EBC

PAYROLL • HR SERVICES

Kronos | Workforce Ready

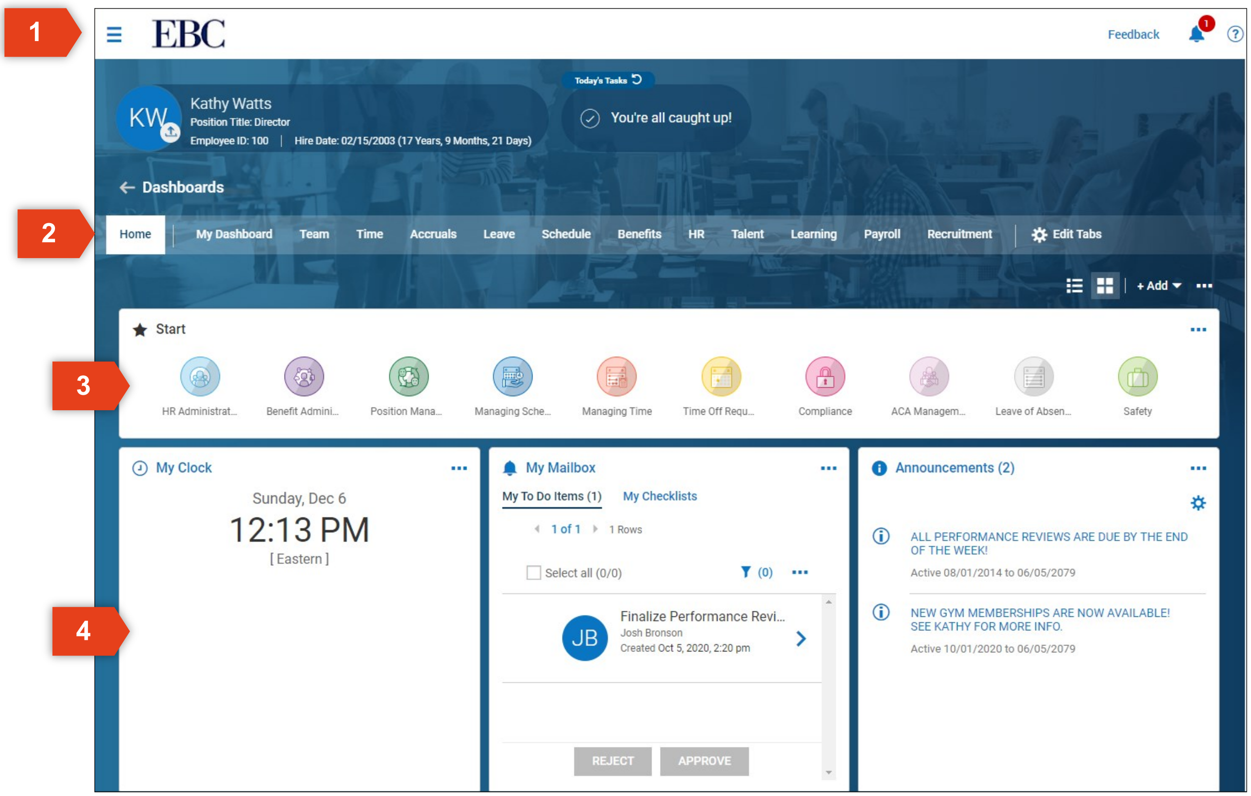
Training Guide

Kronos Workforce Ready is one unified platform to help you manage your *entire* workforce from pre-hire to retire — whether they're salaried, hourly, full time, or part time. Use this guide to help navigate the basics of using the Workforce Ready system.

Dashboard Overview

From the Dashboard, you can navigate using any of the following features:

1. Main Menu
2. Quick Access Tabs
3. Favorites
4. Widgets



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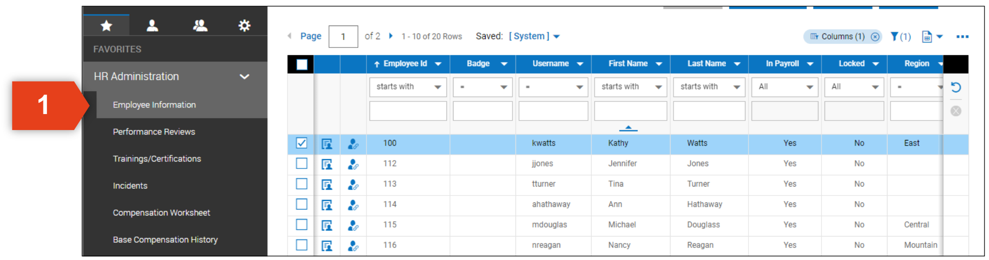
Managing Employee Data

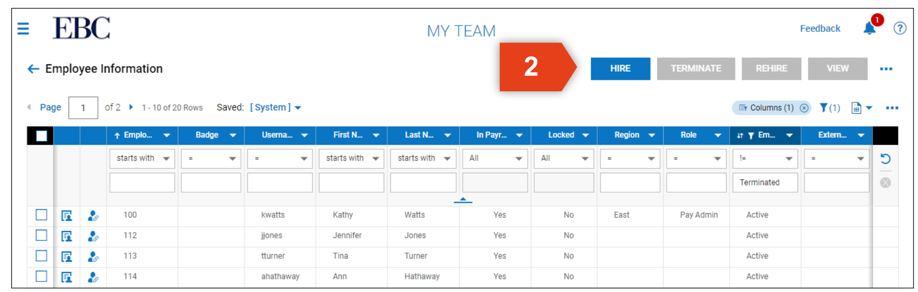
This section will review the basics of reviewing and updating employee information.

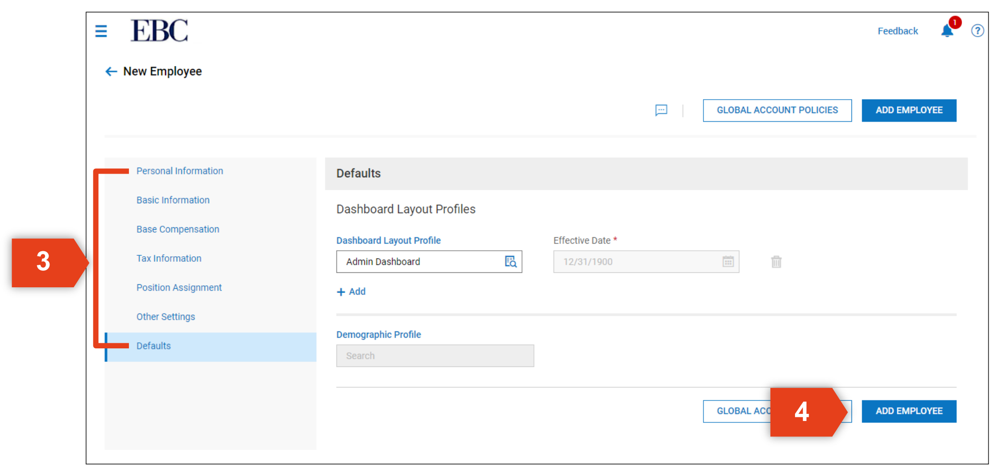
Entering a New Employee

To manually hire a new employee,

1. Open the Main Menu, click HR Administration, then click Employee Information.
2. Click on HIRE at the top.
3. Enter employee information for each of the sections in the New Employee Menu.
4. Click ADD EMPLOYEE once you are complete.



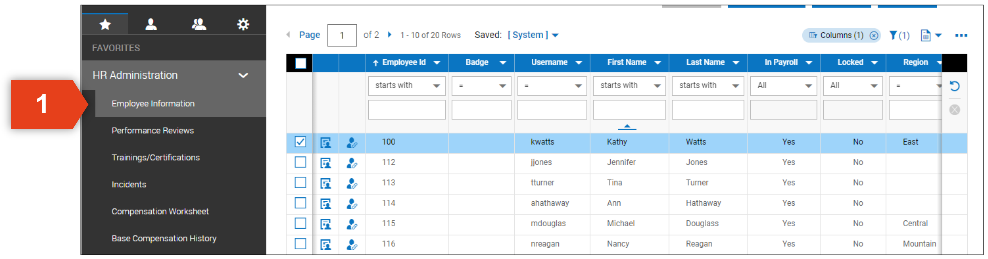


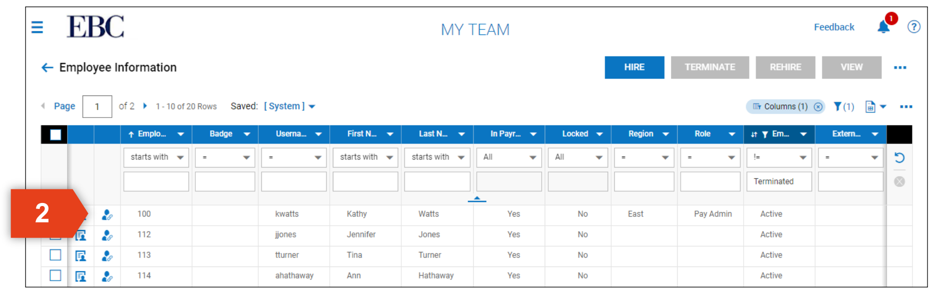


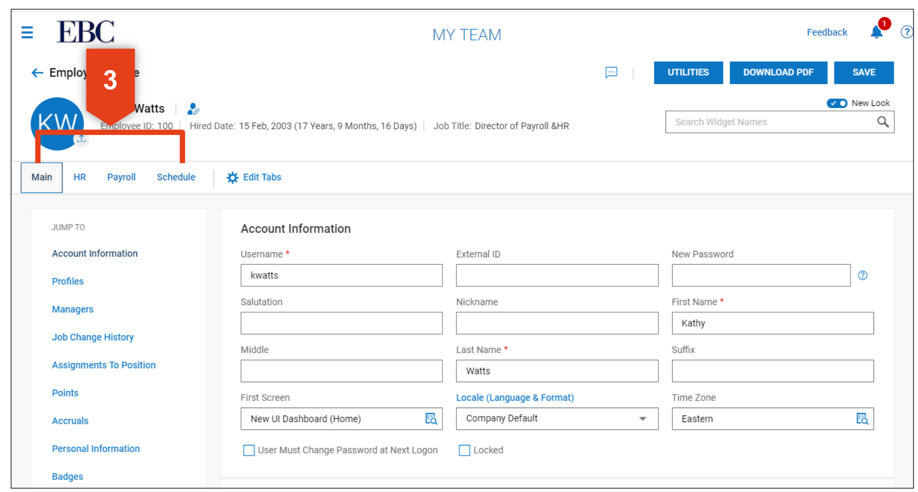
Updating Employee Information

To edit employee information,

1. Open the Main Menu, click HR Administration, then click Employee Information.
2. Locate the employee, then click the Employee Information icon.
3. Click on the four tabs to access and edit the employee information within that category:
   - Main
   - HR
   - Payroll
   - Schedule



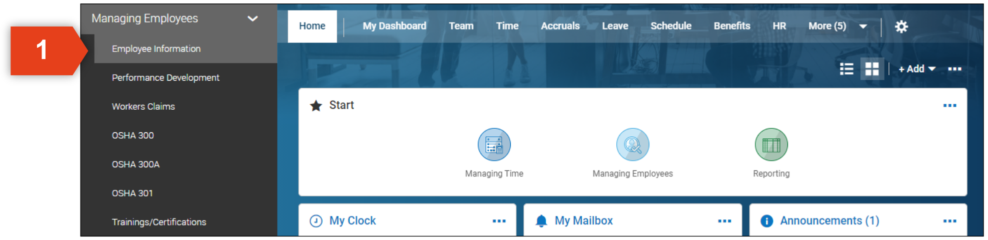


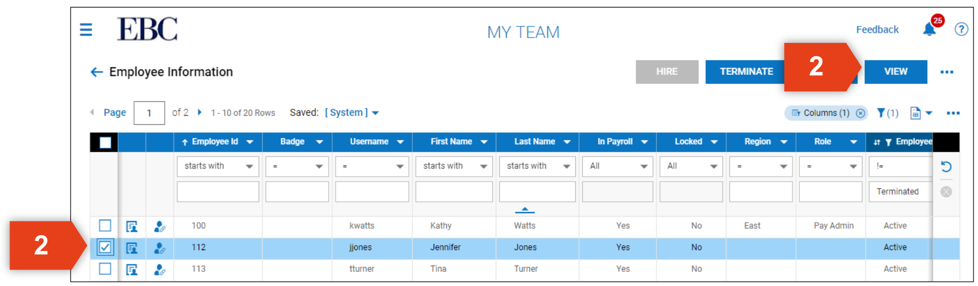


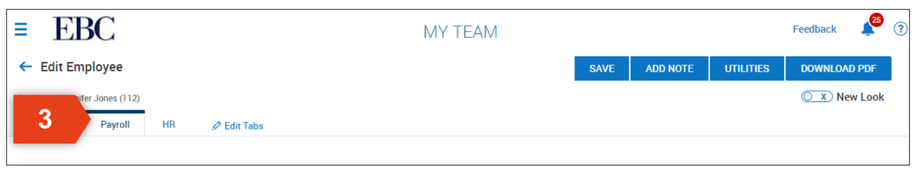
Direct Deposit Setup

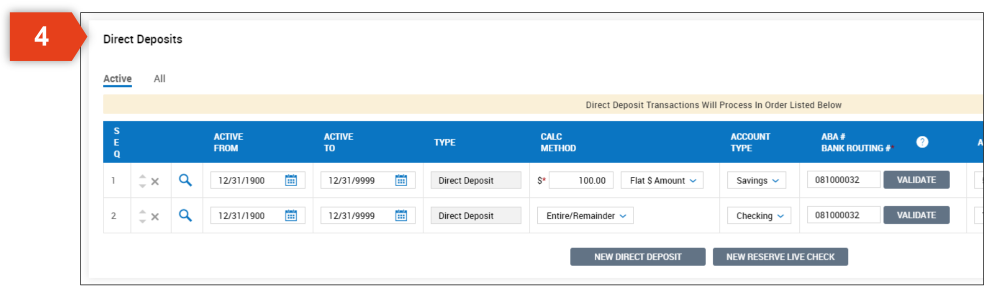
To set up a direct deposit for an employee,

1. Open the Main Menu, click Managing Employees, then Employee Information.
2. Select the employee, then click VIEW.
3. Click on the payroll tab.
4. Scroll down to Direct Deposits.



