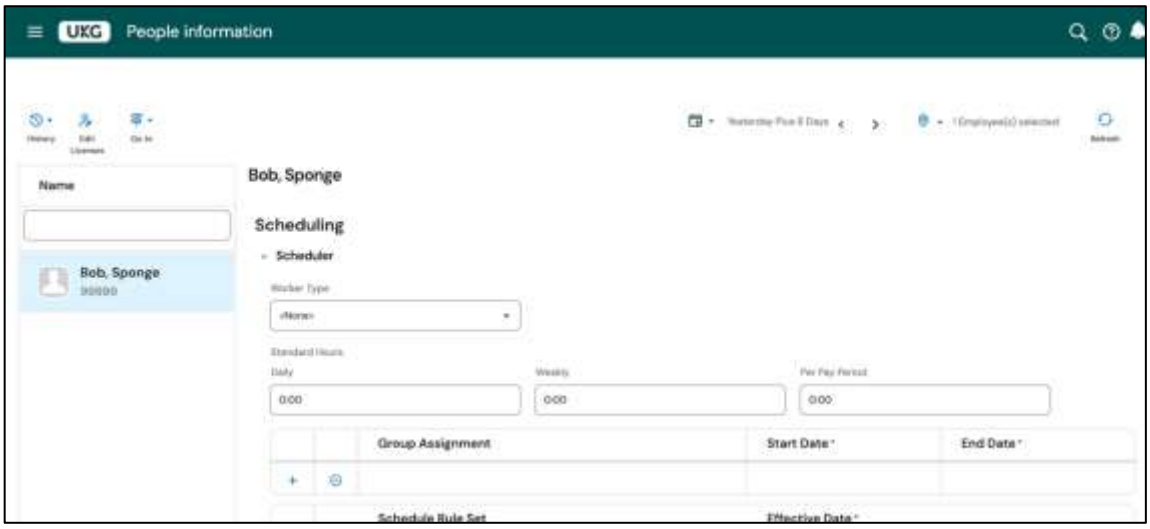
Tip

Schedule Groups are set by the UKG Support Team and cannot be modified by a user. You can request a new Schedule Group(s) option by entering a ticket in ONPOINT. See "How can I get help?" in this document to learn how to submit a ticket.

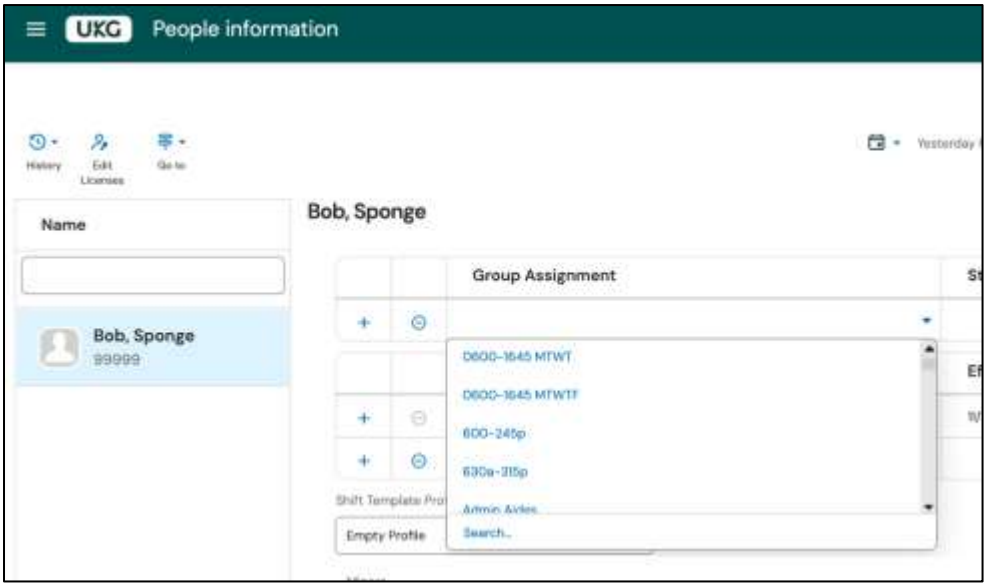
You can also assign an employee to a **Schedule Group** from their **People** record. From either their **Timecard** or their **Schedule grid**, click the down arrow next to **Go To**, then select **People**.



In the **People Information** screen that opens, look for **Scheduling**. Click the **arrow** next to **Scheduler** to expand the options.



You can then assign that employee to a schedule group with a **Start Date** and **End Date** using **Group Assignment**. Click the right arrow in the first row under **Group Assignment**. Make your selection.



Set the **Start Date** and **End Date**. Then click the **Save** button to save your work.

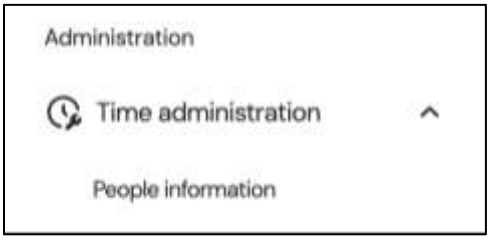
Tip

Please do not use the Forever button when you are scheduling; the system defaults to the year 3000. Specify a true End Date.

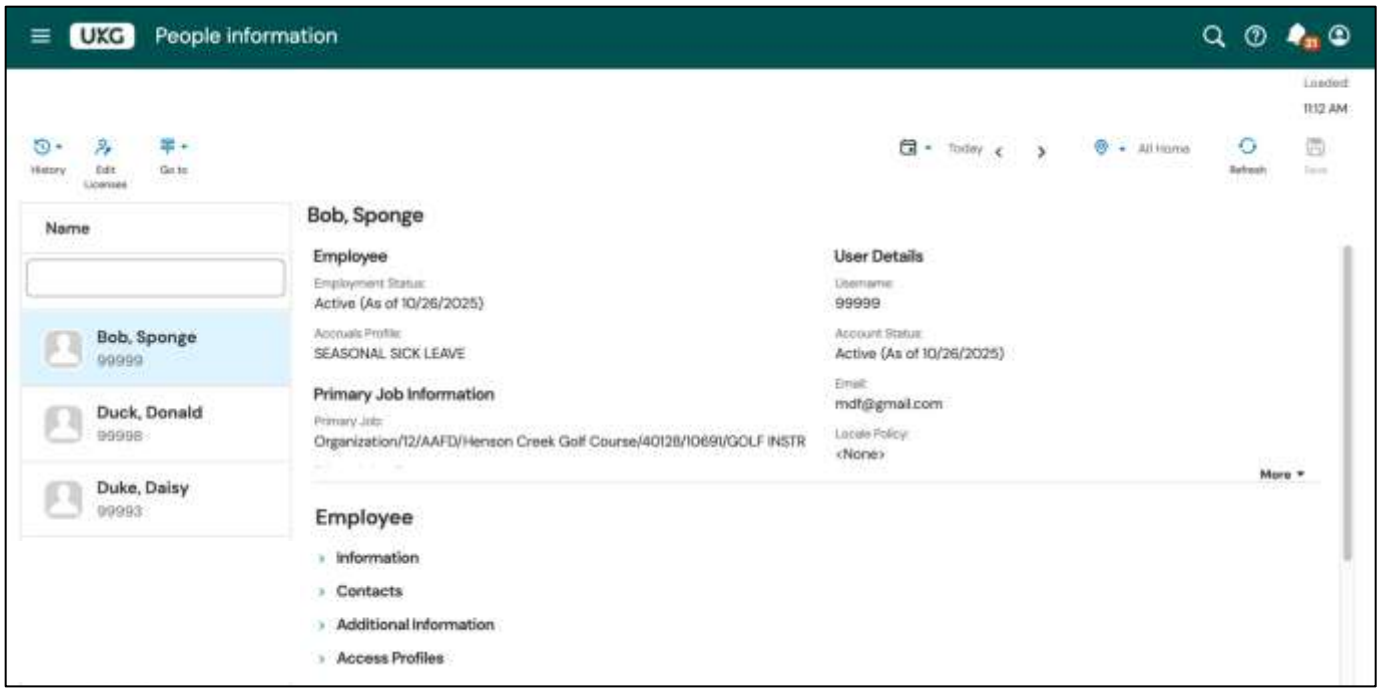
Section 4. Adding Employee Contact Information

How do I add or update employee contact information?

On the **Home** page, select the **Main menu** in the upper left corner. From the **Main Menu**, select **People Information** under **Administration, Time Administration**.



On the **People Information** page, select the Employee's Name from the list.



Next, select **Contacts** under the **Employee** heading.

When the **Contacts** option is expanded, you may enter the employee's contact information. Select the **Save** button in the upper-right corner when finished.



When entering a Phone Number, use the following format: +1 with the area code and phone number with no spaces or dashes, e.g., +12025559743. In order to send SMS text messages to employees, add phone number to field Phone 1 and check SMS. Adding the email address for Seasonal / Intermittent employees enables workflow notification and self-service password reset.

Tip

Fields "Phone 2" and "Phone 3" can be used to store phone numbers, but they are not used to support SMS at this time. For employees who are issued a Commission email address, the information will be populated through automation.

Section 5. Delegating Your UKG Workforce Pro Responsibilities to Another Manager

How do I submit a request to delegate my responsibilities to another manager to perform?

Delegation requests are used most often when managers are out of the office, going out on short-term or mid-term leave, or if a manager anticipates a vacancy that will be filled soon. You must have approval to delegate your responsibilities.