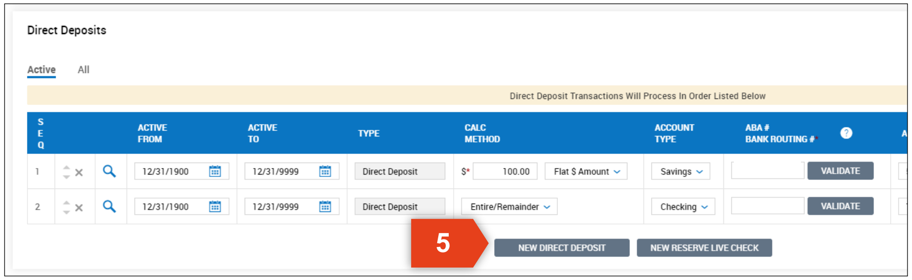


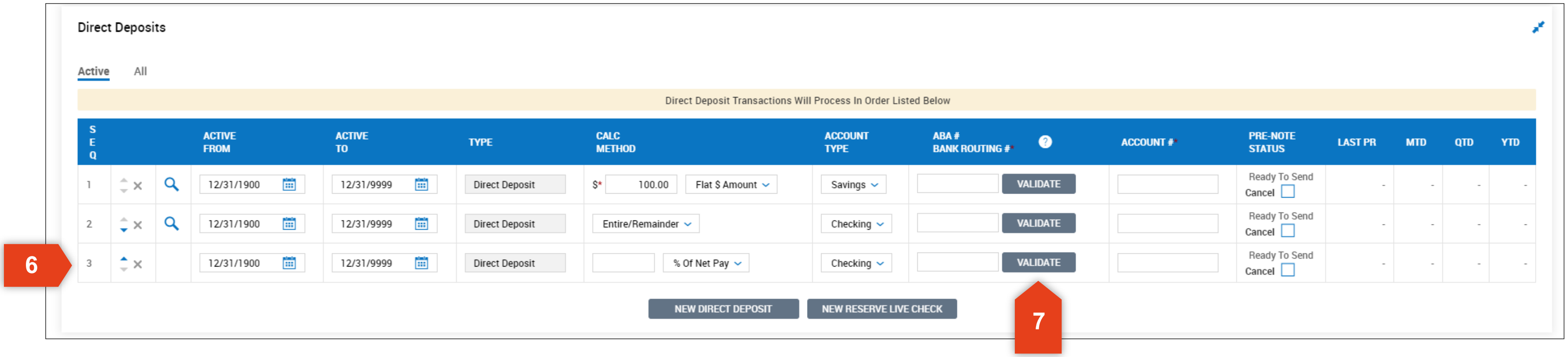




Direct Deposit Setup

5. To add a direct deposit, click NEW DIRECT DEPSOSIT.
6. Enter the banking information.
7. Click VALIDATE.

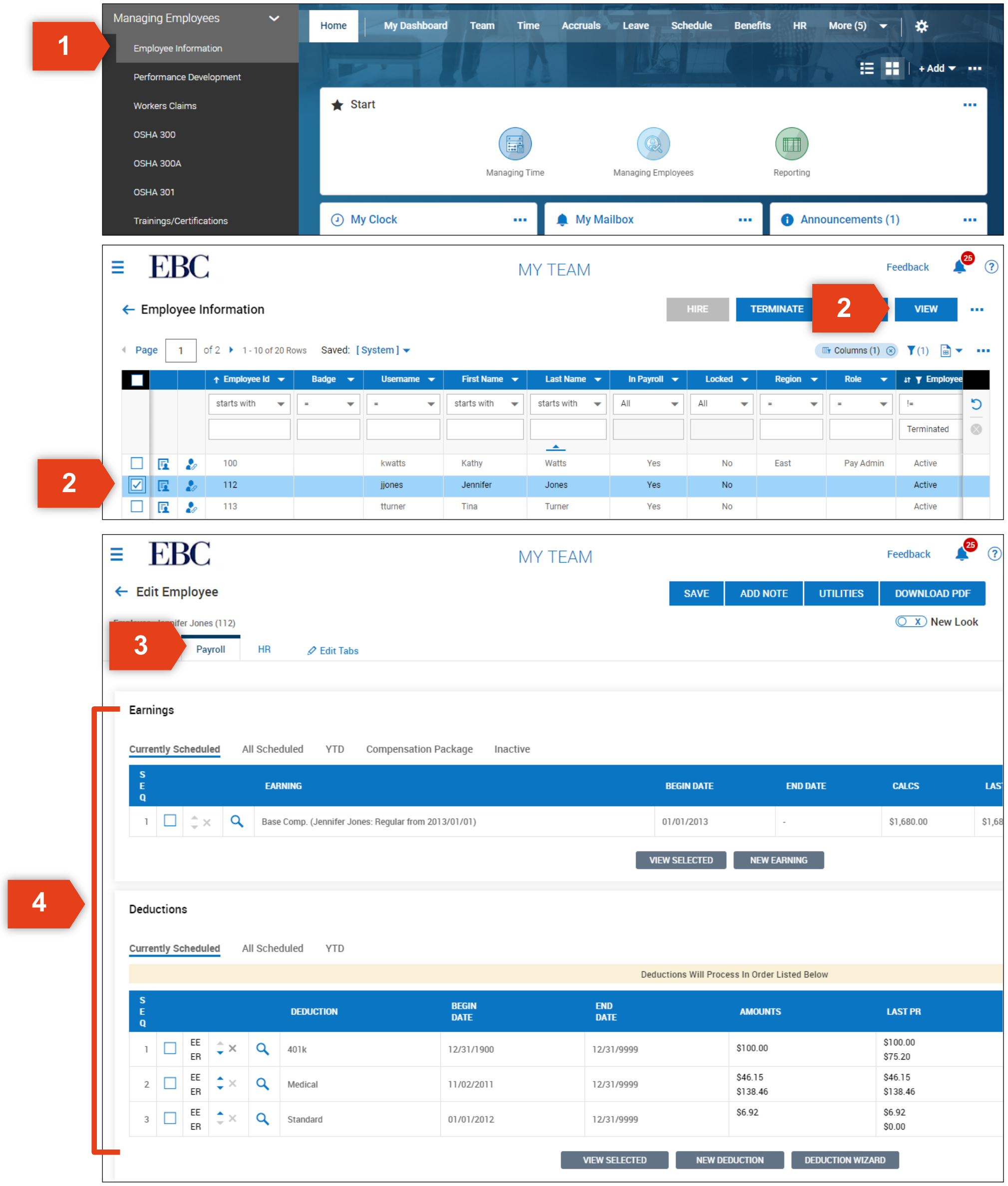




Earnings and Deduction Setup

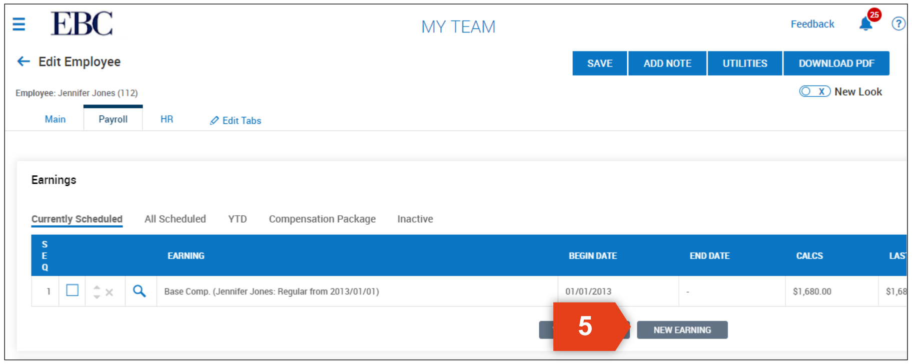
To set up an earning or deduction for an employee,

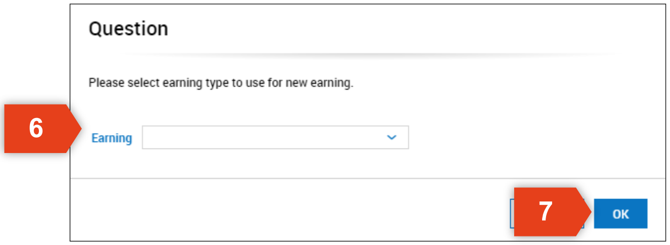
1. Open the Main Menu, click Managing Employees, then Employee Information.
2. Select the employee, then click VIEW.
3. Click on the Payroll tab to access payroll options.
4. Scroll to view Earnings and Deductions.

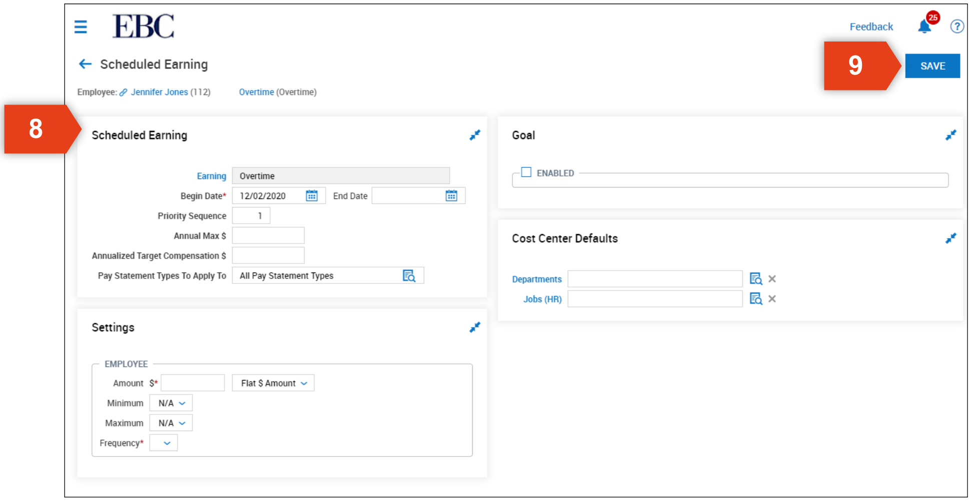


Earnings and Deduction Setup

5. To add an earning, click NEW EARNING.
6. Choose an earning type from the drop down.
7. Click OK.
8. Enter earning information on the Scheduled Earning page.
9. Click SAVE once you have completed this entry.

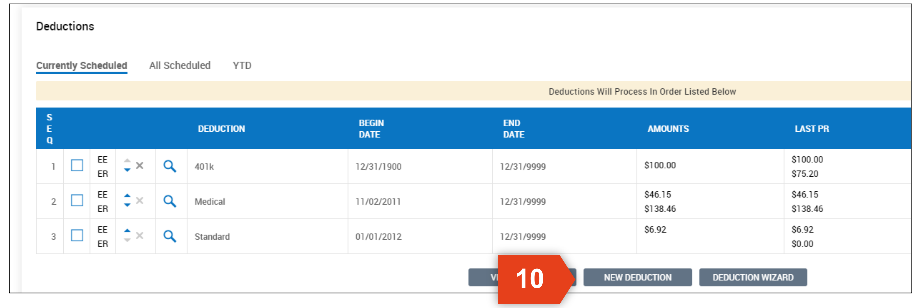


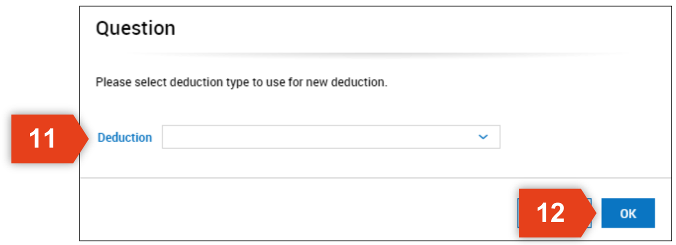


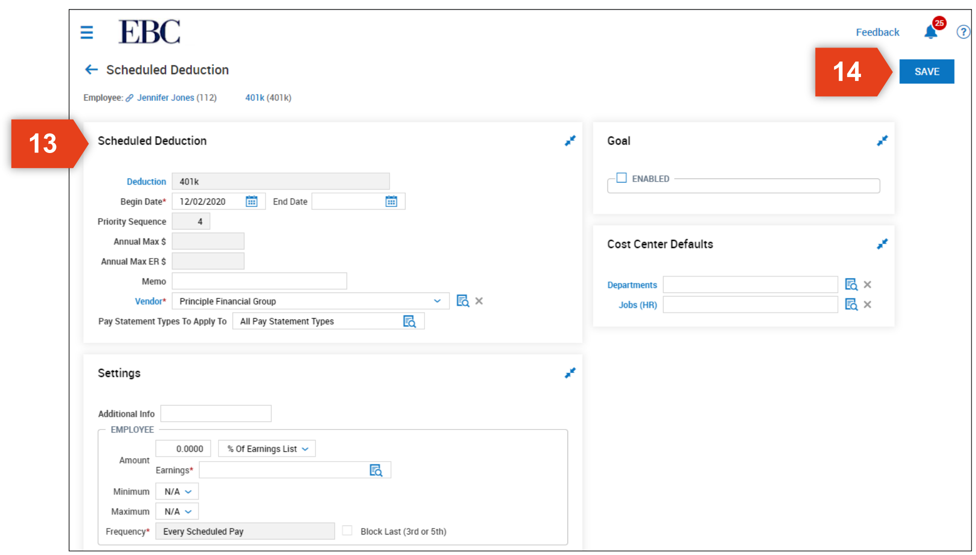


Earnings and Deduction Setup

10. To add a deduction, click NEW DEDUCTION.
11. Choose an deduction type from the drop down.
12. Click OK.
13. Enter deduction information on the Scheduled Deduction page.
14. Click SAVE once you have completed this entry.



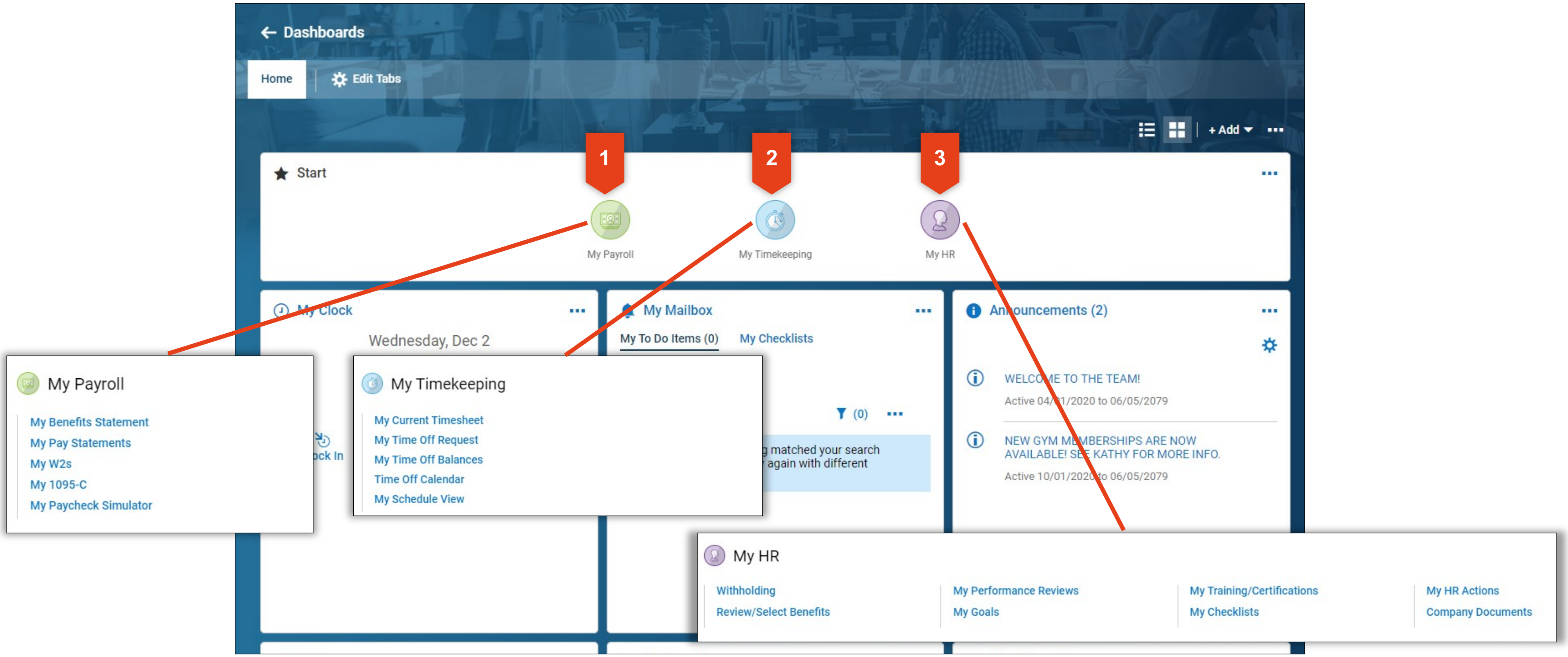




Employee Self Service

From the dashboard, employees can access,

1. My Payroll: Access benefit and pay statements.
2. My Timekeeping: Access timesheets, accruals, schedules, and request time off.
3. My HR: Access performance reviews and goals, company documents, and make updates to tax withholdings, and benefits.



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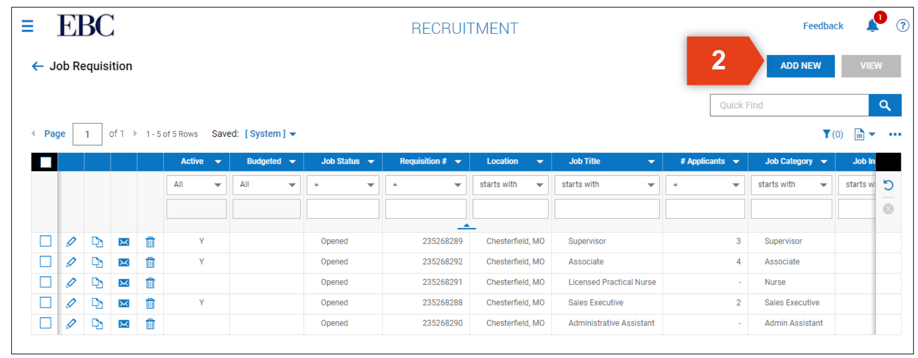
Recruiting

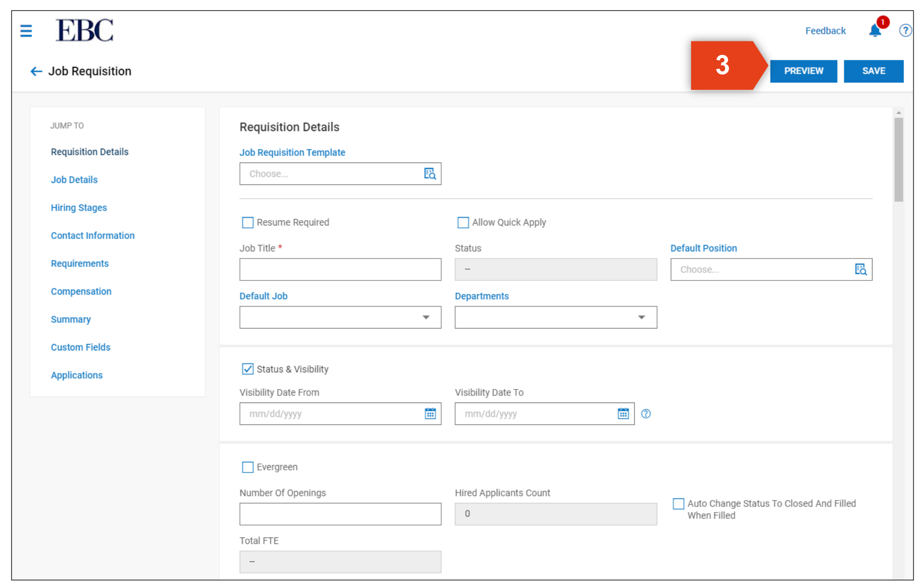
This section will review the basics of creating and updating information for jobs postings.

Create a Job Posting

To create a job posting,

1. Open the Main Menu, click Recruitment, then click Job Requisition.
2. Click on ADD NEW to start a new job posting.
3. Enter position details for each of the sections in the Job Requisition Menu.
4. Click PREVIEW to review the posting before sav-ing.
5. Click SAVE to save the posting.

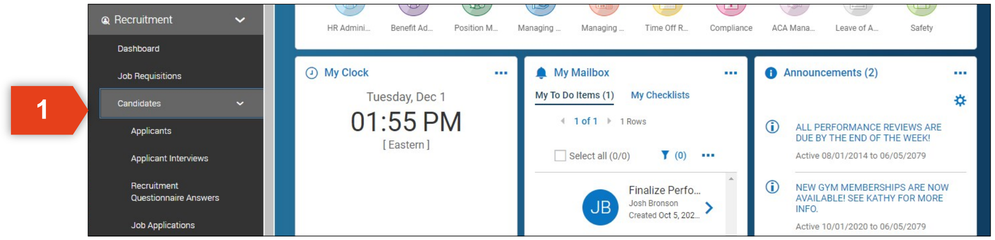


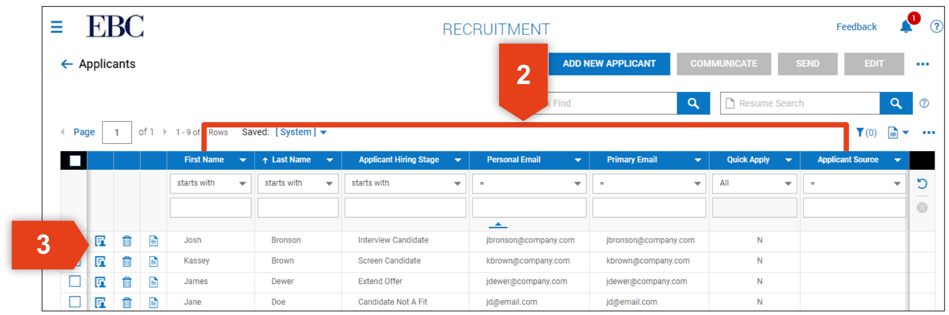


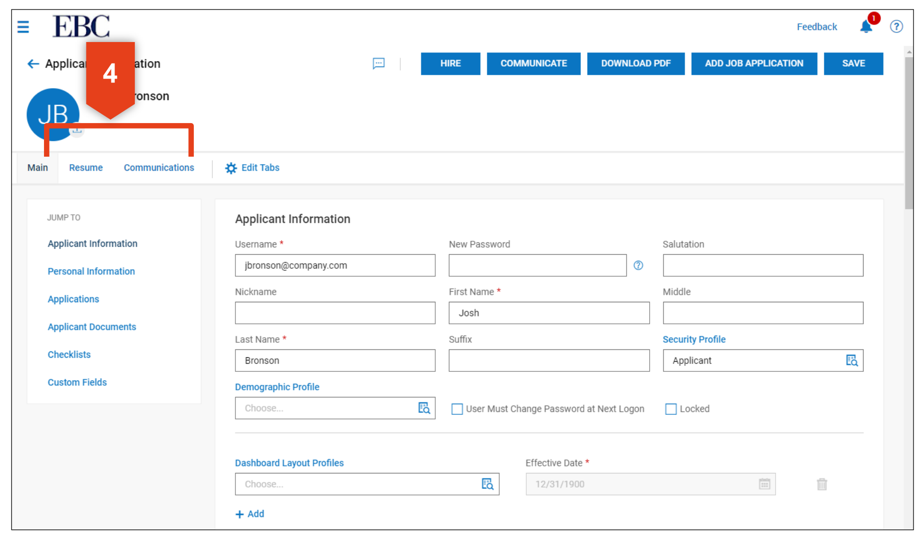
Review and Update Candidates

To review and update candidates,

1. Open the Main Menu, click Recruitment, Candidates, then click Applicants.
2. Locate the candidate you want to review by scrolling through the list or using the filter and search options.
3. Once you have located the candidate, click on the View Applicant icon.
4. Click on the three tabs to access and edit the candidate information within that category:
   - Main
   - Resume
   - Communication



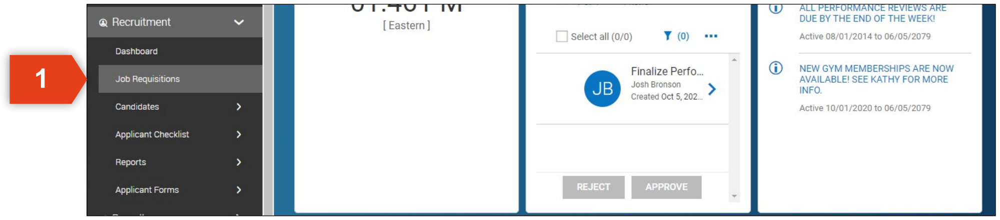


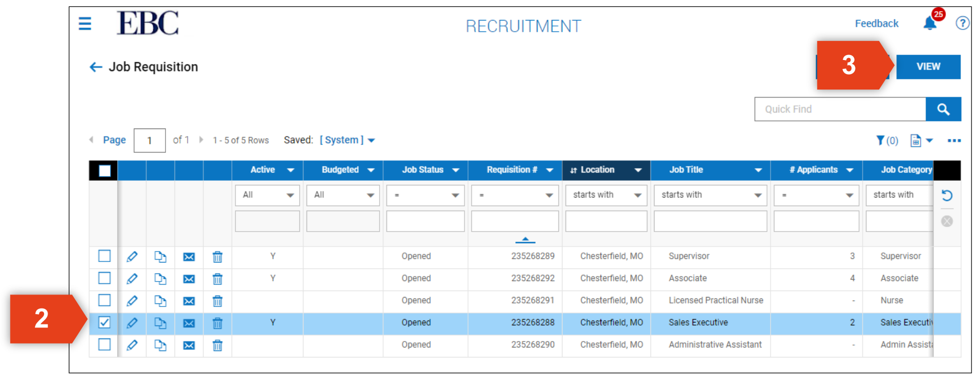


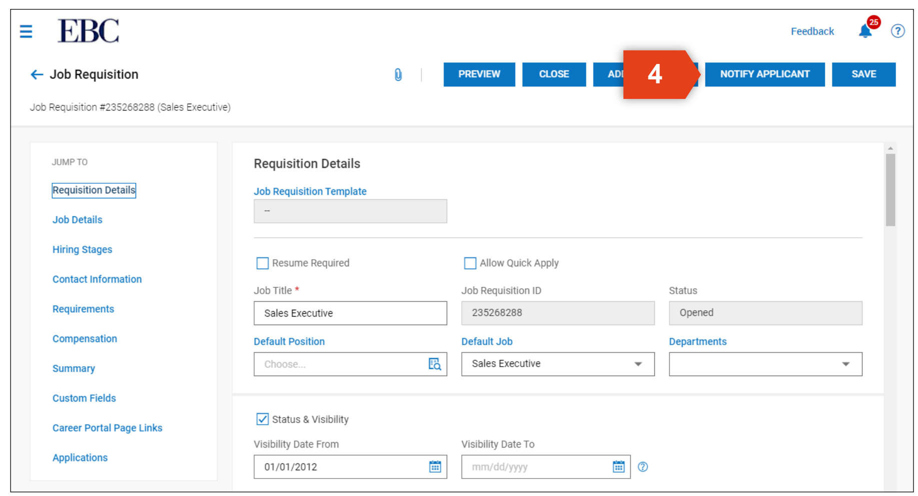
Make an Offer

To make an offer,

1. Open the Main Menu, click Recruitment, then Job Requisitions.
2. Select the job for which you want to make an offer.
3. Click VIEW.
4. Click NOTIFY APPLICANT.

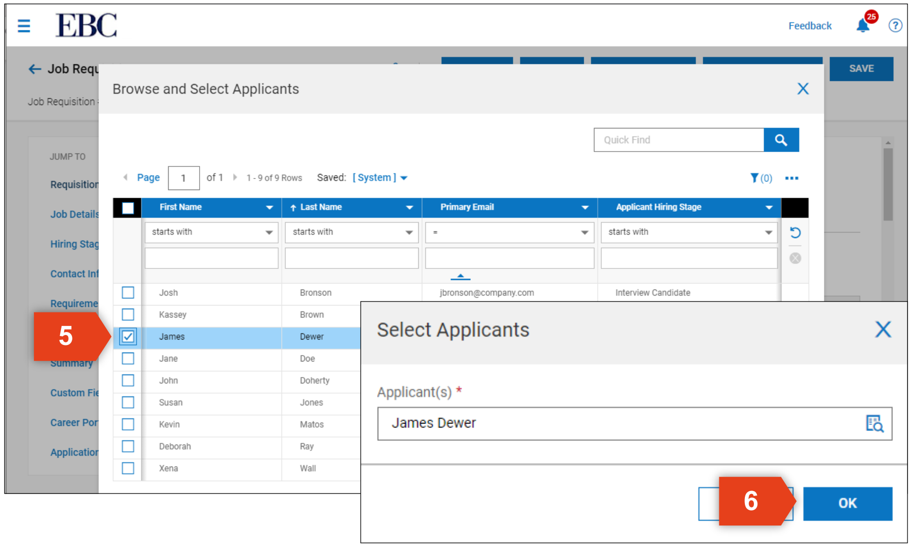


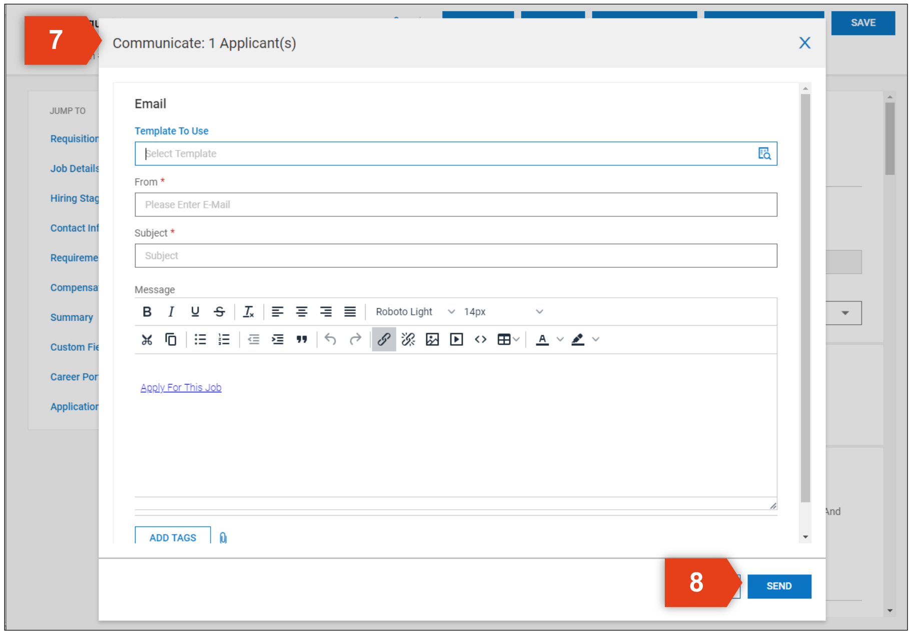




Make an Offer

5. Select the applicant to whom you want to make an offer.
6. Click OK.
7. Create communication using the Extend Offer template.
8. Click SEND.

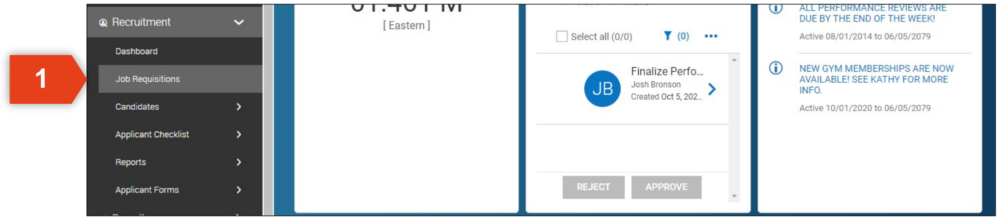


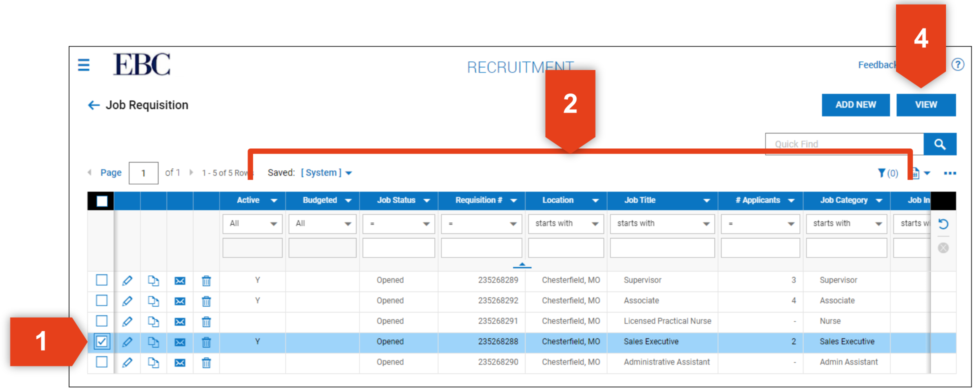


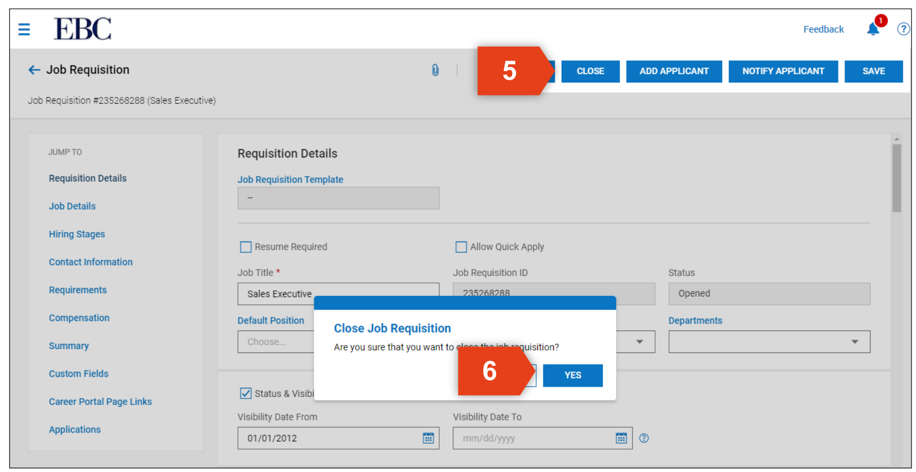
Close a Job Posting

To close a job posting,

1. Open the Main Menu, click Recruitment, then click Job Requisition.
2. Locate the job posting by scrolling through the list or using the filter and search options.
3. Check the box to the left of the job posting to select.
4. Click VIEW.
5. Click CLOSE.
6. A confirmation message will ask if you want to close this job—click YES.