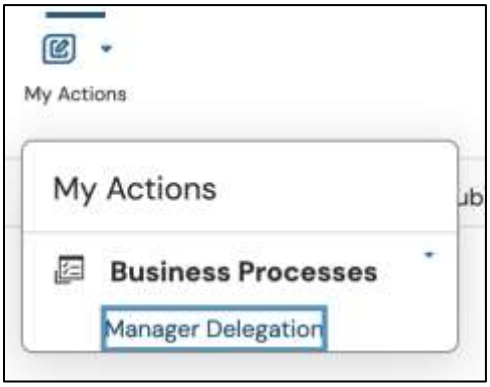
Tip

The approval will take place outside the system. A manager must get approval from their supervisor to delegate their responsibilities to another manager.

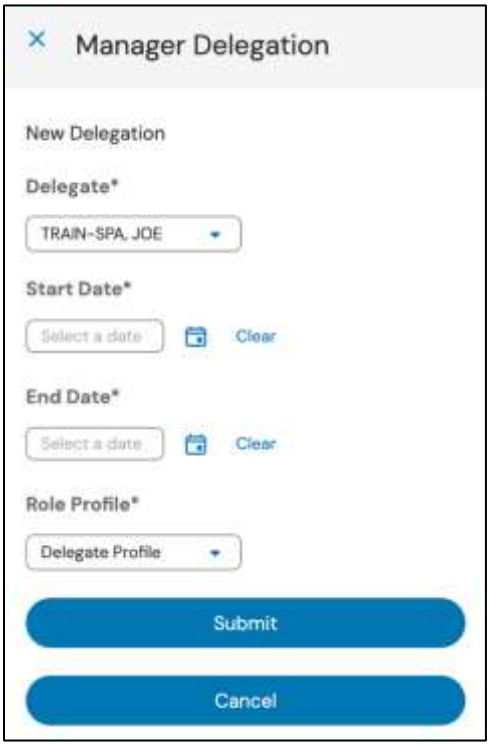
Click on the **My Notifications** tile on the **Home** page.



On the top left, click on the down arrow next to the **My Actions** button. Select **Business Processes**. Then, select **Manager Delegation**.



A pop-up will appear on the right for **Manager Delegation**.



First, click on the down arrow in the **Delegate** box to select the manager you want to delegate to.

Tip

You can only delegate to a manager who already has a manager's license in the system and who is in your department.

Next, use the Calendar icons to set the **Start Date** and **End Date**.



Do not do anything with the **Role Profile** down arrow. It will default to Delegate Profile. When finished, click **Submit**.

Tip

You can only delegate a Start Date from the current day going forward. You cannot delegate from the previous day or going into the past. You can set a future date, but the manager will not see it until the future date arrives.

There is no limitation in the system to the End Date (it can be a day, a month, a year, etc.). The delegation will automatically expire on the end date with no action on your part.

You will see **"Success Submit action has completed successfully"** in the **Manager Delegation** pop-up.

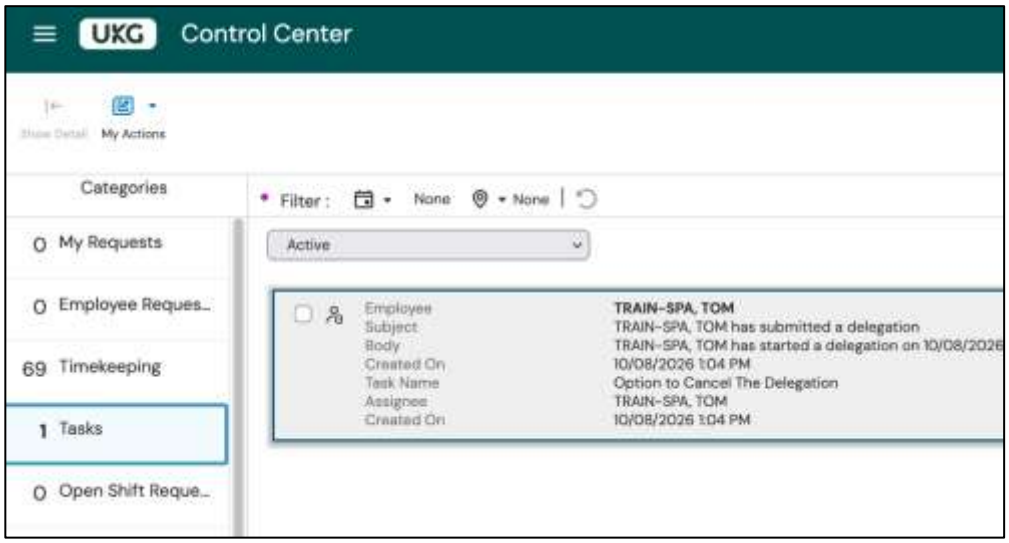


You can then click the **large blue X** next to Manager Delegation to close the pop-up.

Tip

When you submit, an email notification will be sent to the manager as a request. You will receive an email that your request has been submitted.

To view your pending delegation requests, click **Tasks** under the **Categories menu** in the **Control Center**.

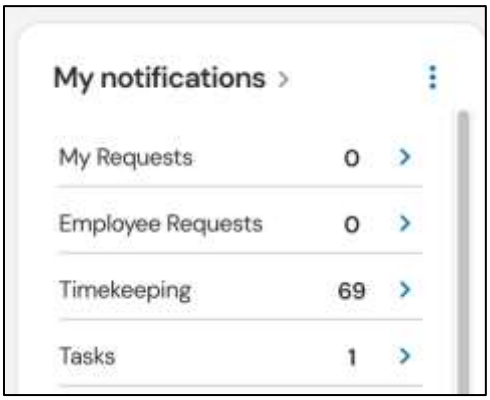


How do I cancel a delegation?

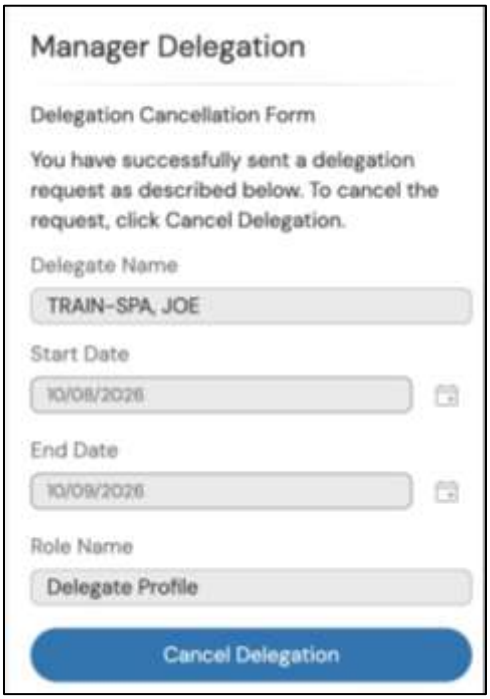
Tip

You may want to cancel a delegation if you made a mistake or want to end it early.

On the **My Notifications** tile on your **Home** page, choose the **Tasks** right arrow to get to the **Control Center**.



Click on the delegation request that you want to cancel. On the right, you will see the details of the request with a **Cancel Delegation** button at the bottom. Click it to cancel at any time.



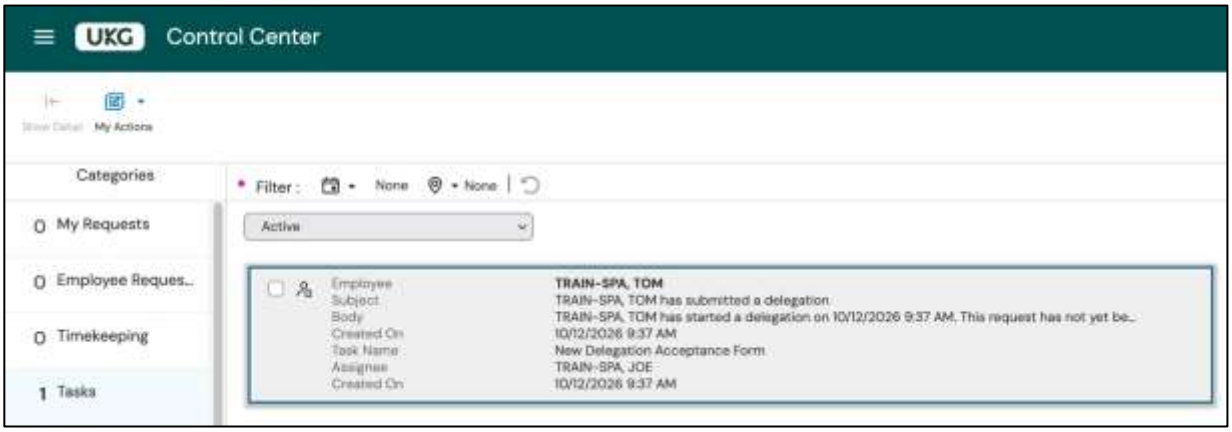
How do I accept or reject a delegation request from another manager?

Tip

Managers can only have 3 delegations at one time.

Click the hyperlink in the email you received requesting delegation. Log on successfully to the system.

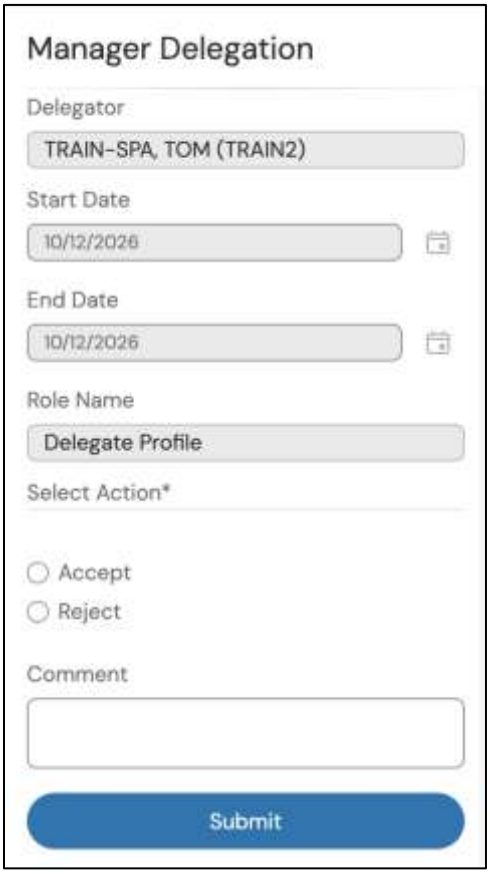
Click on the **My Notifications** tile on your **Home** page (or the **Alarm** icon in the far-right top corner). Find the specific **Task Assignment** for the new delegation request in the **Control Center**, and click on it. You will see the Task request in full; review the details.