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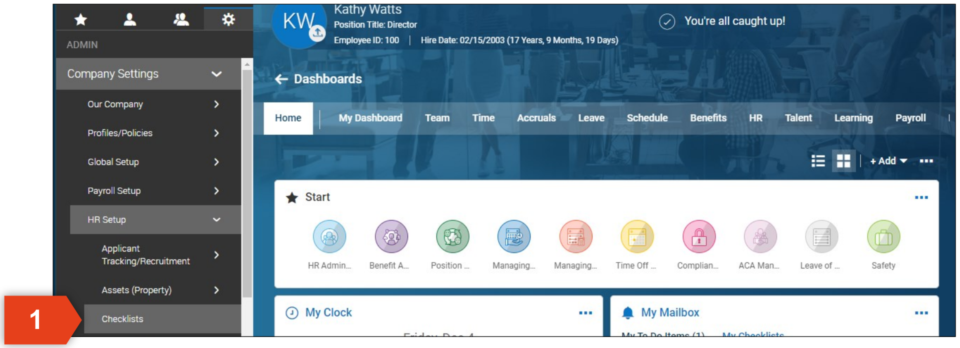
Onboarding a New Employee

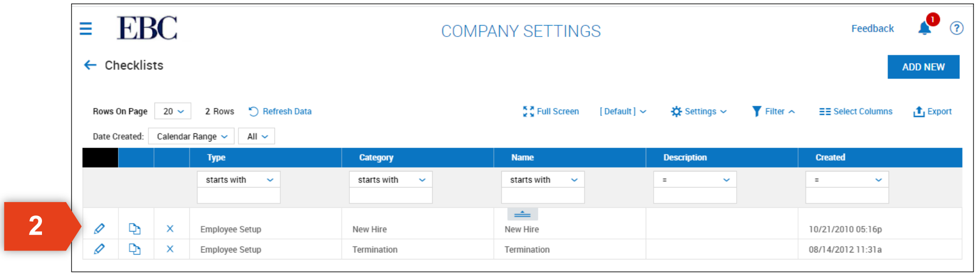
This section will review the basics of onboarding a new employee using a New Hire checklist.

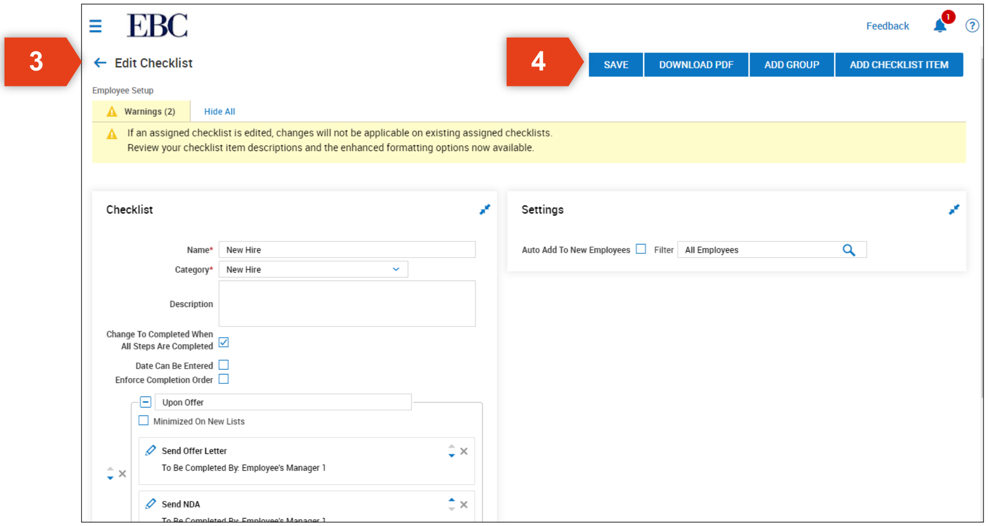
Manage New Hire Checklist

To manage a New Hire checklist,

1. Open the Main Menu, Click Company Settings, HR Setup, then Checklists.
2. Click the edit icon to edit an existing checklist.
3. Here you can edit current checklist items or you may click ADD CHECKLIST ITEM.
4. Click SAVE if any changes have been made.



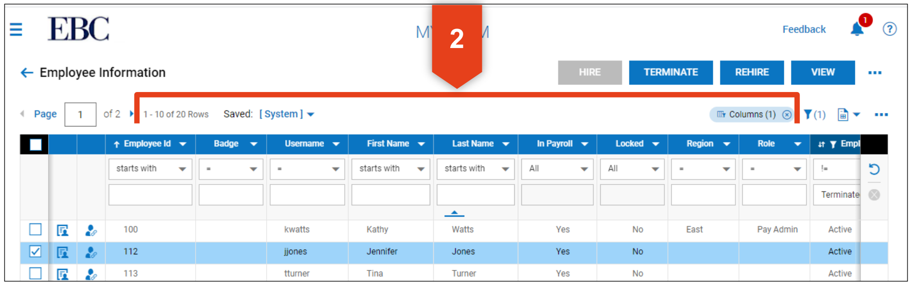


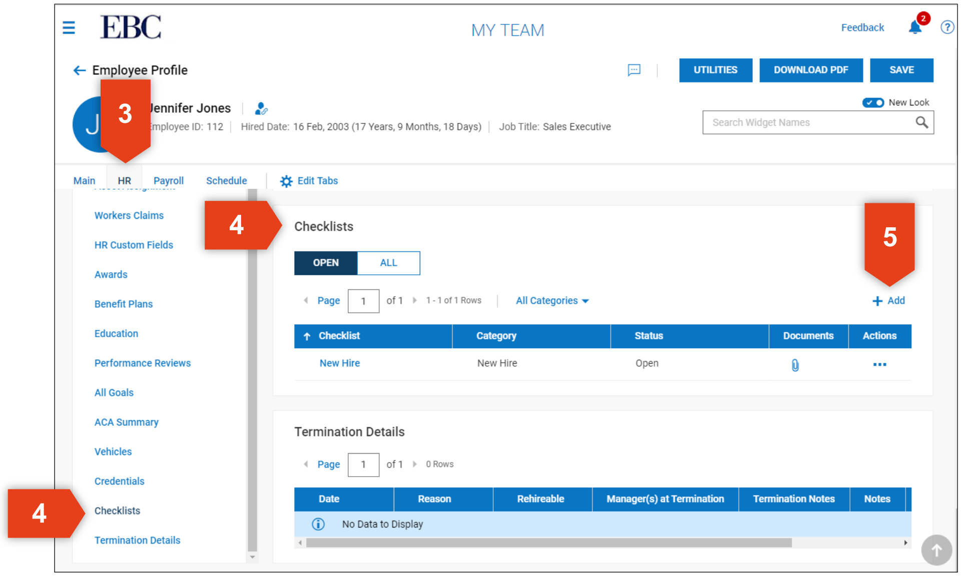


Issue New Hire Checklist

To issue a New Hire checklist,

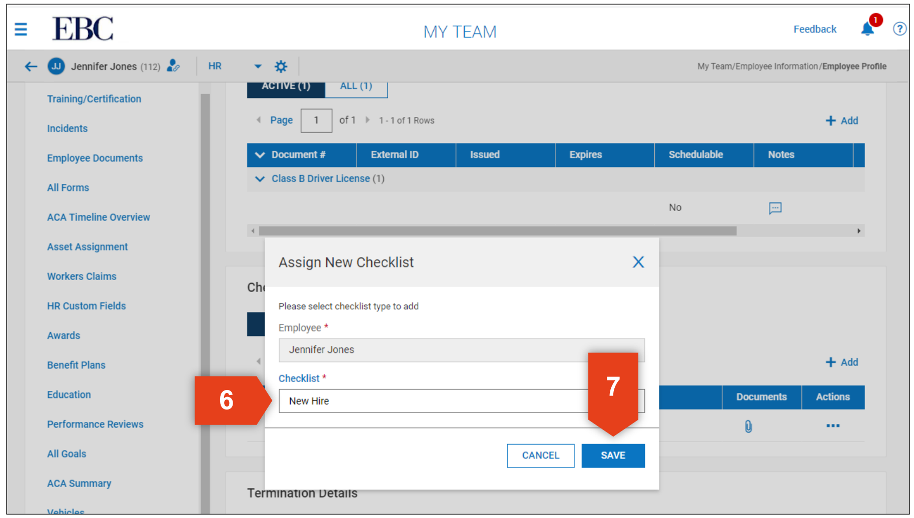
1. Open the Main Menu, click My Team, then Employee Information.
2. Use the filter and sort options to locate the employee for whom you will be managing documents.
3. Click on the HR tab.
4. Click on Checklists from the navigation panel or scroll down to Checklists.
5. Click +Add to start a new checklist.

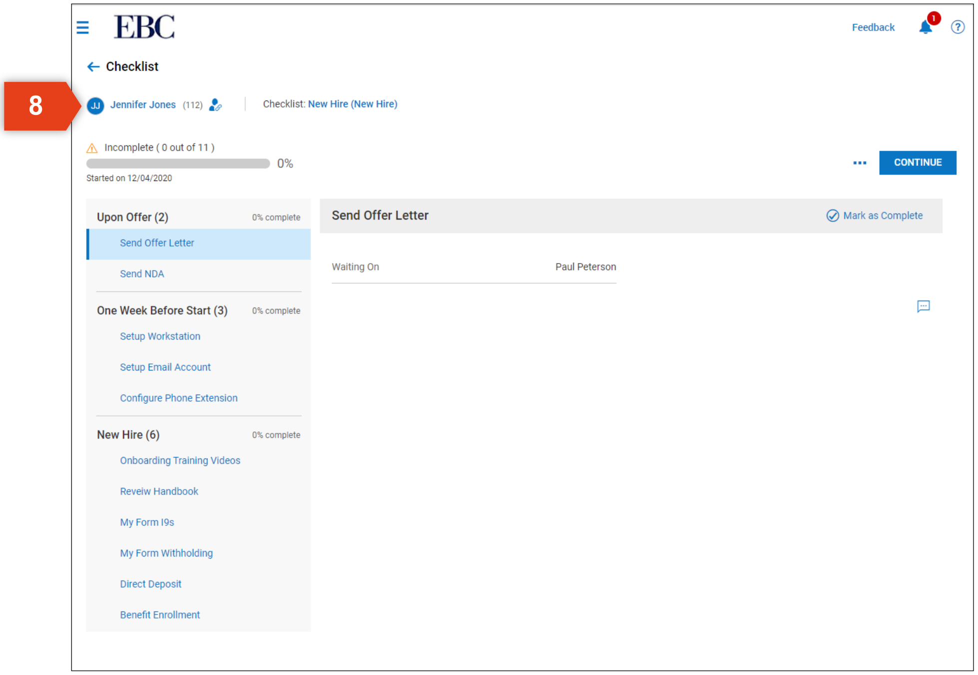




Issue New Hire Checklist

6. Choose the New Hire checklist.
7. Click SAVE.
8. The checklist will be displayed.

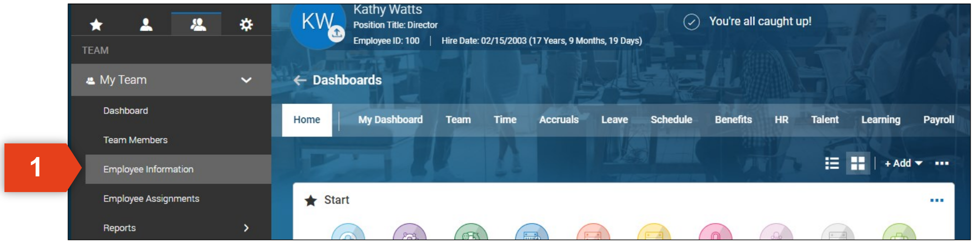


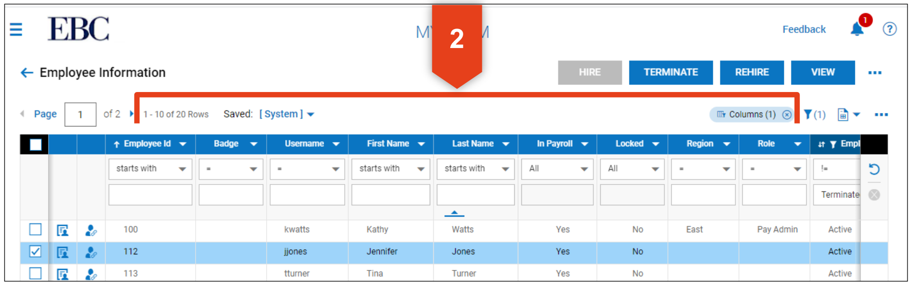


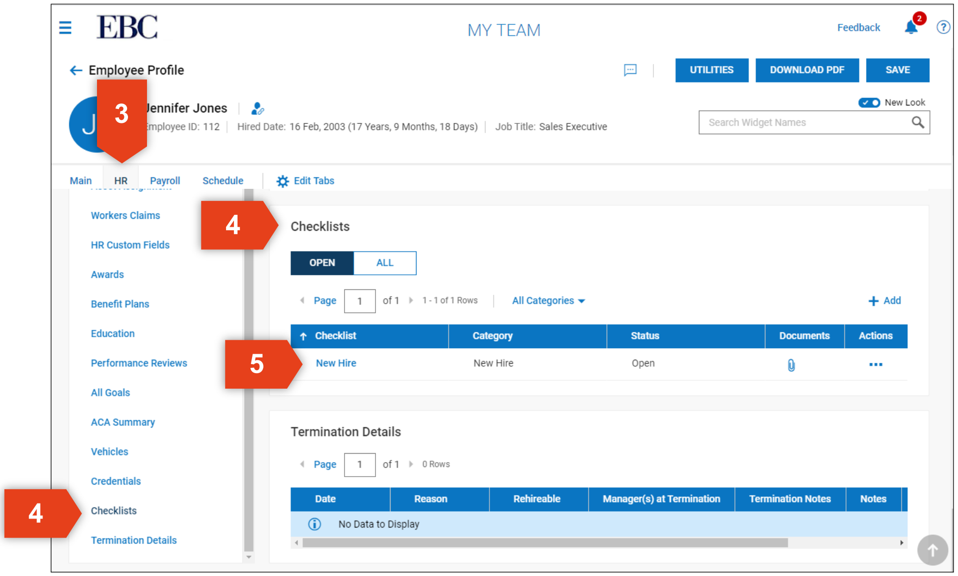
Monitor Checklist Completion

To monitor a New Hire checklist,

1. Open the Main Menu, click My Team, then Employee Information.
2. Use the filter and sort options to locate the employee for whom you will be managing documents.
3. Click on the HR tab.
4. Click on Checklists from the navigation panel or scroll down to Checklists.
5. Click on the New Hire checklist.