Tip

You cannot change the **Start Date** or **End Date** on the request.

In the **Details** section on the right, you will **Accept** or **Reject**. A **Comment** on the request is optional.



If you **Reject** the request, please add a **Comment** as to the reason for the rejection. The request will be returned to the requesting manager, and they will need to submit a new delegation request.

If you **Accept** the request, you agree to perform the process duties on behalf of this manager.

When finished, click **Submit**.

Tip

When you click Submit, the Task will disappear. The requesting manager will receive email notification that you accepted their request.

How do I perform my delegated responsibilities?

Tip

To see your delegated responsibilities, you must log out and log back in.

After you log back in, go to the top right of your screen and select the **Switch role** option.



In the **Roles & Employments** pop-up box, you can switch between your **Initial Role** and your **Delegate Role** by using the drop-down arrow.



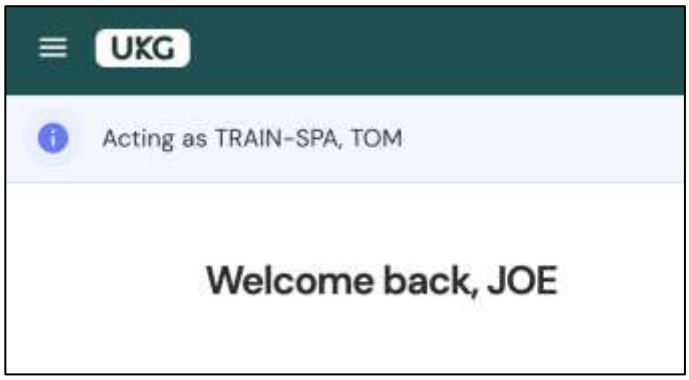
To perform the **Delegate Role**, select the button beside it, then click **Confirm**. Reverse this action to return to your **Initial Role**.



Tip

Initial Role is your original manager role. **Delegate Role** is the temporary assignment you have accepted while the original manager is out of the office.

When you are acting as a **Delegate** for another manager, your log in name will show that you are **Acting as** that manager.



Now you can perform your delegated responsibilities.

Tip

You will not be able to see the delegation in the system until the date the delegation starts. So, don't worry if you don't see the delegation switch in the system today when your Start Date is in the future.

Section 6. Viewing Reports for Managers/Time Approvers

How do I view reports that are available to me as a Manager/Time Approver?

Tip

Only Managers/Time Approvers have access to the reports.

Go to the **Main Menu** on the upper left. Under the **Administration** section, select **Reporting**.



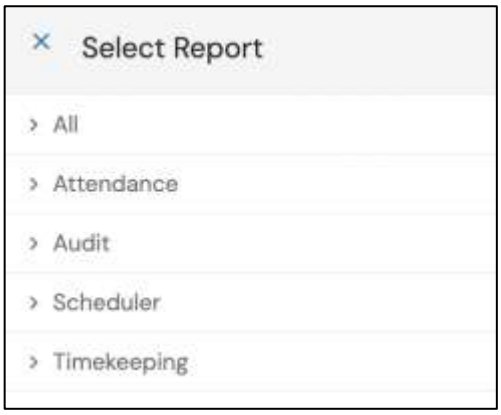
Select the **Reports Library** shortcut.



From the **Reports Library** screen, choose the **Run Report** icon.



You will see a **pop-up on the right** with an index of reports, either **All** or by category, such as **Attendance**, **Audit**, etc..

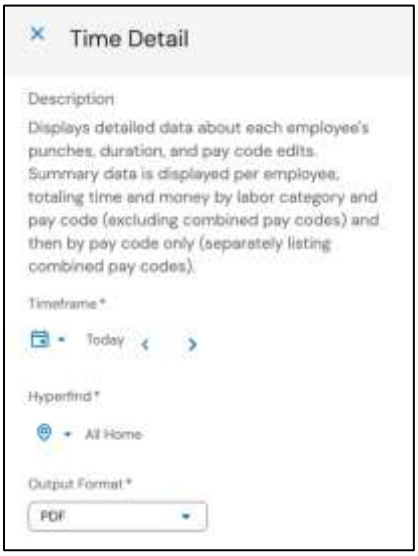


Click **All** to see all reports available.

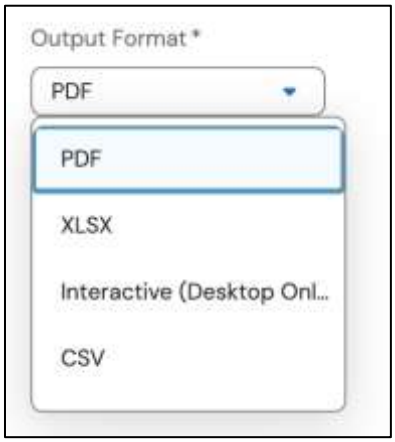


Choose the report you want to view and click **Select** at the bottom of the screen.

You will see the pop-up change to the title of the report, a description of it, and options for **Timeframe**, **Hyperfind**, and **Output Format**.



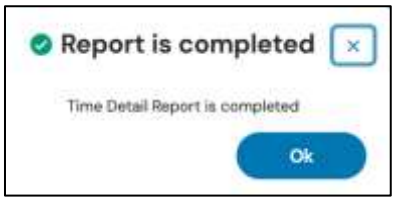
Some reports have options for the **Output Format**, such as PDF, XLSX, CVS, or other.



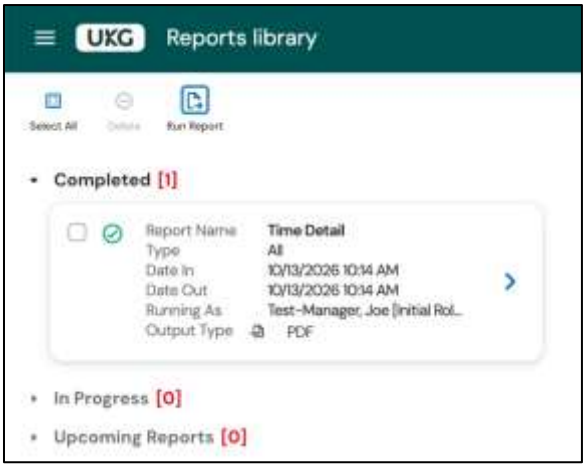
Make your selections and click **Run Report** at the bottom.



After the report is run, you will see a pop-up with **Report is completed**. Click **OK** (or the **X**) to close the pop-up box.



To find the report, go to the **Completed** section of the **Reports Library.**



If you click on the **Completed Report**, it will automatically launch on your screen. As an alternative, you may click the **checkbox** to select the report. This will launch a pop-up on the right side of the screen with **Report Details** and report options.

In the report **Detail** pop-up box you have details about the report and several options: **Delete, Re-Run, and View Report**.

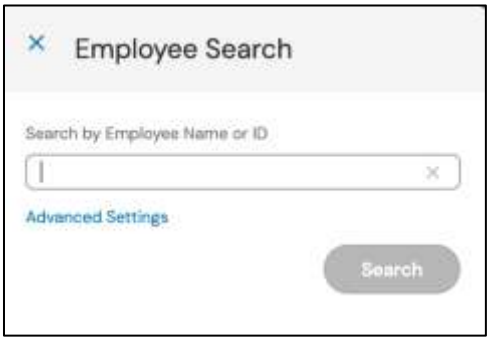


You also can find the report in your **Downloads**. (See the section titled, **When do I need to download a Dataview?** to learn how to download.)

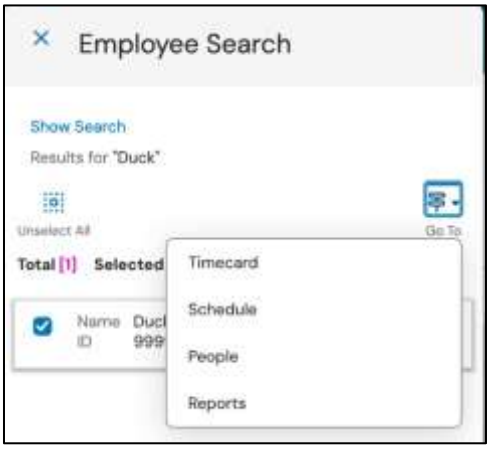
If you want to run a report for a particular employee, you can run the report from the **Employee Timecards** view by clicking on the **Search** icon in the upper right corner of the screen.



The **Employee Search** panel will appear on the right. Enter the **Employee Name**, then click the Search button.

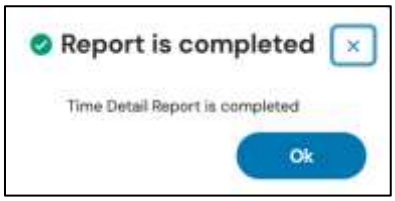


In the search results, select the **checkbox** beside the Employee's **Name**. Then select the **Go To** button and select **Reports**.

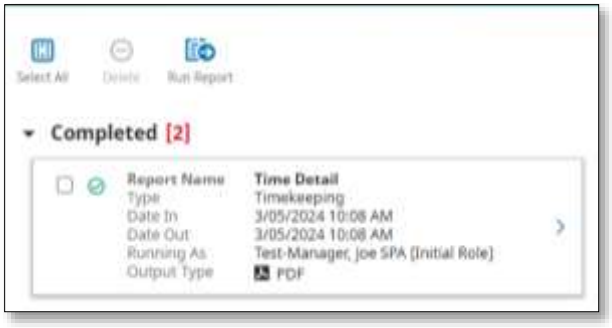


You will see a pop-up on the right with an index of reports, either All or by category. If you navigated here through the **Employee Timecard**, the Hyperfind will show you that you've already selected an employee. Select the desired report.

After the report is run, you will see a pop-up with **Report is completed**. Click **OK** (or the **X**) to close the pop-up box.



If you click on the **Completed Report**, it will automatically launch on your screen. As an alternative, you may click the **checkbox** to select the report. This will launch a pop-up on the right side of the screen with **Report Details** and report options.



You also can find the report in your **Downloads.**

How do I use the Dataview Library?

Tip

A Dataview is a dashboard report.

From the **Home** page, click the **Main Menu** in the upper left corner.

Under **Administration**, select **Reporting**.



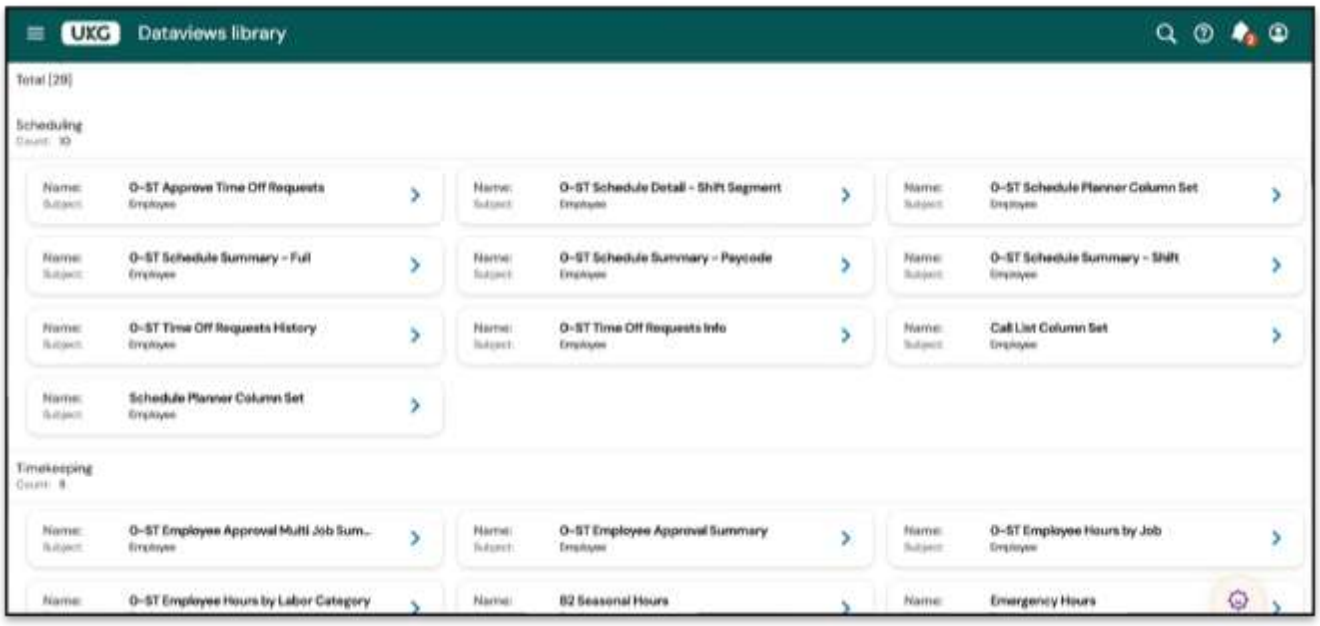
From the **Reporting** screen, select the **Dataviews library** shortcut.



You will see a grid of the **Dataviews** that are available to you.

Tip

Dataviews are organized and grouped by category, such as Timekeeping or Scheduling.



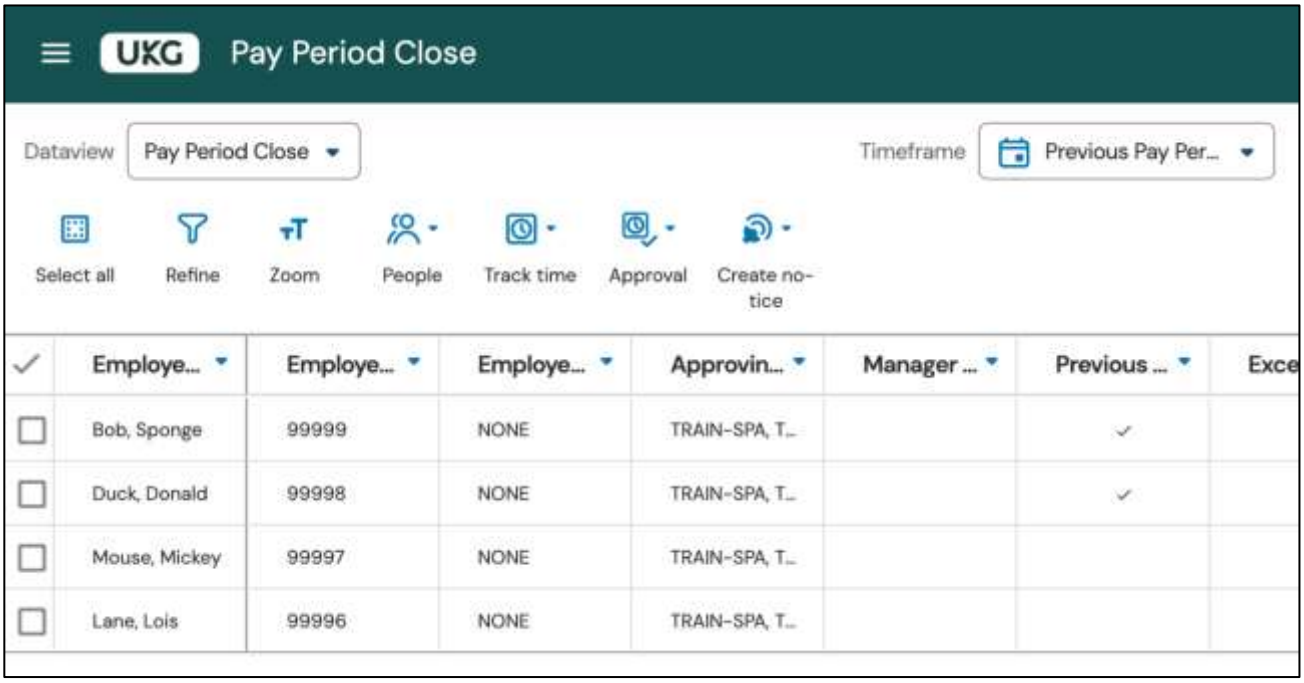
Find and select the desired **Dataview**, such as **Pay Period Close**.



Tip

If the number of records exceeds the threshold limit for display, you will be automatically prompted to download the Dataview.

An open **Dataview** looks like the one below, called **Pay Period Close**.



When do I need to download a Dataview? And how?

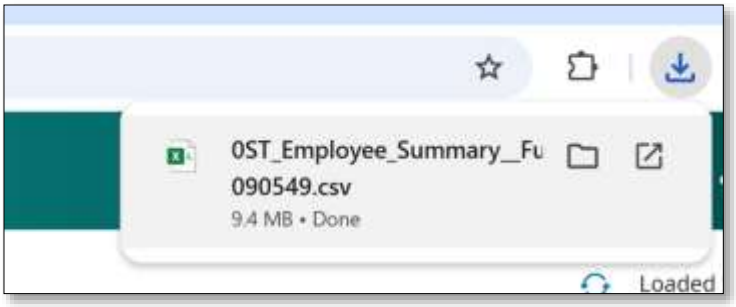
If the **Dataview** has too many records to display, you will receive a message asking whether you want to create a download of your selection. The **Download** button will be located in the bottom right corner of your screen.



Click the **Download** button to create a download file of the data. You are automatically directed to the **Reports Library** where you can access the file.



Select the download file of your choice. It is downloaded in comma-separated value (.csv) format, and you can open it with the application of your choice. It is stored locally in your **Downloads** folder.



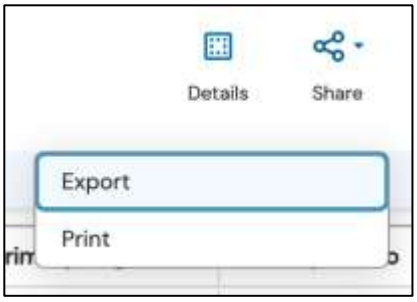
If you navigate away from the **Downloads** page and want to return to it, from the **Dataview Library**, click **Navigate to Downloads** in the upper left.



Can I print a Dataview?

Yes, you can; however, it depends on the **Dataview**.