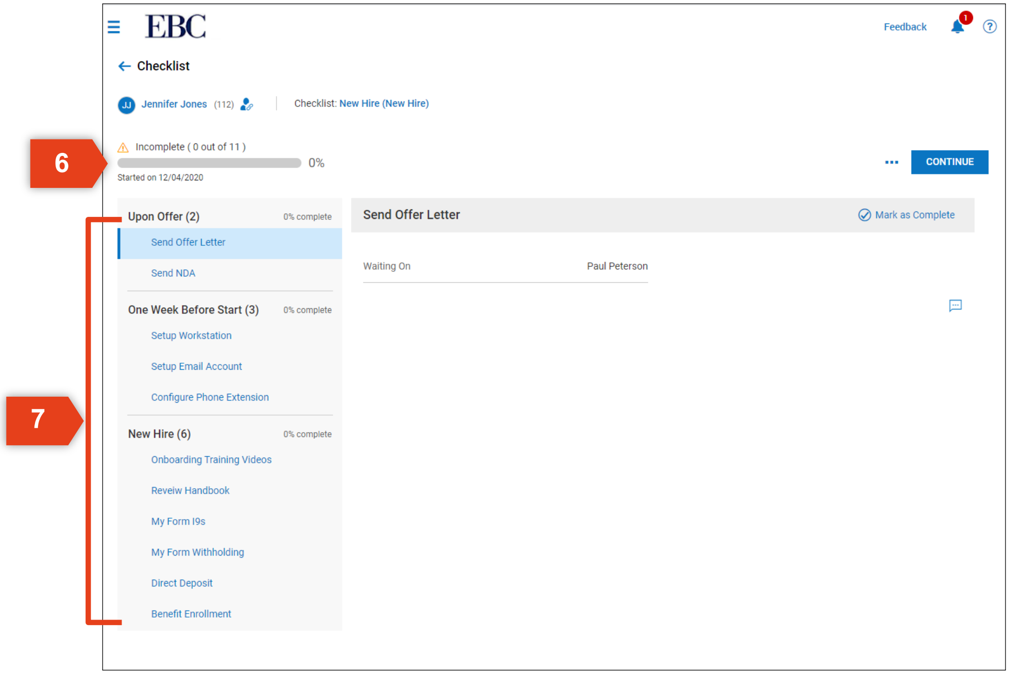






Monitor Checklist Completion

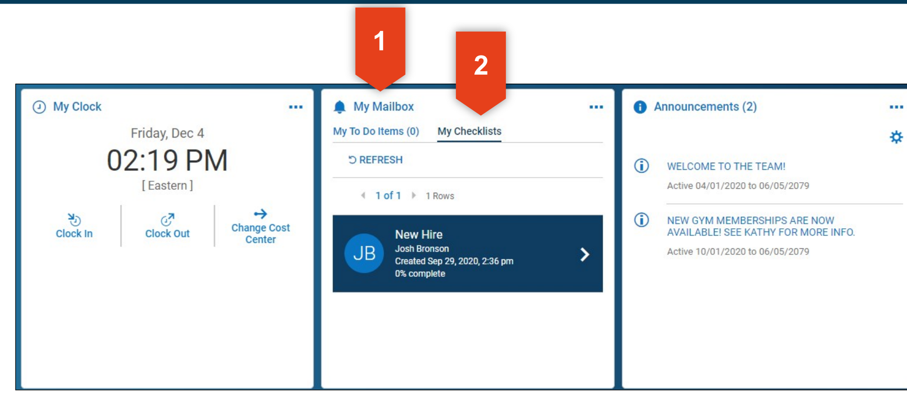
6. An overview of completion is listed at the top of the page.
7. Click on each item in the navigation panel to review completion details.

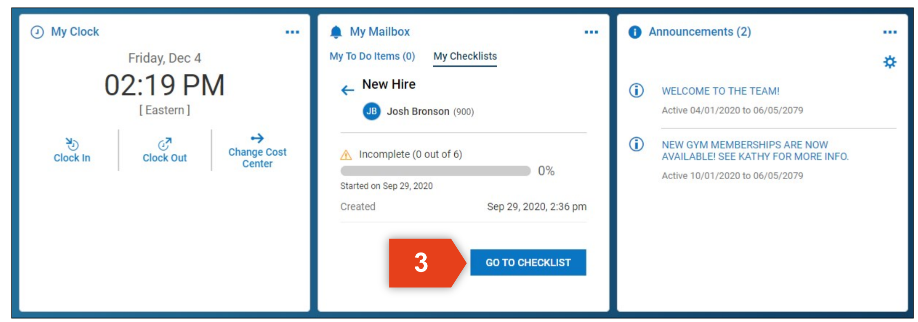


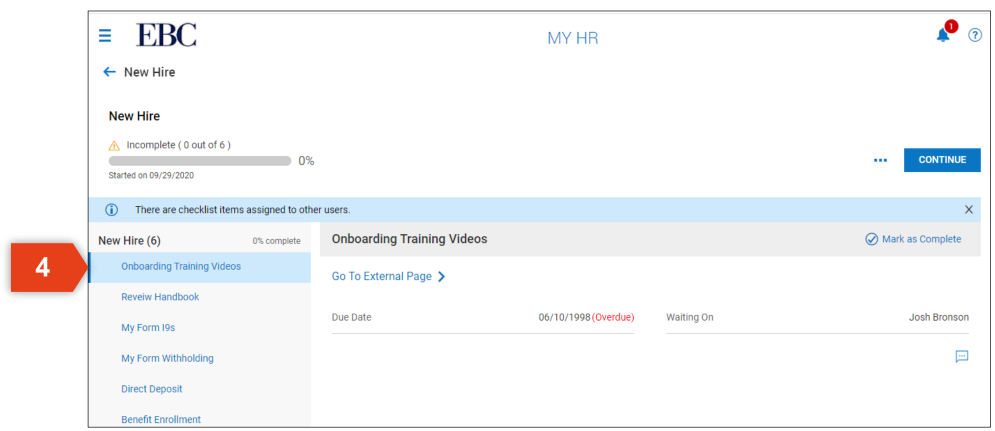
Complete a Checklist

To complete a checklist,

1. Locate the My Mailbox widget on the dashboard.
2. Click on My Checklists.
3. Click on the Checklist you want to complete (if there are more than one) then click GO TO CHECKLIST.
4. Complete each item in the checklist by clicking CONTINUE or by clicking through the navigation panel.







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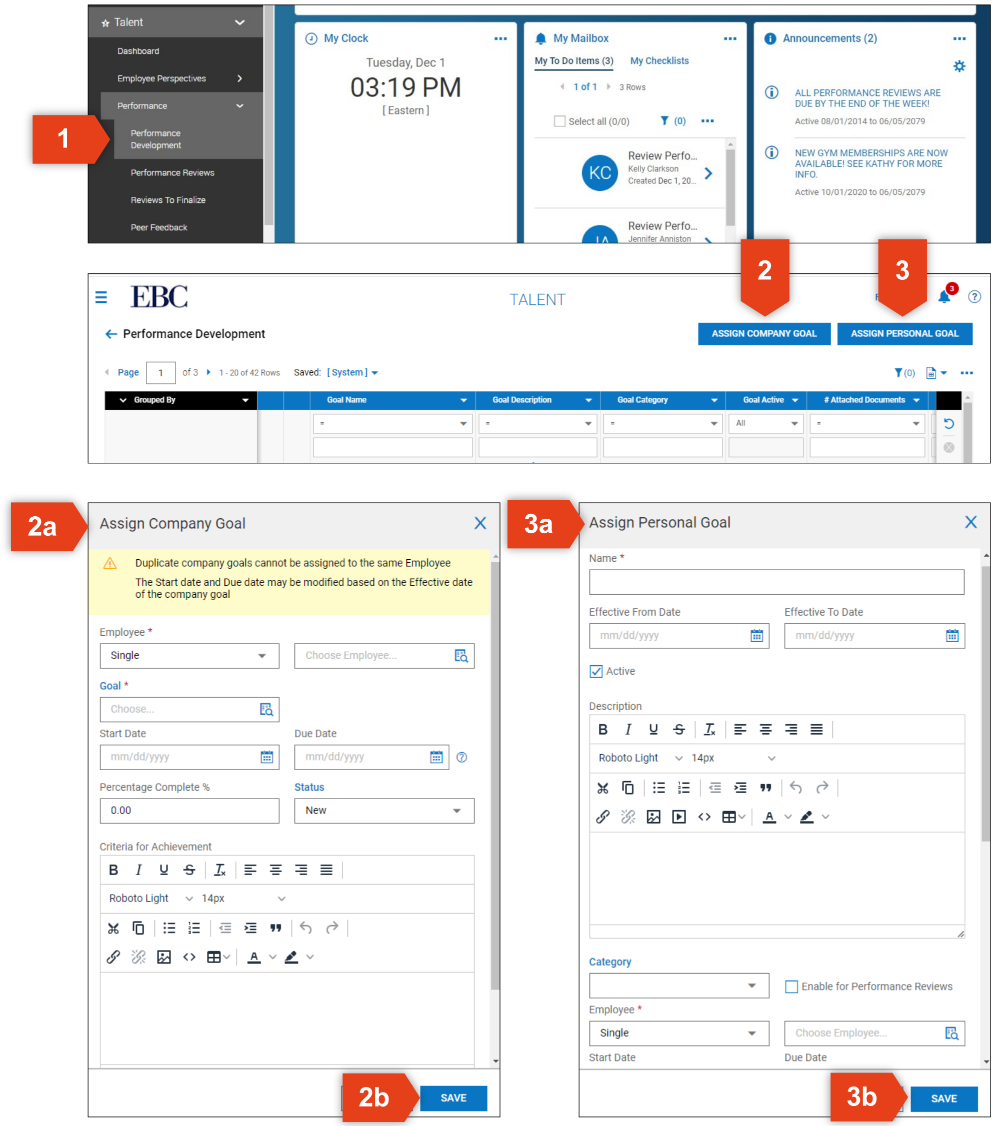
Managing Performance Reviews

This section will review the basics of creating and issuing a performance review.

Assign Goals

To assign personal and professional goals,

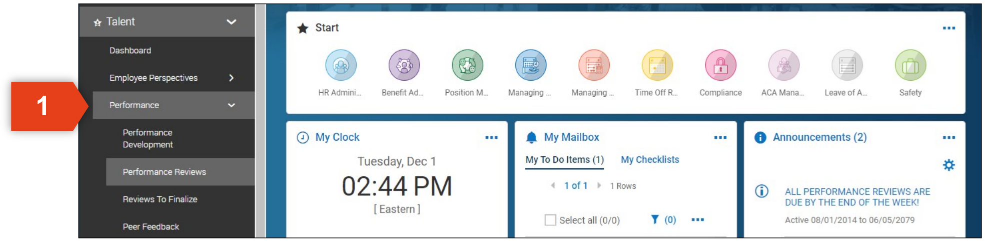
1. Open the Main Menu, click Talent, Performance, then click Performance Development.
2. To create a professional goal, click ASSIGN COMPANY GOAL.
    a. The Assign Company Goal window will display. Enter the details for the professional goal.
    b. Click SAVE.
3. To create a personal goal, click ASSIGN PERSONAL GOAL.
    a. The Assign Personal Goal window will display. Enter the details for the personal goal.
    b. Click SAVE.

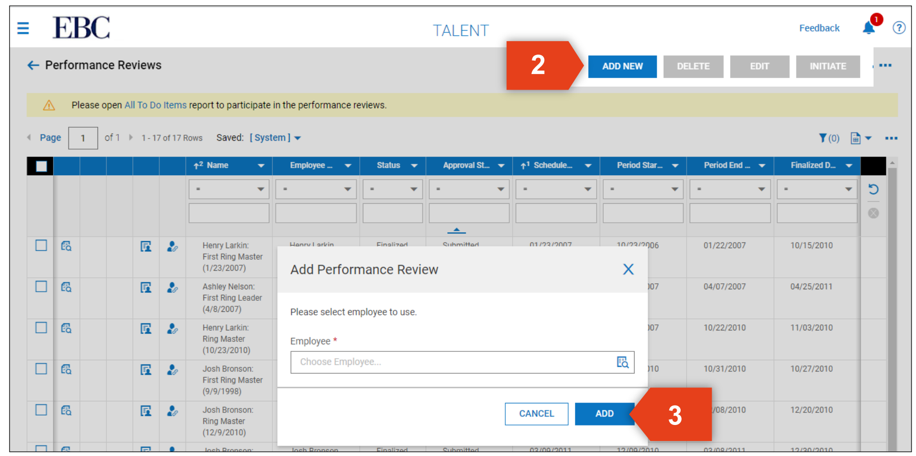


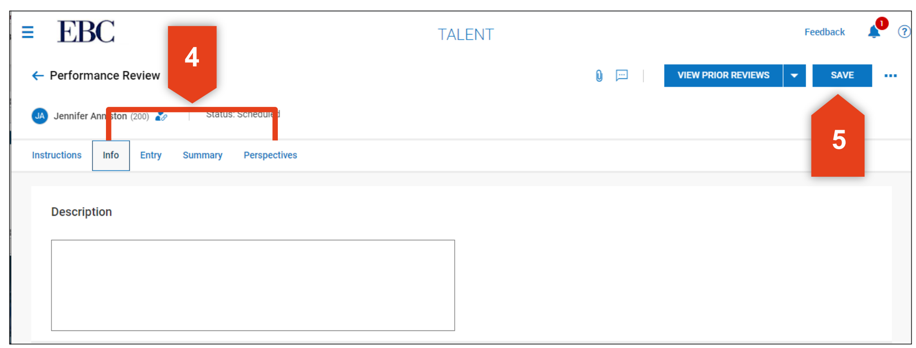
Create a Performance Review

To create a performance review,

1. Open the Main Menu, click Talent, Performance, then click Performance Reviews.
2. Click ADD NEW.
3. The Add Performance Review window will open. Choose an employee, then click ADD.
4. Click on the four tabs to access and edit the performance information within that category:
    - Info
    - Entry
    - Summary
    - Perspectives.
5. Click SAVE once you have completed entering in the performance review details.



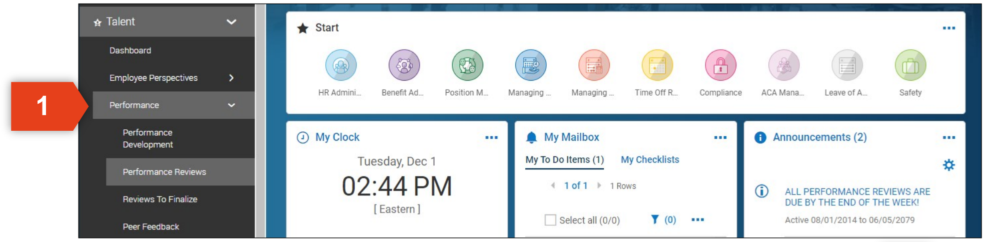


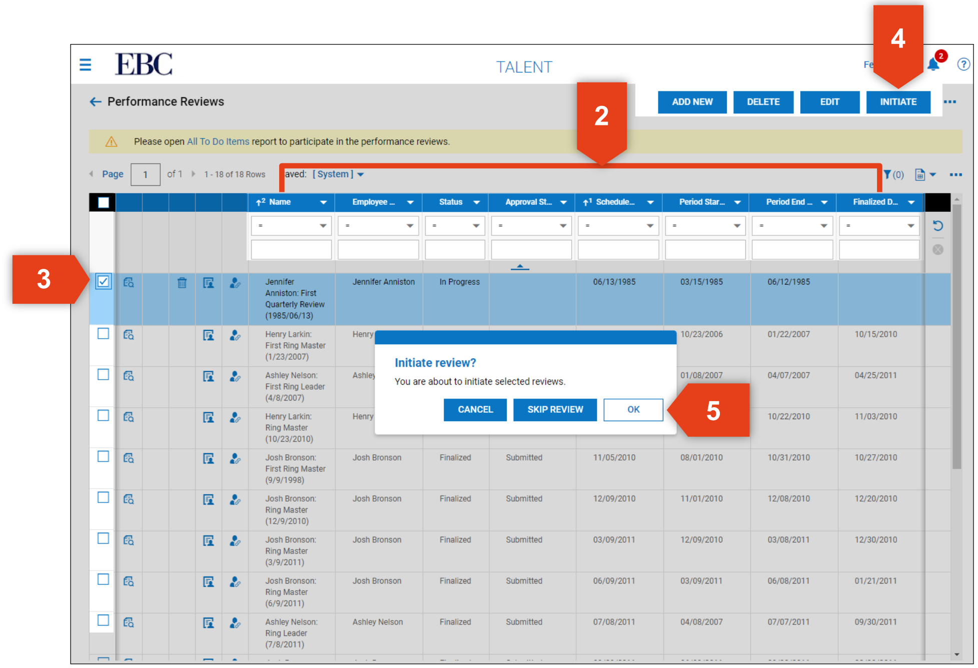


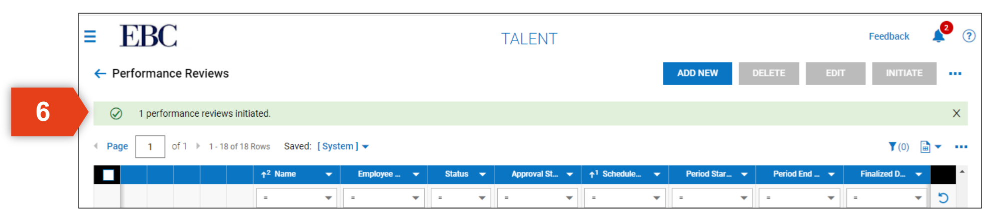
Issue a Performance Review

To issue a performance review,

1. Open the Main Menu and click Talent, Performance, then click Performance Reviews.
2. Locate the performance reviews by scrolling through the list or using the filter and search options.
3. Check the box next to one or more employee reviews that you want to issue.
4. Click INITIATE.
5. A confirmation message will display asking if you want to initiate the selected review(s) - click OK.
6. You will see a success message at the top once complete.



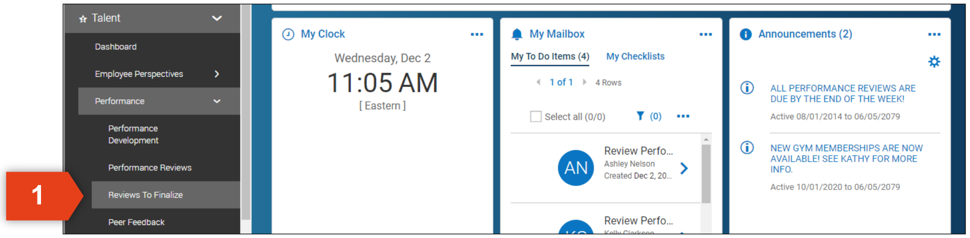


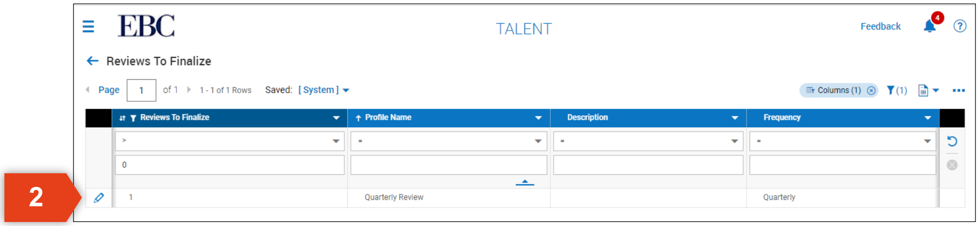


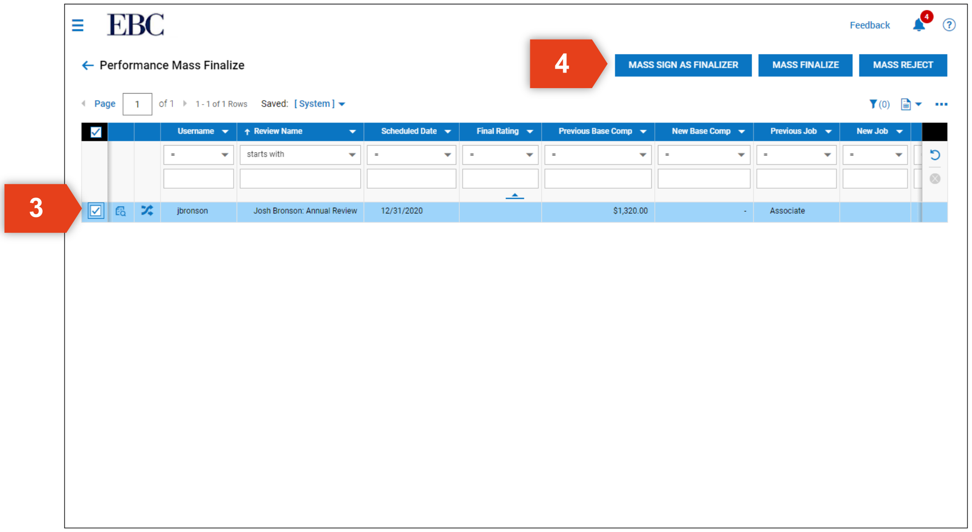
Finalize a Performance Review

To finalize a performance review,

1. Open the Main Menu, click Talent, Performance, then Reviews to Finalize.
2. If there are any reviews to finalize, they will be listed on this page. Click on the View Reviews to Finalize icon.
3. Check the box next to each employee review that you want to finalize.
4. Check a button to finalize as needed.







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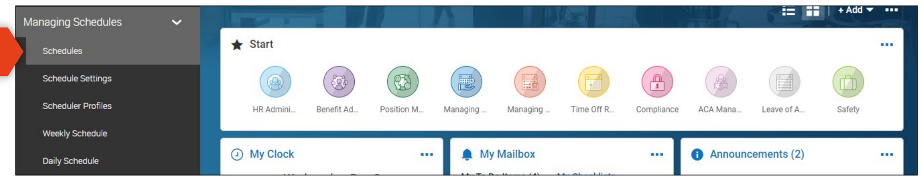
Basic Scheduling

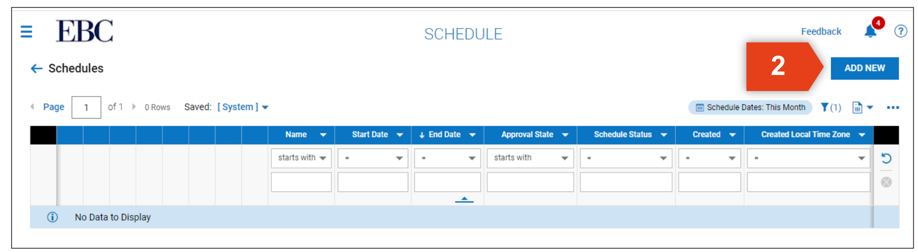
This section will review the basics of creating and maintaining a schedule.

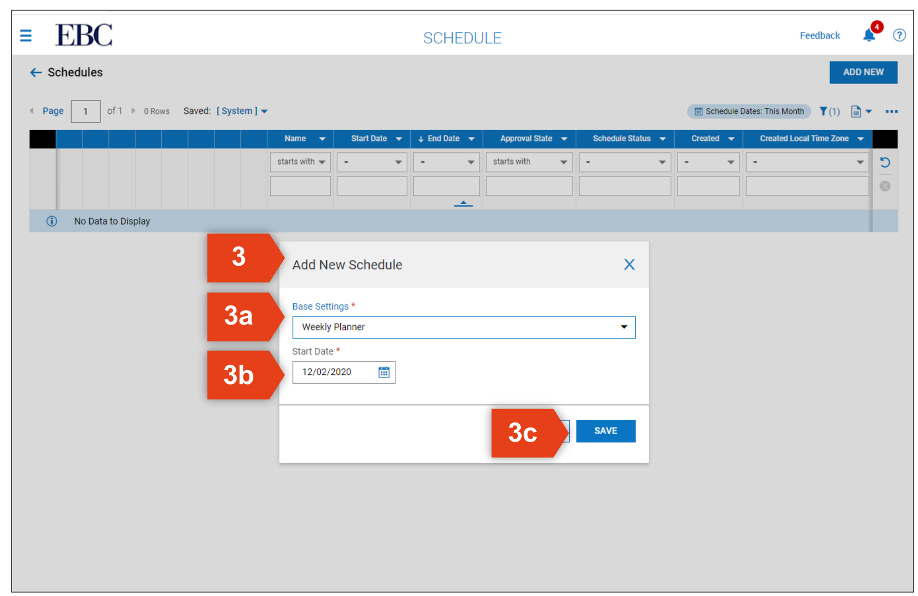
Create a Schedule

To create a schedule,

1. Open the Main Menu, click Managing Schedules, then click Schedules.
2. Click ADD NEW.
3. In the Add New Schedule window,
    a. Choose a Base Settings option,
    b. Select a Start Date,
    c. Click SAVE,

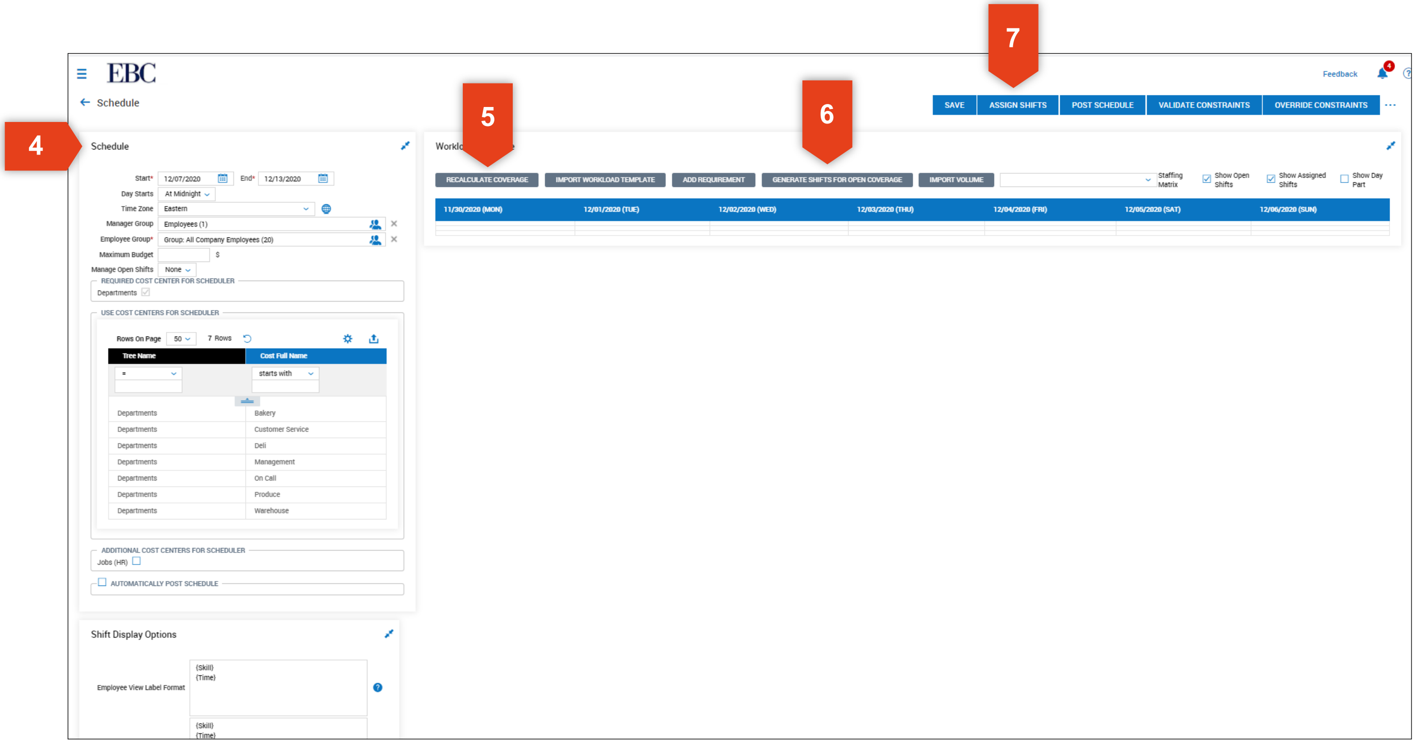






Create a Schedule

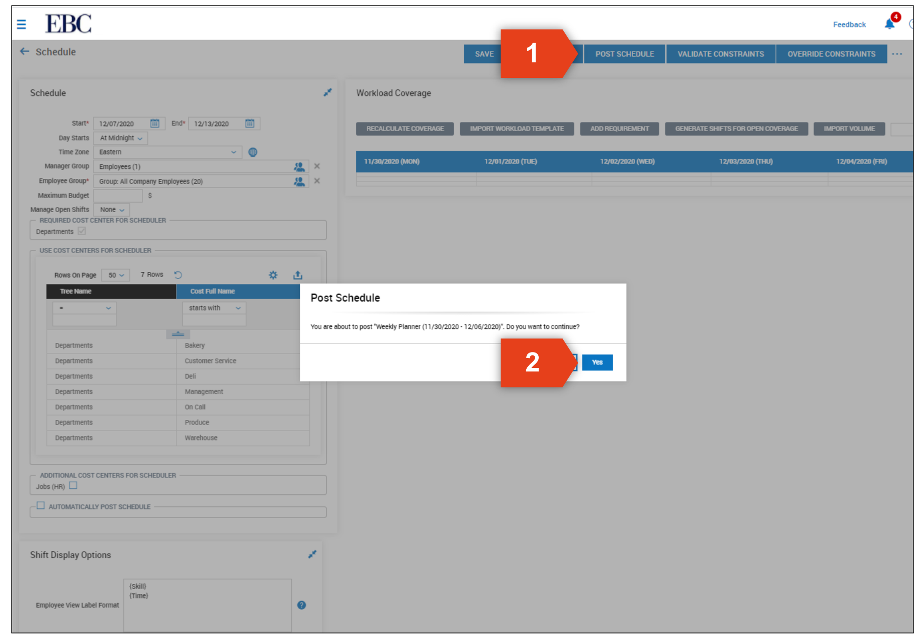
4. Select Schedule options.
5. Click RECALCULATE COVERAGE to review coverage based on you schedule options.
6. Click GENERATE SHIFTS FOR OPEN COVERAGE to view open shifts.
7. Click ASSIGN SHIFTS to allow the system to assign employees to open shifts.

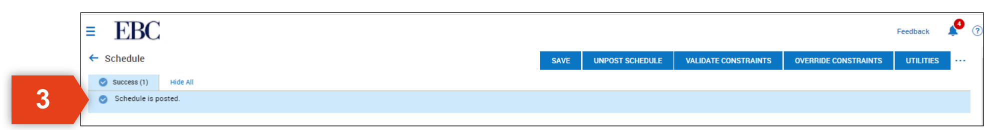


Post a Schedule

To post a schedule,

1. Click POST.
2. On the Post Schedule window, click YES to confirm.
3. A success message will appear at the top of the page.

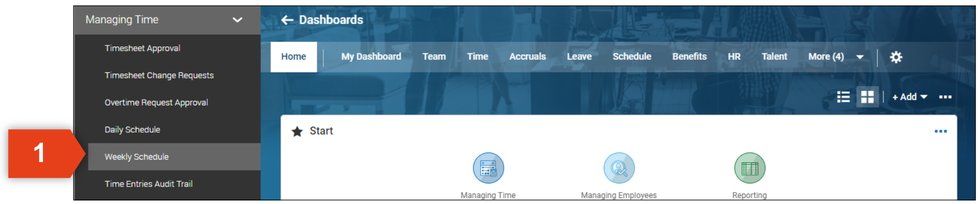


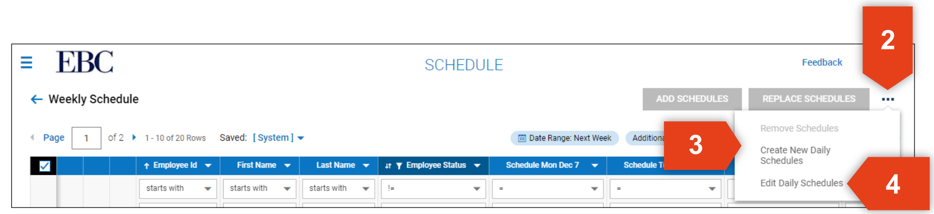


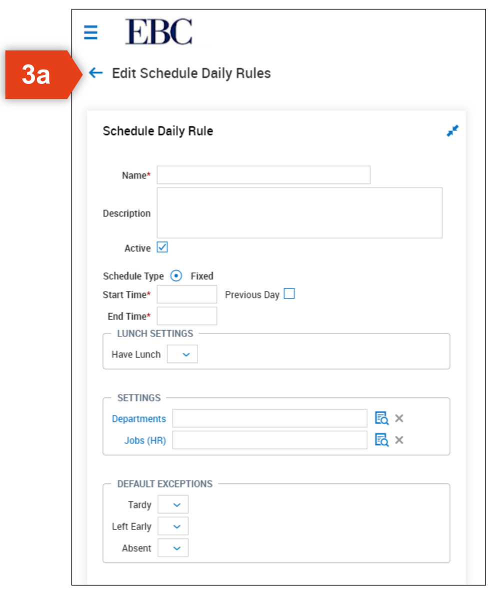
Maintain a Schedule

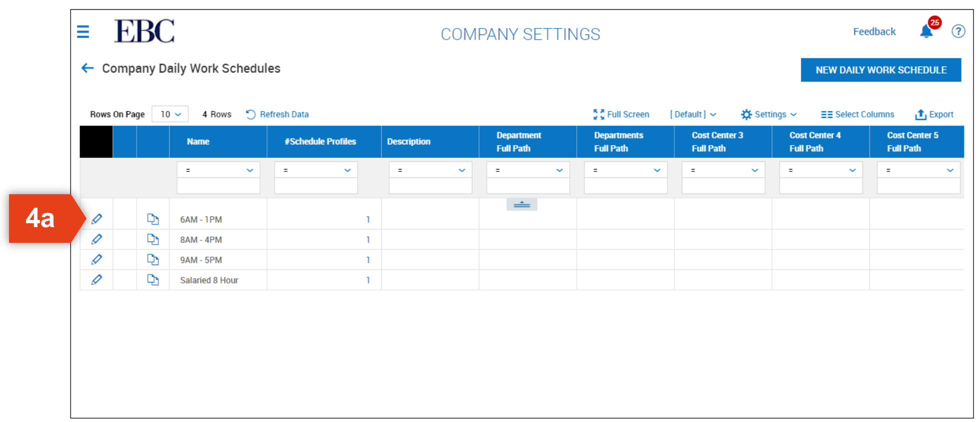
To maintain a schedule,

1. Open the Main Menu, click Managing Time, then click Weekly Schedule.
2. Click the three dots next to access edit options.
3. Click Create New Daily Schedules then,
    a. Enter the daily schedule rule details
4. Click Edit Daily Schedules then,
    a. Edit the existing schedule rules.