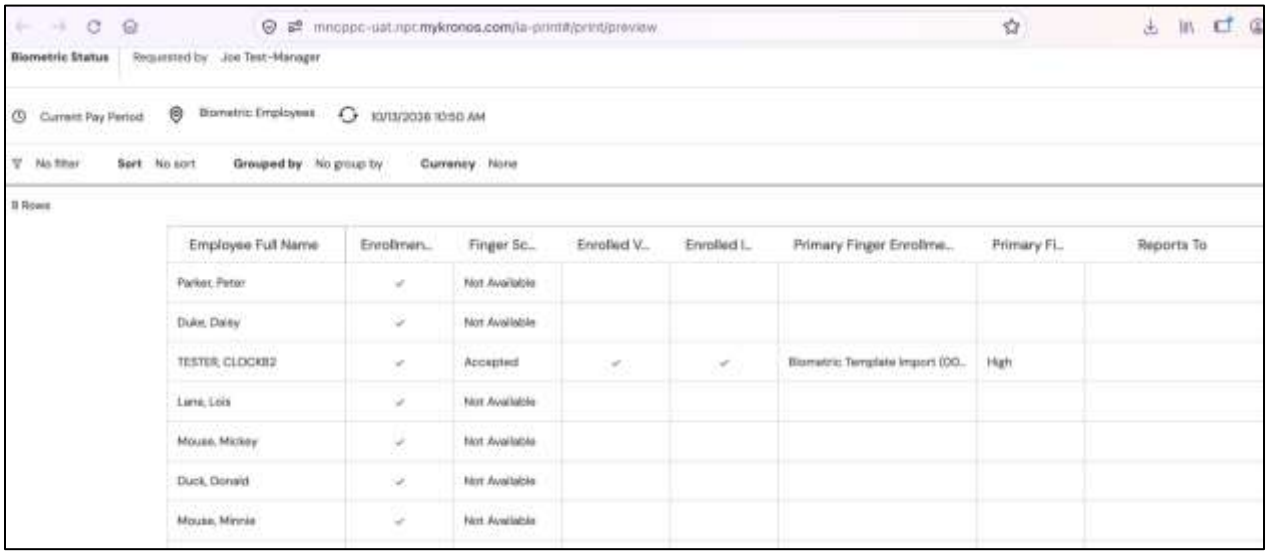
If you see the **Share** button on the right side of the toolbar, then you can **Print** the Dataview. From the **Dataview** toolbar, click **Share** then click **Print**.



In the **Print** panel, the items that are available to print are displayed. Select the items that you want to print, and click **Continue**.



A preview of the items you want to print appears in your browser. To **Print**, use your browser's print capability.



How do I export a Dataview?

If you see the **Share** button on the right side of the toolbar, then you can **Export** the Dataview. From the **Dataview** toolbar, click **Share** then click **Export**.



The **Dataview** export will quickly appear in the upper right corner of your screen. If you miss it, you can click on the **down arrow in the upper right corner of your screen** to retrieve it.



You also can find the **Dataview** export in your **Downloads**.

Tip

After you click Save, you may be prompted to save the file to a location on your computer. Locate the file on your computer; then open. These steps may vary depending on the browser that you are using. You will need to download a Dataview when the number of records exceed the display threshold. Don't forget to sign out of UKG!

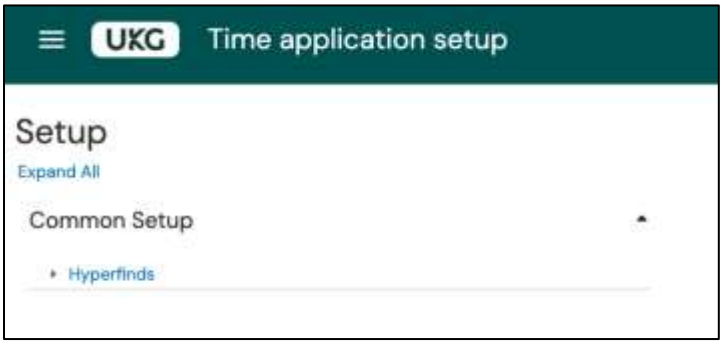
Section 7. Creating Your Own Hyperfind Query

How do I create and save a personal Hyperfind?

From the **Main Menu,** click on **Time application setup** under **System Configuration**.



In the **Time application setup** screen, click on the **Hyperfinds** link under **Common Setup**.



From the **Hyperfinds** page, select the **Create** icon on the toolbar.



Tip

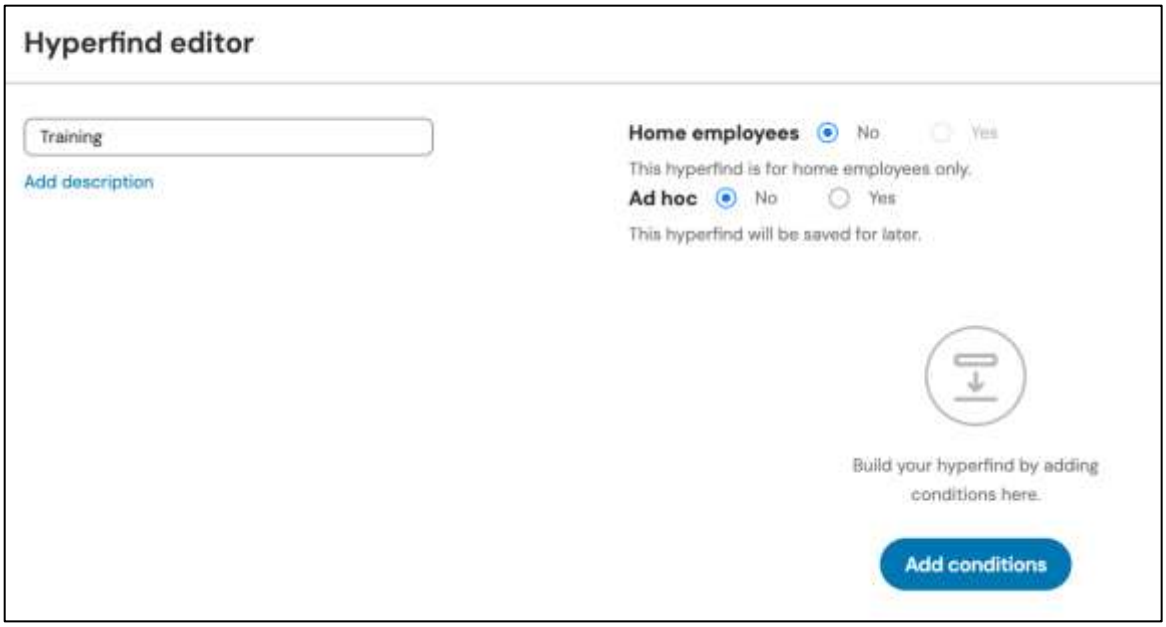
Only you will be able to see this **Hyperfind**. It will be labeled as Personal visibility in the system. You, as an end-user, are restricted from creating public **Hyperfinds**.

On the **Hyperfind Editor** page, you will see options that you cannot edit and options that you will need to define. If you cannot edit it, the options will be greyed out.



First, decide if you want to create an **Ad Hoc Hyperfind** or if you want to save it for future use. It will default to **Yes** for **Ad Hoc**, which is a one-time use. Any **Hyperfind** created that is specified as **Ad Hoc** is not saved in the system.

If you want to save it for future use, click **No** for **Ad Hoc** and then enter a **Name** for your query in the **Add Description textbox** on the left.



Then, click the **Add Conditions** button in the middle of the screen.

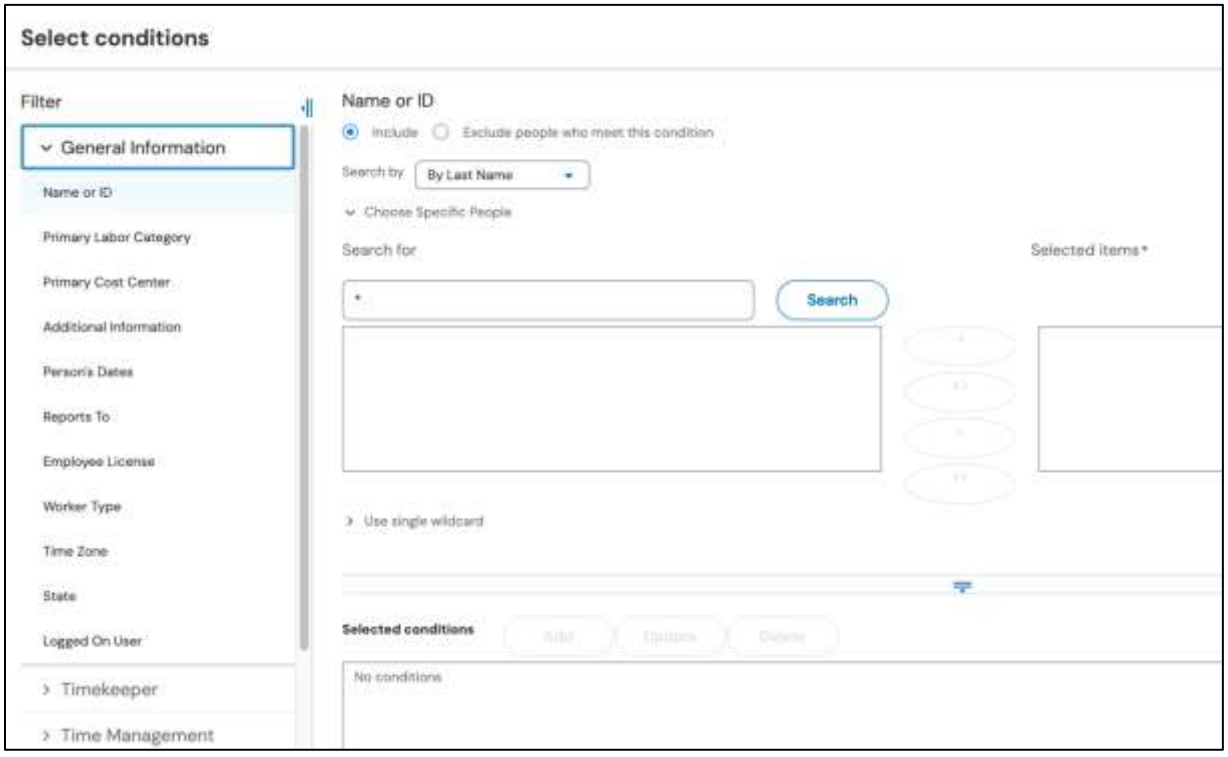
Tip

Conditions are how you apply the filters you want to include in your Hyperfind.

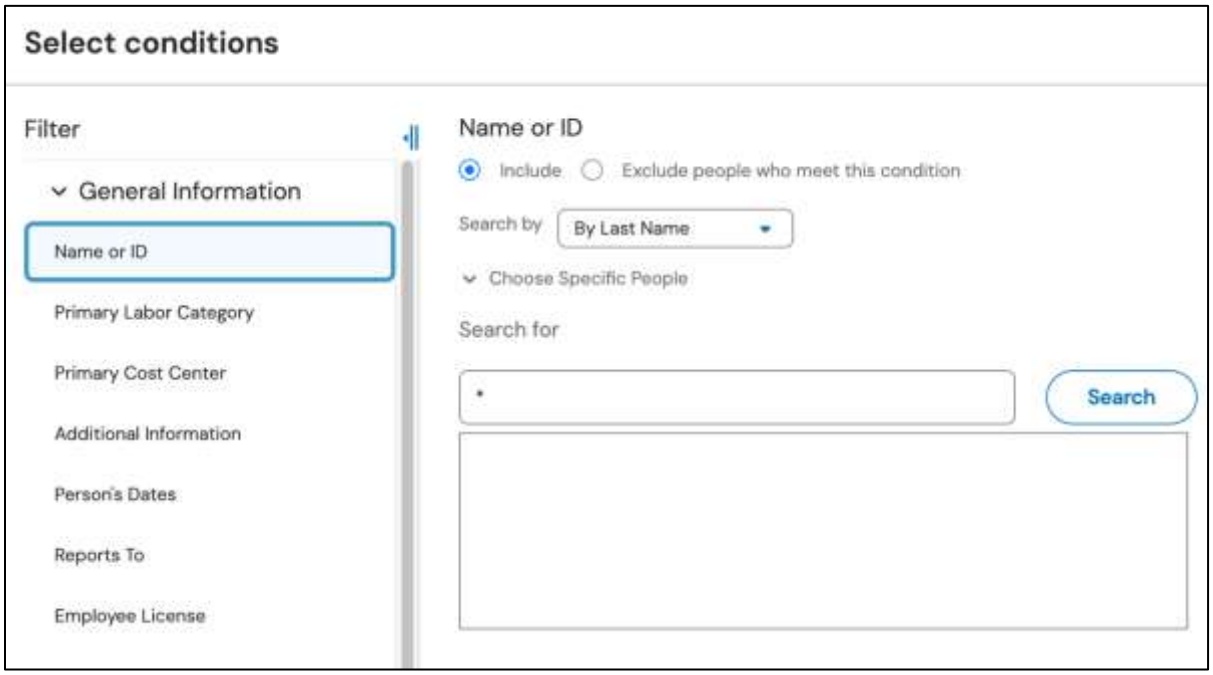
When you click **Add Conditions**, you will now see a set of **Filters** on the left with drop-down menus under them that you can expand for many options. You will also see the first available **Filter** under **General Information** called **Name or ID**.

Tip

In the Select Conditions dialog box, there are main filter categories: General Information, Timekeeper, Time Management, Scheduling, Accruals, User Information, and Business Processes. (Note: Business Processes is the category you can use to filter for Delegations.)



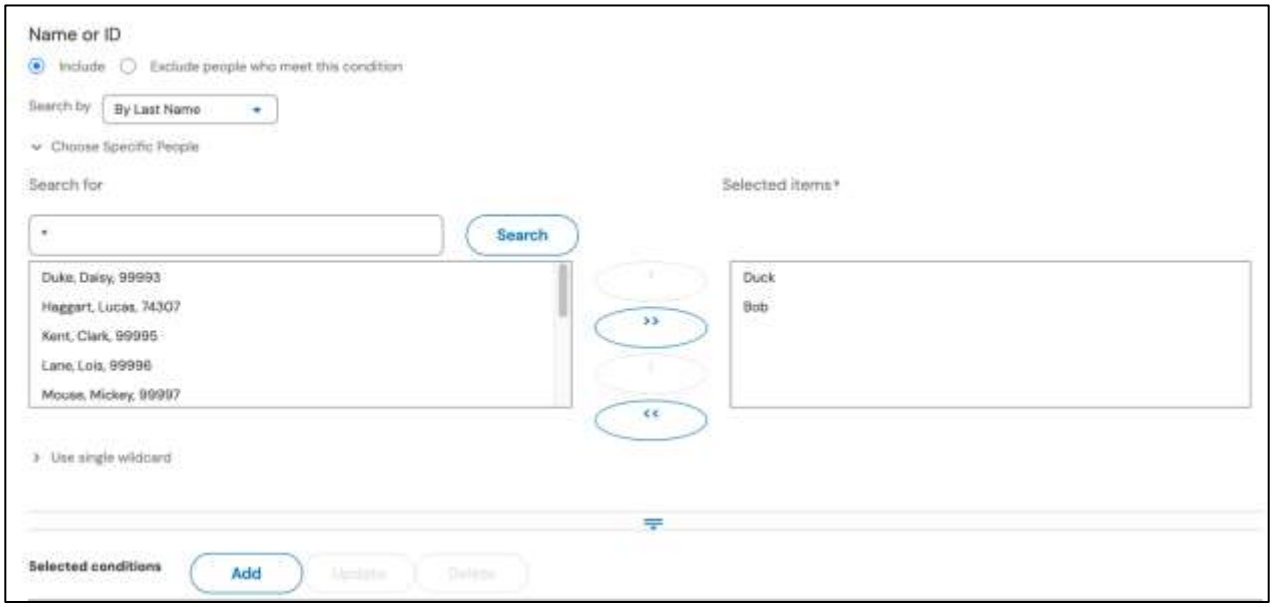
When you have selected the **Filter** you want, you can add information to your **Filter**. In the screenshot below, you are including people who match the criteria to **Search by Last Name** for all employees that you have access to. You will get all employees because you have the **wildcard (*, asterisks)** in the text box called **Search for**.



Click the **Search** button to see the results of your Filter condition, but you have not yet added them to your Hyperfind.

In this screen, you will see your results on the left with a set of **arrows** in the center that direct you to add the items you want from the left box to the right box. The right box is called **Selected Items**. If you select one result, use the single arow. If you want to select all results, use the double arrows.

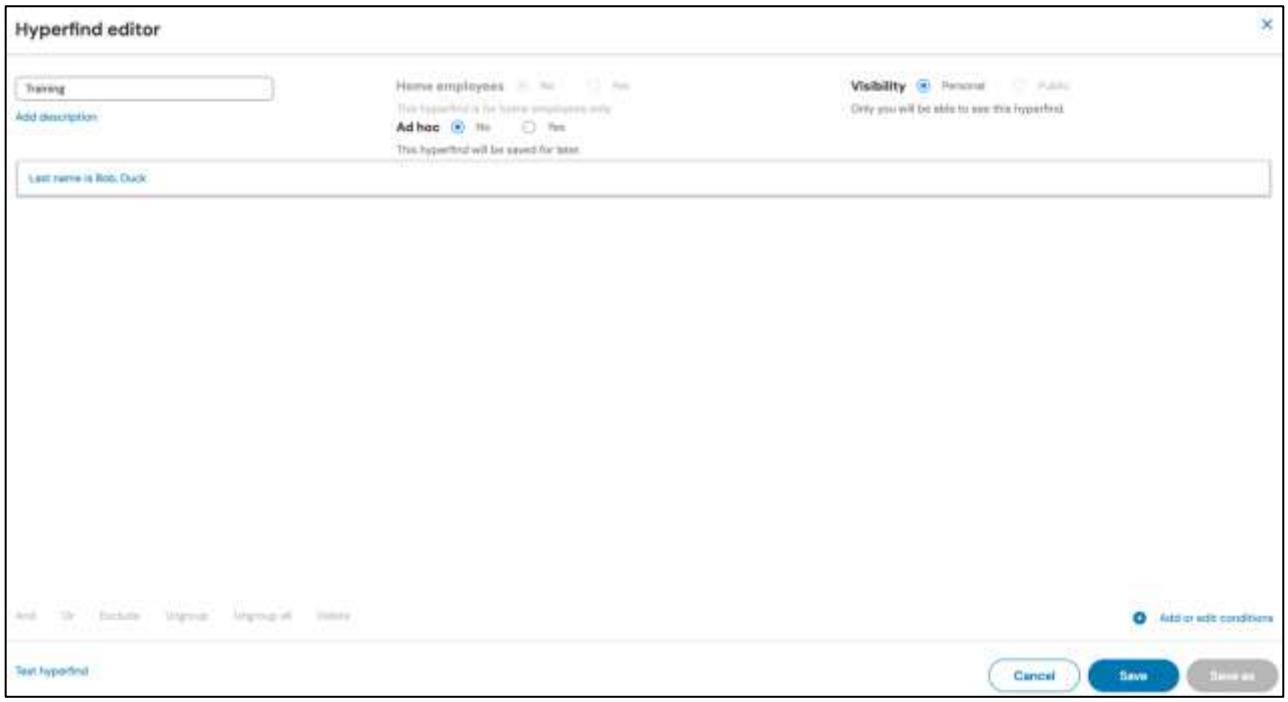
In the screenshot below, you see that two results were moved to the **Selected Items** box on the right. Only then will the **Selected Conditions, Add** button become active. Click **Add**.



Your Selected Items will now appear in the **Selected Conditions** box at the bottom of the screen. Next click the **Apply** button.



After you click **Apply**, you will see the **Hyperfind Editor** screen that shows you a summary of your **Hyperfind**.

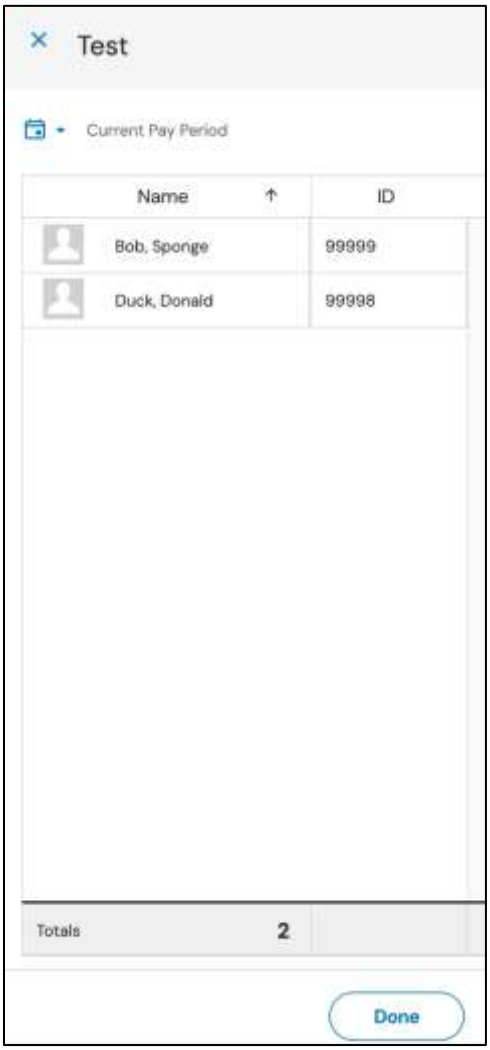


To test the query, click **Test Hyperfind** in the lower left corner.



You will see the **Test** pop-up on the right that shows you the results of your **Hyperfind** for the **Current Pay Period** with a **Total** count of results at the bottom.

You can select different **Timeframes** you are interested in by selecting the **Calendar** icon. Review your Hyperfind results; then, click **Done** to close the test.



Tip

"Week to Date" is recommended for anything you want to see that is true today.

If you like your results, you can **Save** the **Hyperfind** by selecting the **Save** button in the lower right corner.

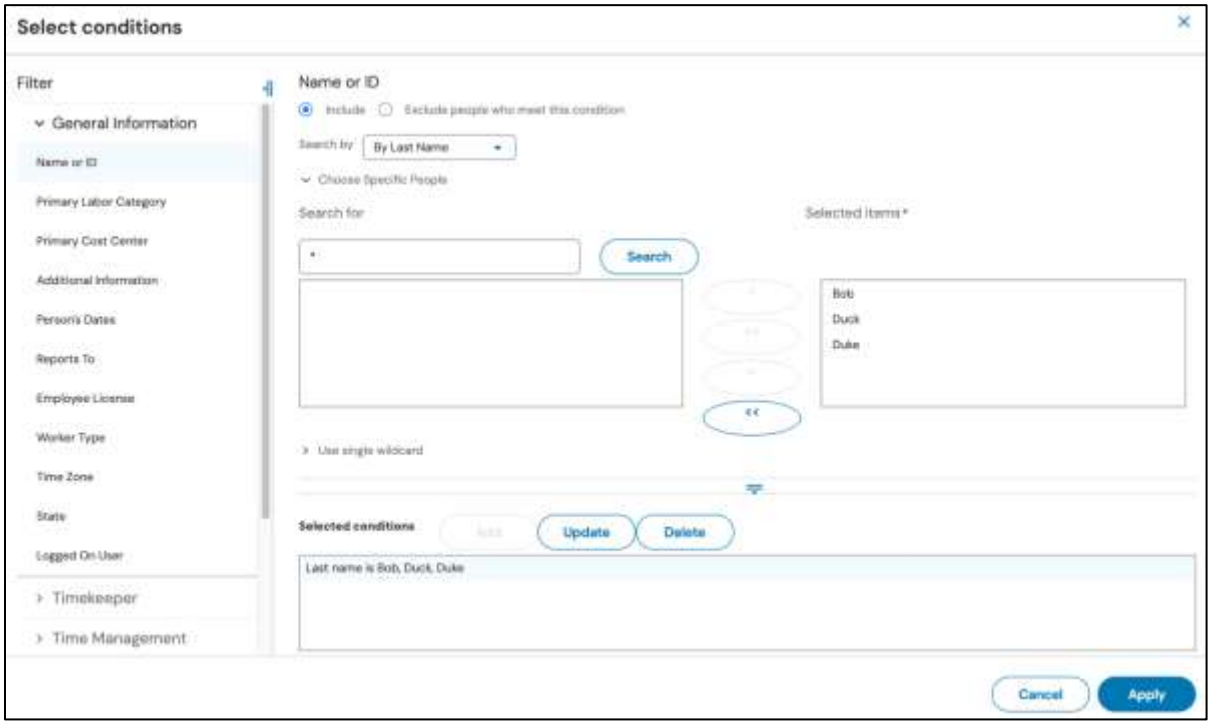


If you do not like your results, make the appropriate edits to your filters and filter conditions by clicking the **Add or Edit Conditions** option to relaunch the **Select Conditions** pop-up.

Click on the conditions that you want to update that are within the **Selected Conditions** box. Next, use filters to filter conditions to add new items. To complete, return to earlier instructions.

To modify items, select the items that you want to modify, then click blue arrow button. Then, click the **Update** button.

To delete all conditions, select the conditions then click **Delete**.



Next, click the **Apply** button at the bottom right corner of the screen.

Click **Test Hyperfind** in the lower left corner to retest your **Hyperfind**.



If you like your results, click the **Save** button at the bottom of the screen.

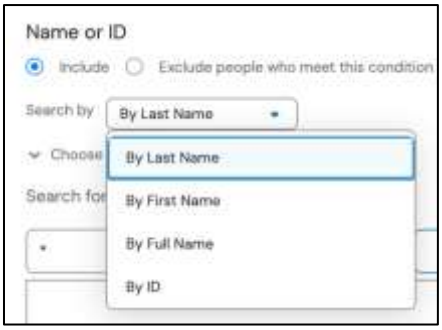
Once you click **Save**, you will return to your list of **Hyperfinds**. You will see the one you just saved in the list; the table will show that it is only visible to you **(Personal)** under the **Visibility** column.



Tips for creating and finding your personal Hyperfind Queries

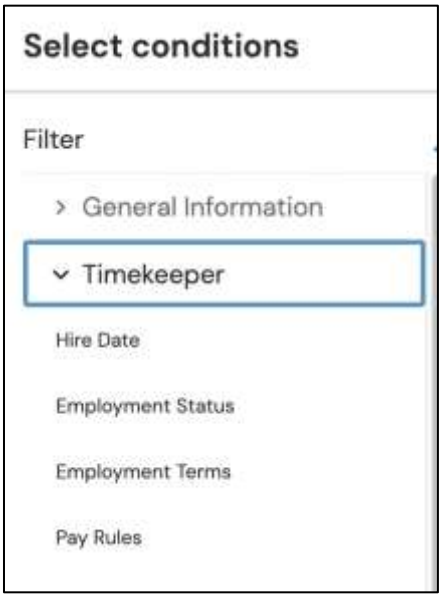
Be specific: think about how many people have the same Last Name.

The screenshots showed the initial default selections for searching by **Last Name**. You will see other options by clicking the **down arrow** next to **Search by**. Be as specific as you can in your filters; many people share Last Names so you may not get the results you intended.

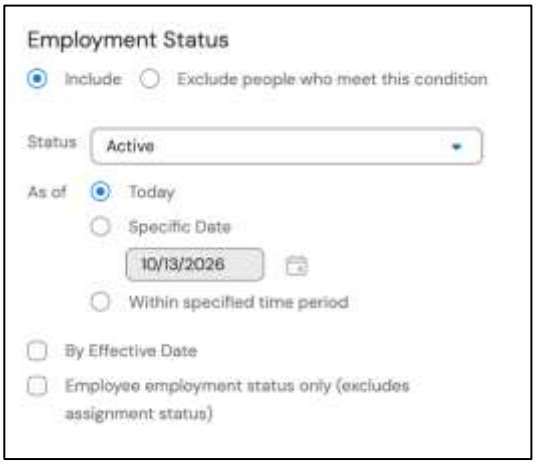


Be aware of employment status: If you want active employees only, you must include that filter in your Hyperfind.

Under the **Timekeeper Filter,** select **Employment Status**.



In the **Employment Status** filter, you can make your selections about what Employment **Status** you want to include in your Hyperfind.

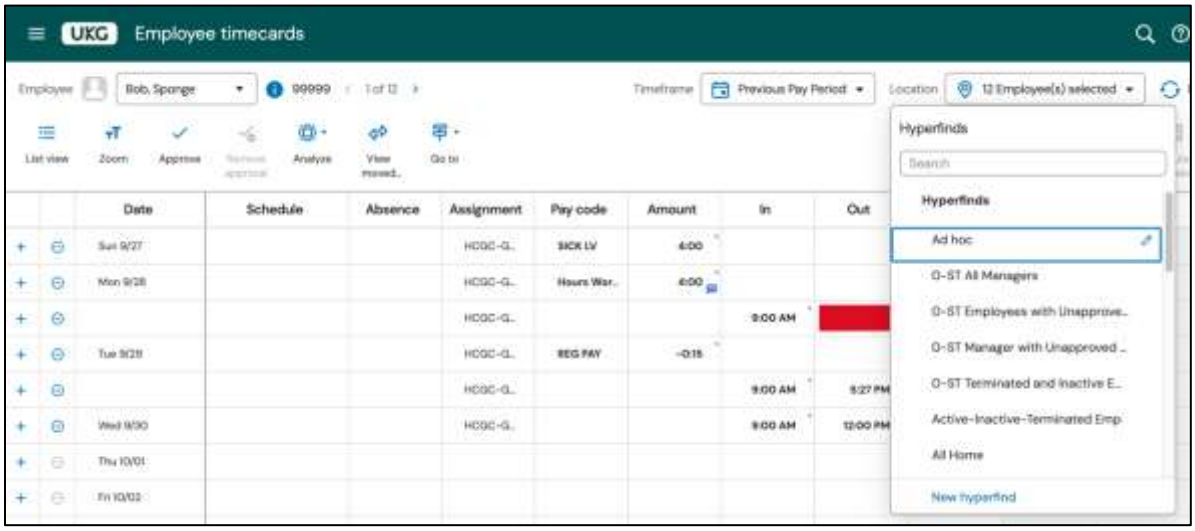


Once you have selected the Employment Status you desire, click **Add**. Keep in mind that you are adding that condition to your **Selected Conditions** box at the bottom.



How do I find a Hyperfind I created from Employee Timecards?

From the **Employee Timecards** screen, click the down arrow in the **Location** box. From here you will see a list of available **Hyperfinds** as well as a **Search** function.

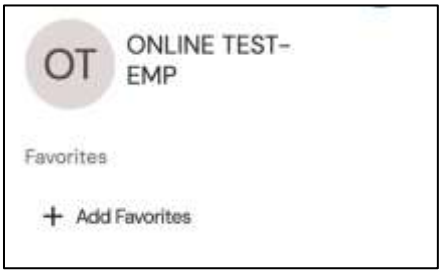


Section 8. Additional Features

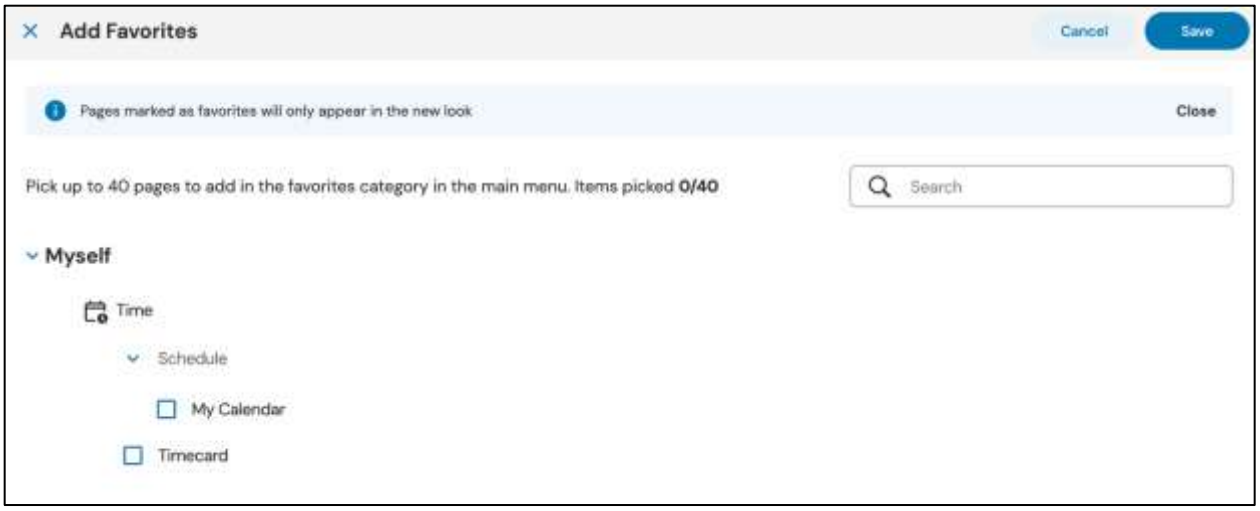
How do I add frequently used pages to Favorites?

You can personalize your Main Menu by adding your most frequently used pages to Favorites. Favorites provide quick access to multiple pages within the system.

To add a page to **Favorites**, select the **Main Menu**, then click on **Add Favorites** under the Favorites option.



Expand the menu subcategories to see available options. Select the **checkbox** next to each item you would like to add to **Favorites**. Then select **Save**.



The item will now appear on the **Main Menu** under **Favorites**.

How do I use the Bryte A.I. Search and Navigation Feature?

The **Bryte A.I. Search and Navigation action button** appears in the lower right corner of the screen on most pages in the system. You can use the system to help you quickly get to any area of the system or ask a question to find information, such as:

- Open my timecard.
- Where can I enter a time-off request?
- What is my schedule this week?

To launch the Bryte A.I. feature, select the **button** in the lower right corner of the screen.



In the **Search or ask for anything** text box at the bottom of your screen, enter your request, then select the **Search Arrow**.



Glossary

In this Glossary, we list in alphabetical order terms used in this document that may be new or unfamiliar. Please use this Glossary for reference.

- **Absence Calendar:** A feature in the scheduling module that displays employee absences and approved time-off requests.
- **Accruals:** Amount of time off an employee has earned but not yet used.
- **Allocation:** The assignment of work hours to projects/programs, expense codes, and jobs.
- **Approval:** The final step in Timecard submission, indicating confirmation of hours by the employee or Manager/Time Approver.
- **Assignment:** A single assignment or position (one job) that an employee holds within an organization, which has distinct attributes, like its own separate pay rate, schedule, and Time Approver/Manager.
- **At a Glance:** Overview or summary information displayed on the screen, often highlighting alerts or items requiring attention.
- **Attachment:** A document or file linked to instructions or information within the system, such as guides for creating Hyperfinds.
- **Audits:** A log of changes and approvals made to a Timecard, accessible in the system for verification and tracking.
- **Bryte A.I.:** A search and navigation feature that uses artificial intelligence to assist with routine tasks and answer questions within the UKG application.
- **Business Structure:** The organizational framework within the system that defines various departments, division, physical work location, expenditure codes, and jobs.
- **Completed Section:** A part of the Report Library where completed reports are stored and can be accessed by users.
- **Control Center:** A centralized location within the system where employees can manage requests and notifications.
- **Content Menu:** The Main Menu button represented by three vertical lines (often called a “hamburger”) on the main navigation, allowing access to system modules.
- **Dataview:** A custom display that provides structured access to workforce data, helping Time Admins and Managers/Time Approvers with tracking, validation, and review tasks.

- **Dataview Library:** A section within the system that provides dashboard reports for various workforce metrics and management.
- **Effective Date:** The start date on which an action, such as a delegation or schedule change, takes effect.
- **Employee Count:** The number of employees currently assigned to a manager, typically displayed in the top navigation of the Timecard screen.
- **Error Message:** A system notification indicating an issue with a task or process.
- **Extension:** An exception that allows extra time beyond the standard cutoff to complete a process (e.g., Payroll sign-off).
- **Favorites**: A feature that allows a user to add frequently used items for quick and easy access.
- **Historical Correction:** An adjustment made to Timecards already processed by Payroll.
- **Hourly View Timecard:** A Timecard format designed for hourly employees, showing detailed punch information and hours worked.
- **Hyperfind:** A query or filter that allows users to select specific groups of employees based on criteria, such as location, department, or job status.
- **In and Out Punch:** Entries on a Timecard that reflect the start (In) and end (Out) times for an employee's work shifts.
- **Intranet:** An organization’s internal website accessible only by its staff.
- **Kronos:** A workforce management tool used for timekeeping.
- **Labor Category:** A way to organize information about what an employee has worked on (i.e., job, employee’s assigned job location, etc.).
- **Landing Page:** The initial or main page presented to users upon login, also referred to as the Home Page.
- **Locations and Hyperfinds:** A filtering tool within the system that allows users to select specific groups of employees based on criteria such as department, role, or location.
- **Manager/Time Approver:** Individual with the authority to approve other employees’ Timecards.
- **Multi-Pay Employee:** An employee who holds multiple job roles or pay assignments within the organization.

- **Multiple Assignment:** Allows one employee to hold multiple assignments or positions (more than one job) at one time, each with its own separate pay rate, schedule, and Time Approver. It is all under one Human Resources Information Systems (HRIS) and UKG record.
- **Pay Period:** The recurring schedule by which employees are paid biweekly.
- **Payroll Processing:** The administrative task of managing and calculating employee wages, taxes, and other deductions on a scheduled basis.
- **Pay Code:** Codes used to classify types of hours worked, such as regular, overtime, or holiday hours.
- **Position:** A single assignment or position (one job) that an employee holds within an organization, which has distinct attributes, like its own separate pay rate, schedule, and Time Approver/Manager.
- **Query:** A saved search or set of criteria in the system for quickly filtering information.
- **Report Library:** A storage area within the system where Managers can access and run workforce reports.
- **Scheduler:** A system module that allows managers to define and manage work schedules for employees.
- **Share Option:** A feature allowing users to print or share information.
- **Shift Template:** A pre-defined schedule or shift setup that can be applied to employee schedules.
- **Single Sign-On (SSO):** An authentication process allowing users to access multiple applications with one set of login credentials.
- **Task Assignment:** A specific responsibility or item requiring action, assigned to a Manager or employee within the system.
- **Tiles:** Blocks on the user interface that link to various sections or functions.
- **Time Admin (Time Administrator):** An individual authorized to finalize time records within the timekeeping system.
- **Timecard:** A digital record of hours worked by an employee.
- **Totals Tab:** A section where cumulative hours or pay period summaries are displayed.
- **Transfer:** A function allowing employees to assign time worked to specific projects/programs, jobs, and expenditure codes.

- **UKG (Ultimate Kronos Group):** The company that provides workforce management and human resource management services.
- **UKG Workforce Pro:** M-NCPPC's time and attendance system.
- **URL (Uniform Resource Locator):** A web address.