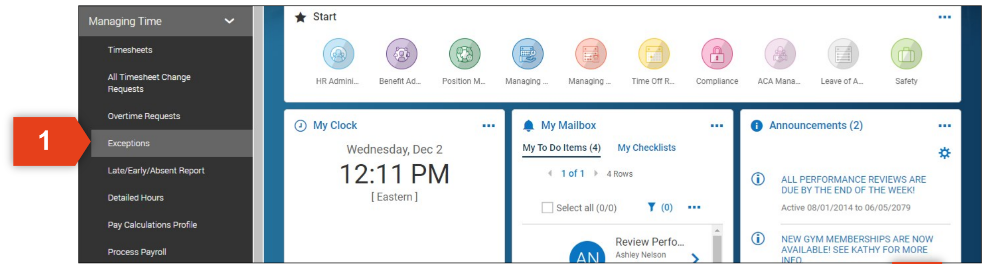


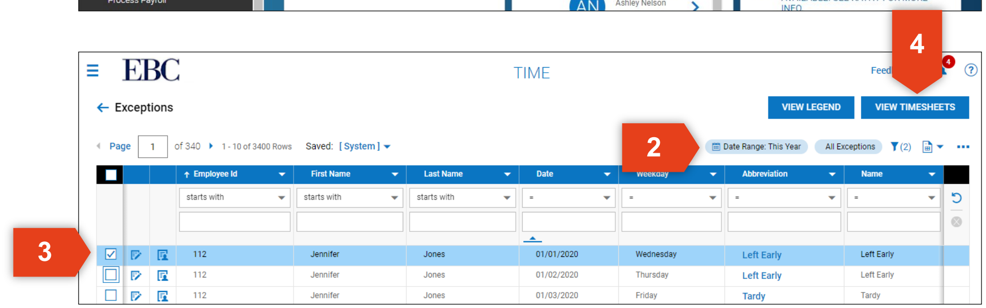


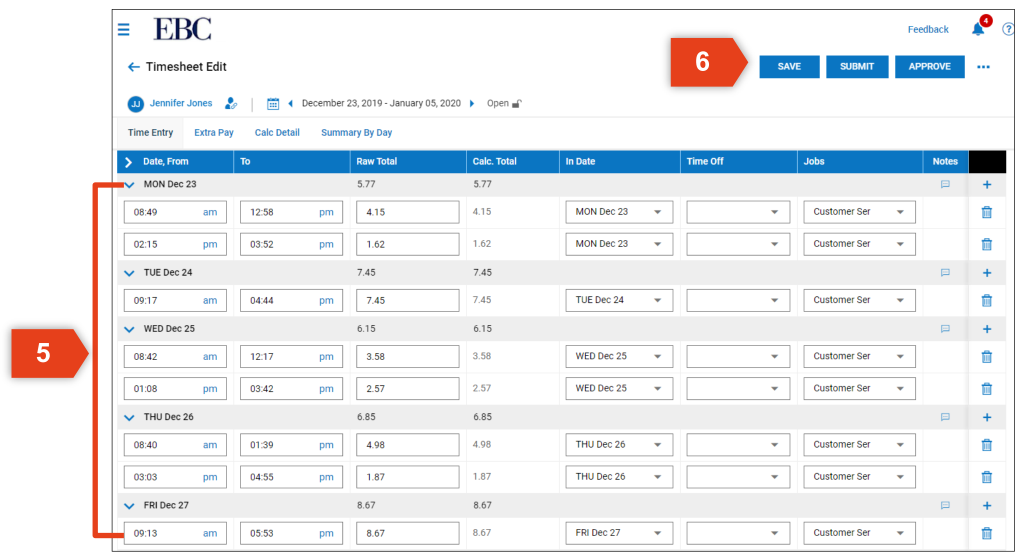
View and Manage Exceptions

To view and manage exceptions,

1. Open the Main Menu, click Managing Time, then click Exceptions.
2. Use the filter option to determine the date range and employee type for the exceptions you want to view.
3. Check the box next to one or more exceptions that you want to review.
4. Click VIEW TIMESHEETS.
5. Make edits to the time as needed.
6. Click SAVE, SUBMIT, or APPROVE.



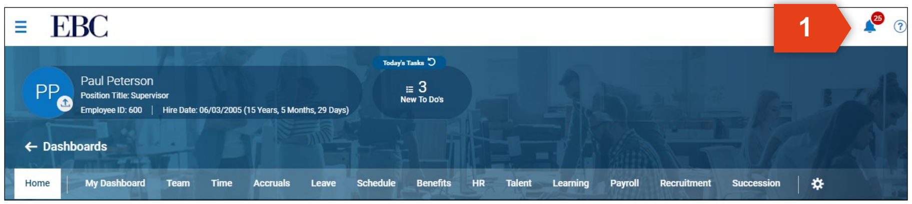


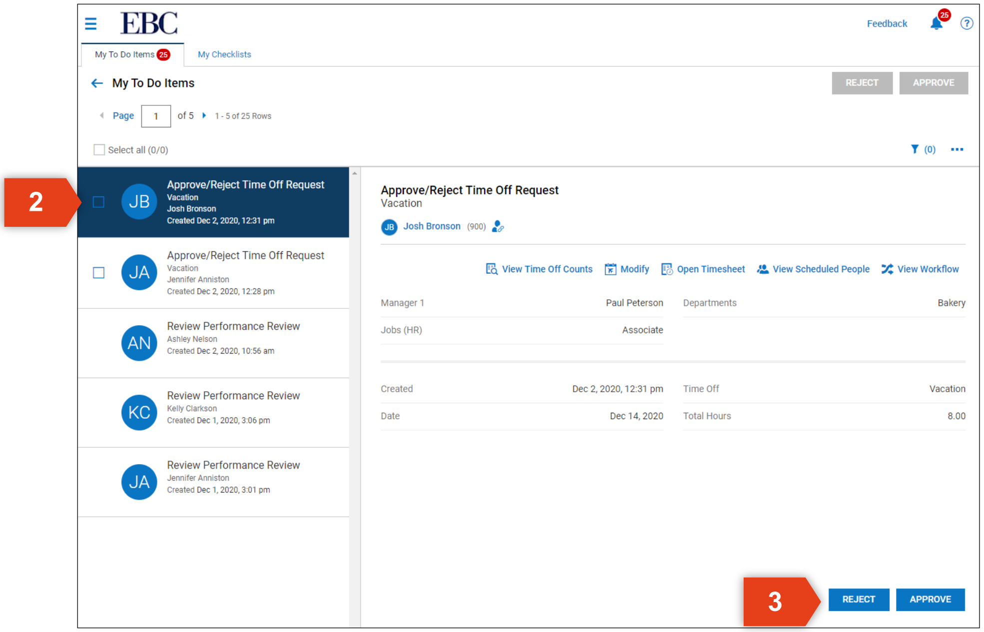


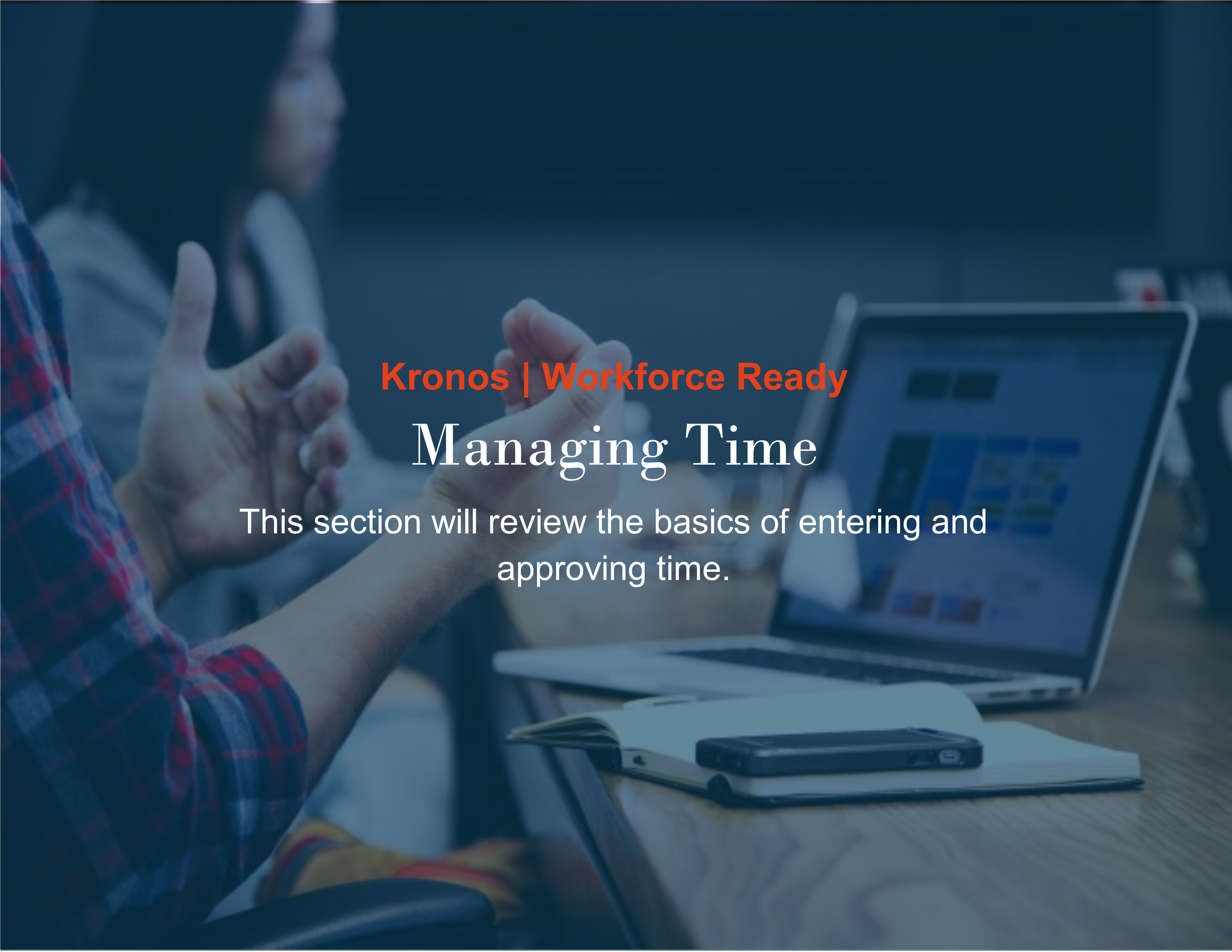
Manage Time Off Requests

To view and respond to time off requests,

1. From the Dashboard, click on the notification icon.
2. Click on the time off notification to review the re-quest.
3. Click REJECT or APPROVE.







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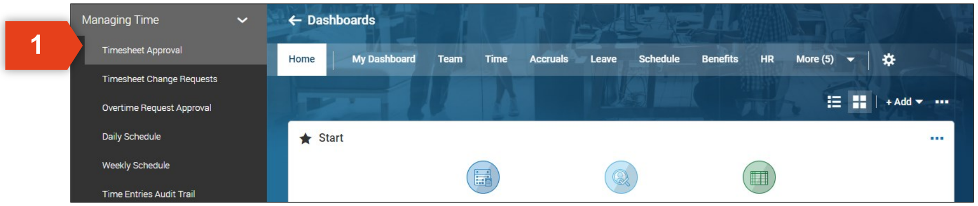
Managing Time

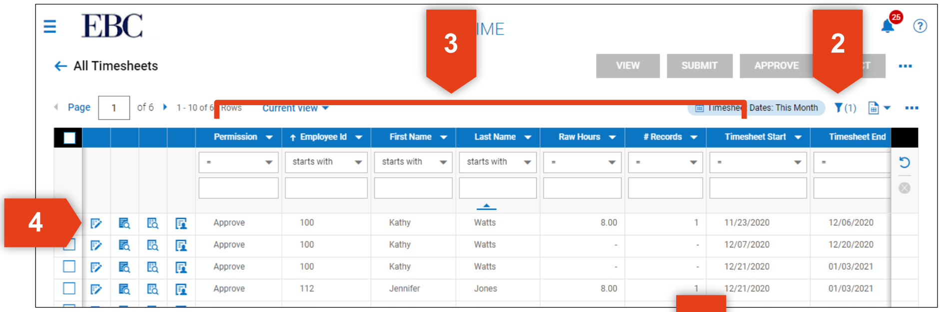
This section will review the basics of entering and approving time.

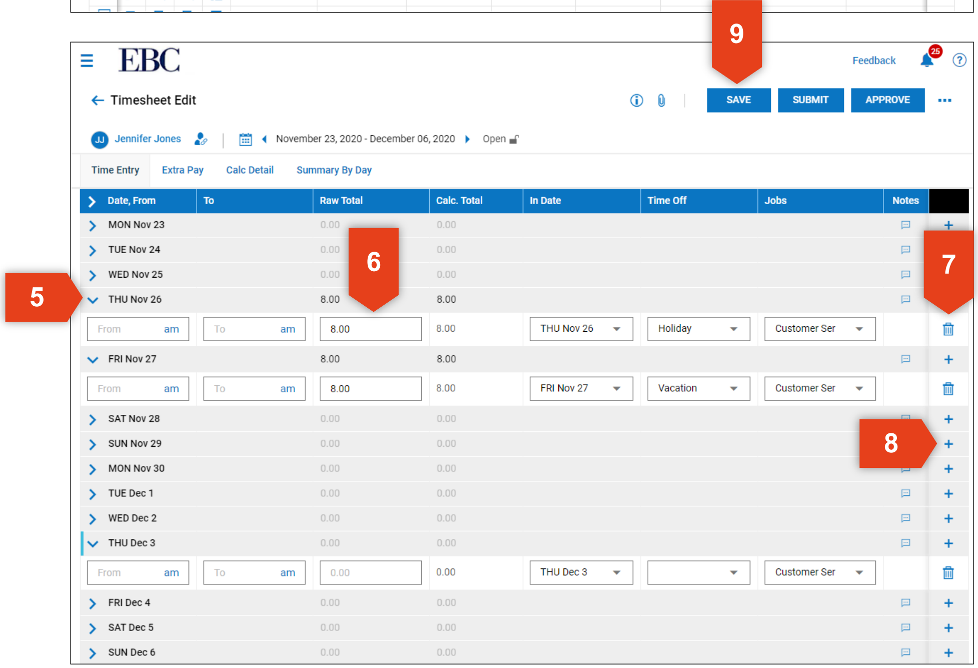
Manually Enter Time

To manually enter time for an employee,

1. Open the Main Menu, click Managing Time, then click Timesheet Approval.
2. Use the filter option to select the date range of timesheets you need to see.
3. Use the sort options to locate the employee's time-sheet.
4. Click the edit timesheet icon to view and edit.
5. Find the day that you need to edit and click the ar-row icon to expand.
6. Edit the existing times by typing into the cell.
7. Click the delete icon to remove a time entry com-pletely.
8. Click the plus sign to add a new time entry on a specific day.
9. Press SAVE when you have completed your edits/



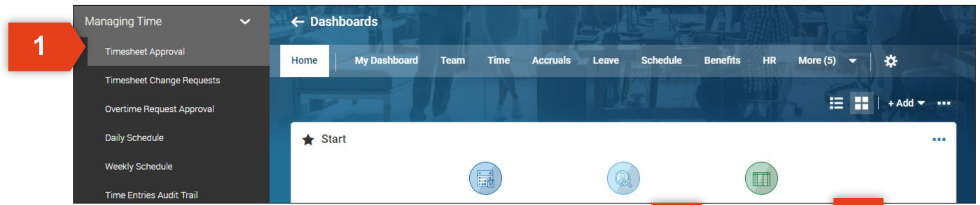


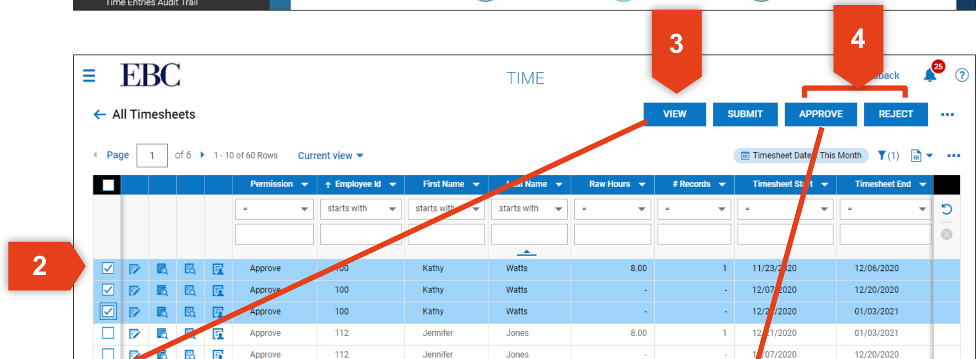


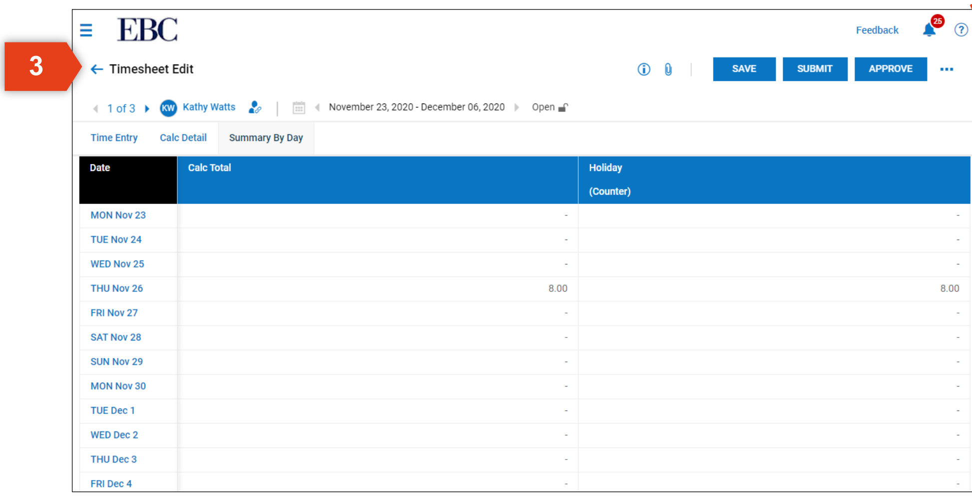
Review and Approve Time

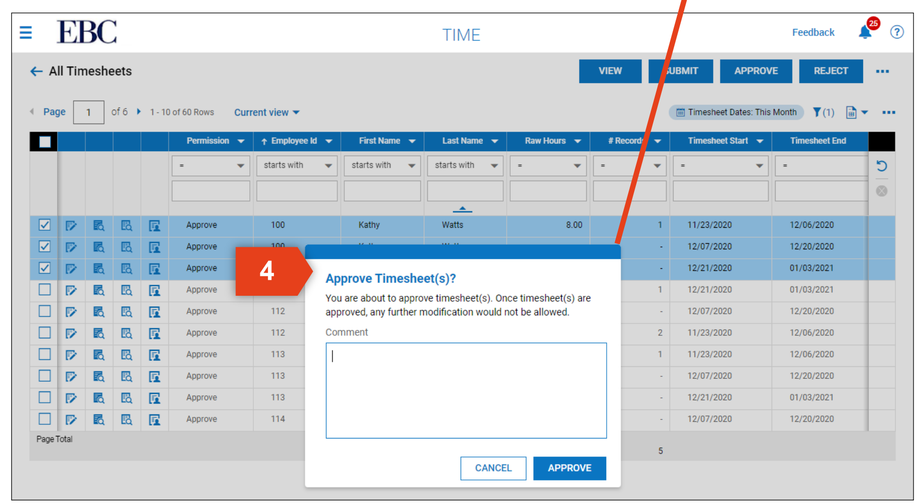
To review and approve time,

1. Open the Main Menu, click Managing Time, then click Timesheet Approval.
2. Check the box next to one or more employee time-sheets to view or respond.
3. Click VIEW to review the timesheet.
4. Click APPROVE or REJECT, then confirm the re-sponse.









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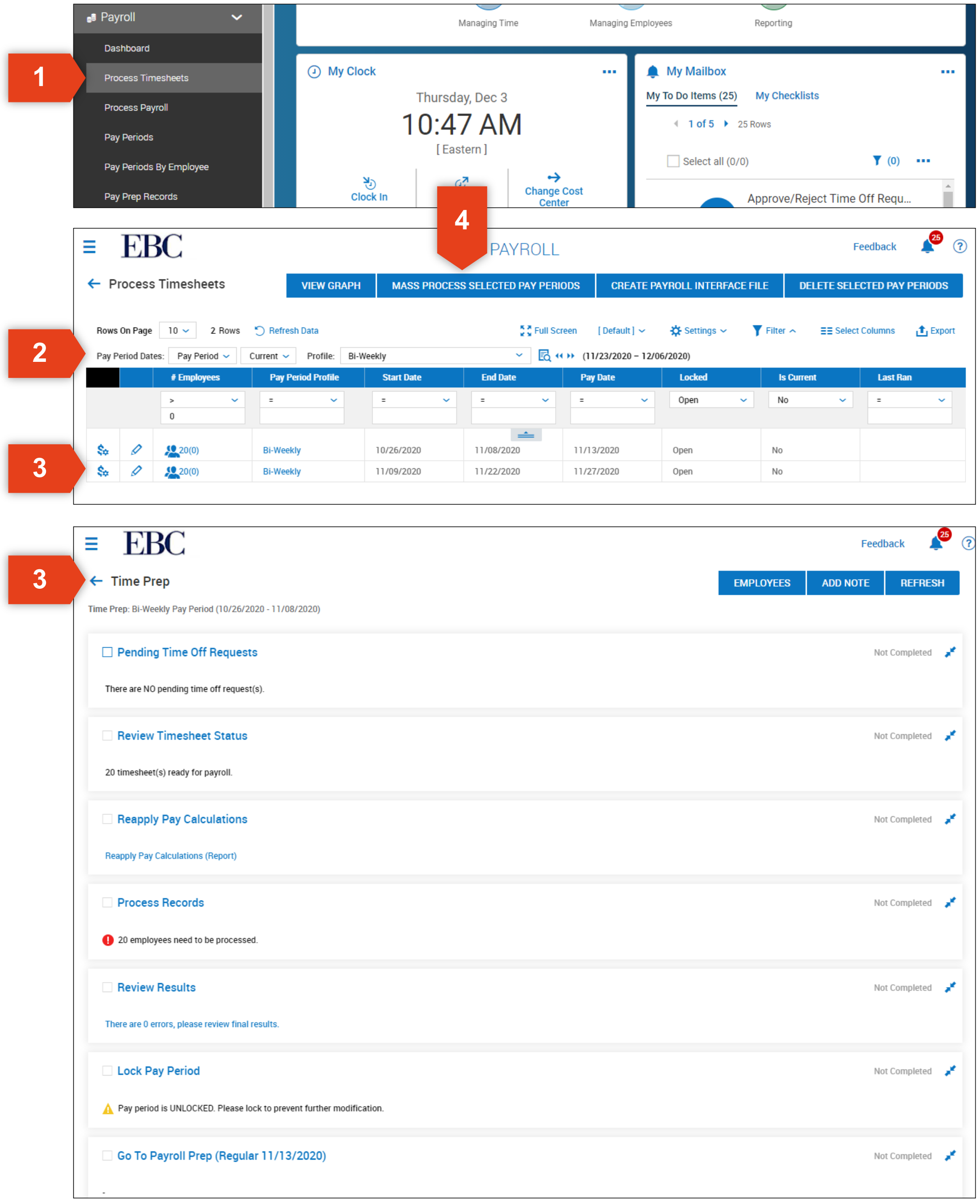
Payroll

This section will review the basics of processing payroll.

Process Timesheets

To process timesheets,

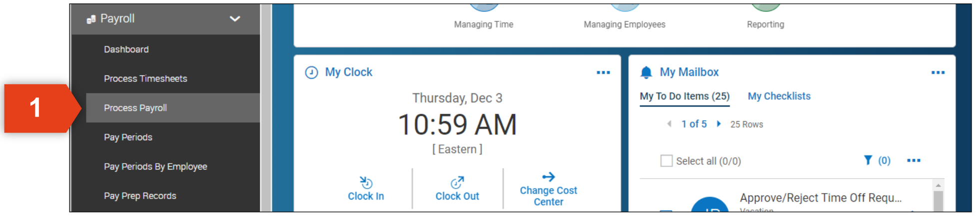
1. Open the Main Menu, click Payroll, then Process Timesheets.
2. Select the Pay Period you need to process.
3. Click the Pay Period Functions icon to review the Time Prep page for he select pay week.
4. Click MASS PROCESS SELECTED PERIODS to process the timesheets listed for that pay period.

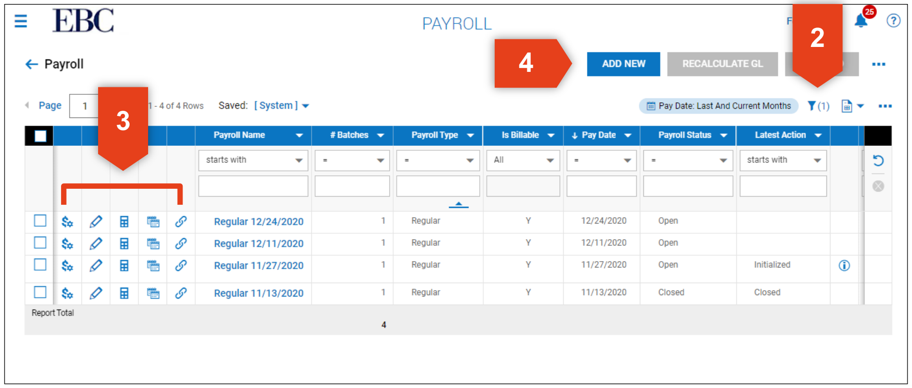


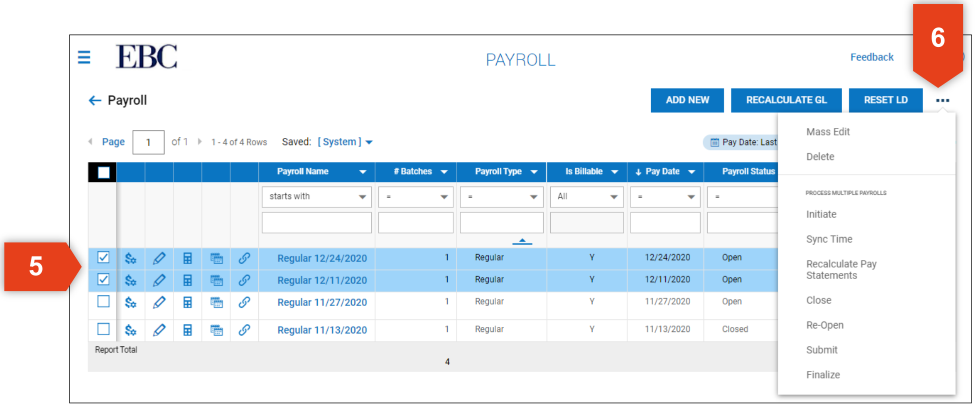
Process Payroll

To process payroll,

1. Open the Main Menu, click Payroll, then Process Payroll.
2. Use the filter option to select the date range of timesheets you need to see.
3. Use the action icons to access any of the following:
    - Payroll Prep Process
    - View/Edit Payroll
    - View/Edit Employee Statements
    - View/Edit Batches
    - Payroll Quick Links
4. Click ADD NEW to start a new payroll.
5. Check the boxes to select the payroll weeks you want to process.
6. Click the three dots at the top of the page to open processing options.







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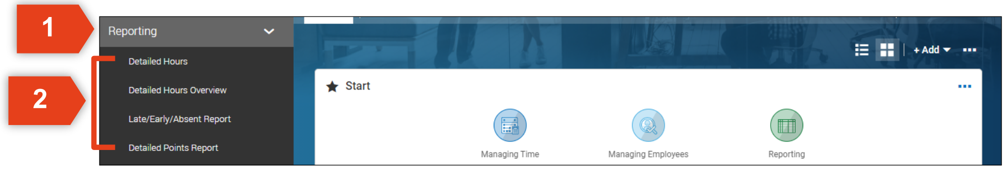
Reporting

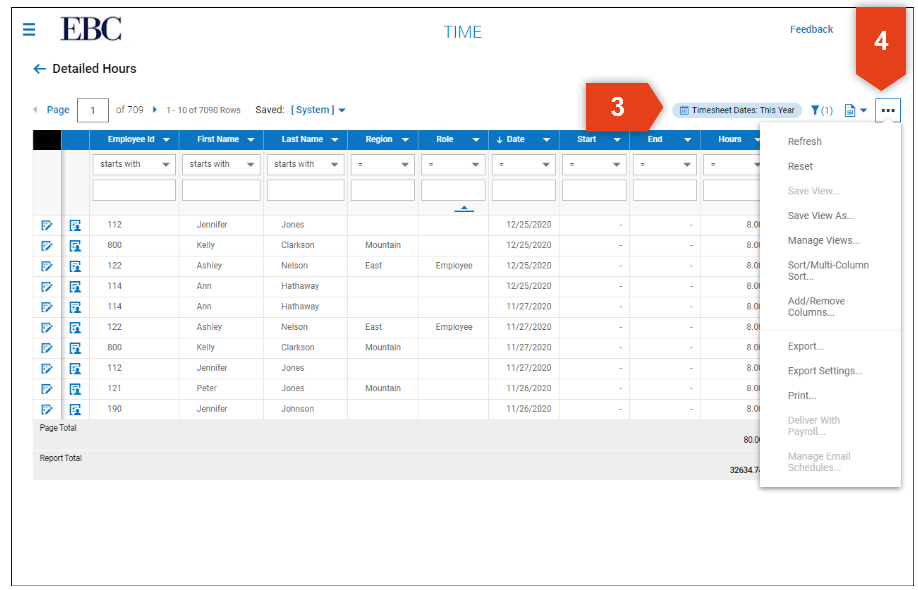
This section will review the basics of generating a report.

Review Reports

To review reports,

1. Open the Main Menu, click Reporting. This section has several defined reports you may choose from.
2. Select the report you want to run.
3. Click the filter option to choose a date range for the selected report.
4. Click the three dots at the top to open more options. From here, you can:
    - Print
    - Export
    - Save





Review Reports

Most of the categories in the Main Menu also includes a reporting option to generate and export reports specific to that category. Here is a overview of the reports within each category: