Employee Trace Tool Operating Instructions

Instruction Guide

This document is an instruction guide for the Employee Trace Tool for Workforce Central Customers.

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Introduction

The Employee Trace Tool is a free resource provided to Kronos Workforce Central customers. This tool provides a simple report which, for a given initial employee, provides a list of other employees that have worked with that employee. The report shows employees that have worked overlapping shifts with the initial employee. Determining which employees “worked with” the initial employee is determined via Labor Levels and at a level of detail provided by the user at run time, and also by the level of detail provided by the organizations configured Labor Levels.

As a free resource, support for this tool is provided through the Kronos Community website.

Version 1.0.

Disclaimer

Please consult your counsel concerning any privacy related issues in conjunction with your use and distribution of this report.

Description

The tool is initiated via a Workforce Central Interface. The tool will prompt for a single initial employee number, and date range to examine. Additionally, it will prompt for each of the 7 labor levels to include or exclude in matching overlapping employees.

The Workforce Central Interface creates a data file, in CSV format, which can be imported into Excel or a reporting tool to display the employees that have worked overlapping shifts with the initial employee.

Requirements

These instructions assume the Employee Trace Interface is already installed. (Installation instructions are available from Kronos)

The interface will write a data file to the default output location for interfaces. This is usually the WIM_OUT directory but can be different depending on your environment. In order to move the output file to a location for reporting, such as a user’s desktop, download the output file as it is produced, or use SFTP to copy the file, similar to most payroll interface files. In some cases, the WIM_OUT location can be a shared network location, which allows for a simple file copy.

In order to display the report, we currently provide two Business Intelligence Reporting Tools, each of which is publicly distributed at no cost. One of these tools is required to view the formatted reports. Also provided is an Excel template for viewing the information in Excel.

- Microsoft PowerBI
- MicroStrategy Desktop

The output is produced in simple CSV format, and is also viewable in Excel or other capable tools. However no formatted output is available, but it can be useful if there is no other option. CSV files are supported by a large number of other popular reporting tools, and you can use any of these to write your own reports if desired.

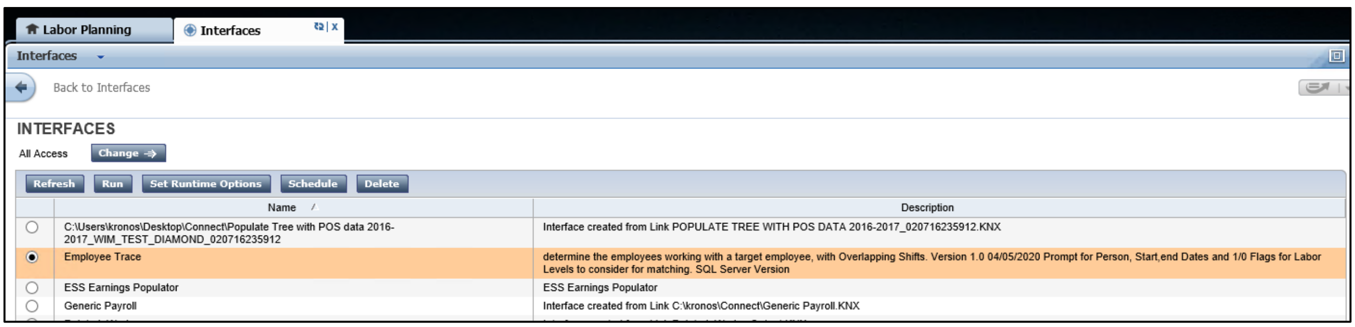
General Instructions

The process consists of two general steps. The first is to run the data extraction process, which is a Workforce Central integration step. It will prompt for several values and produced a results output file in CSV format.

The second step is to import the data file into the reporting tool of choice.

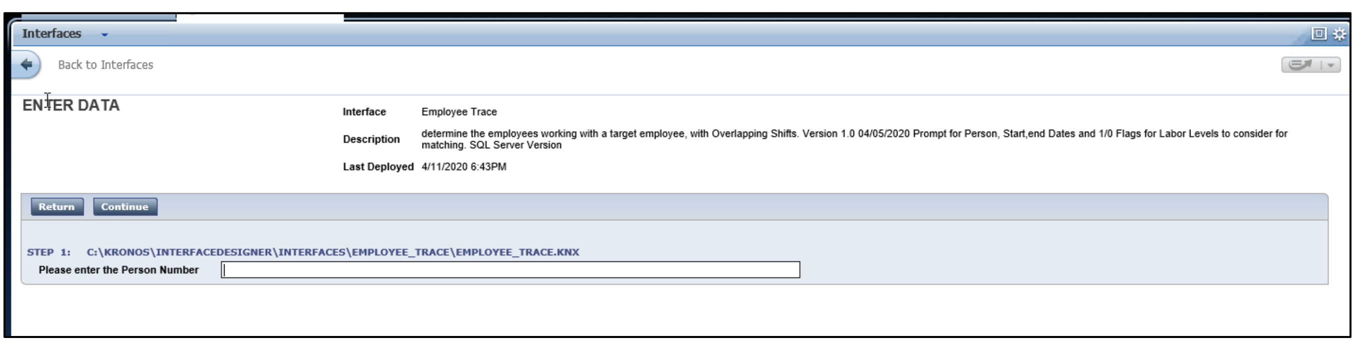
Run the Data Extract Interface

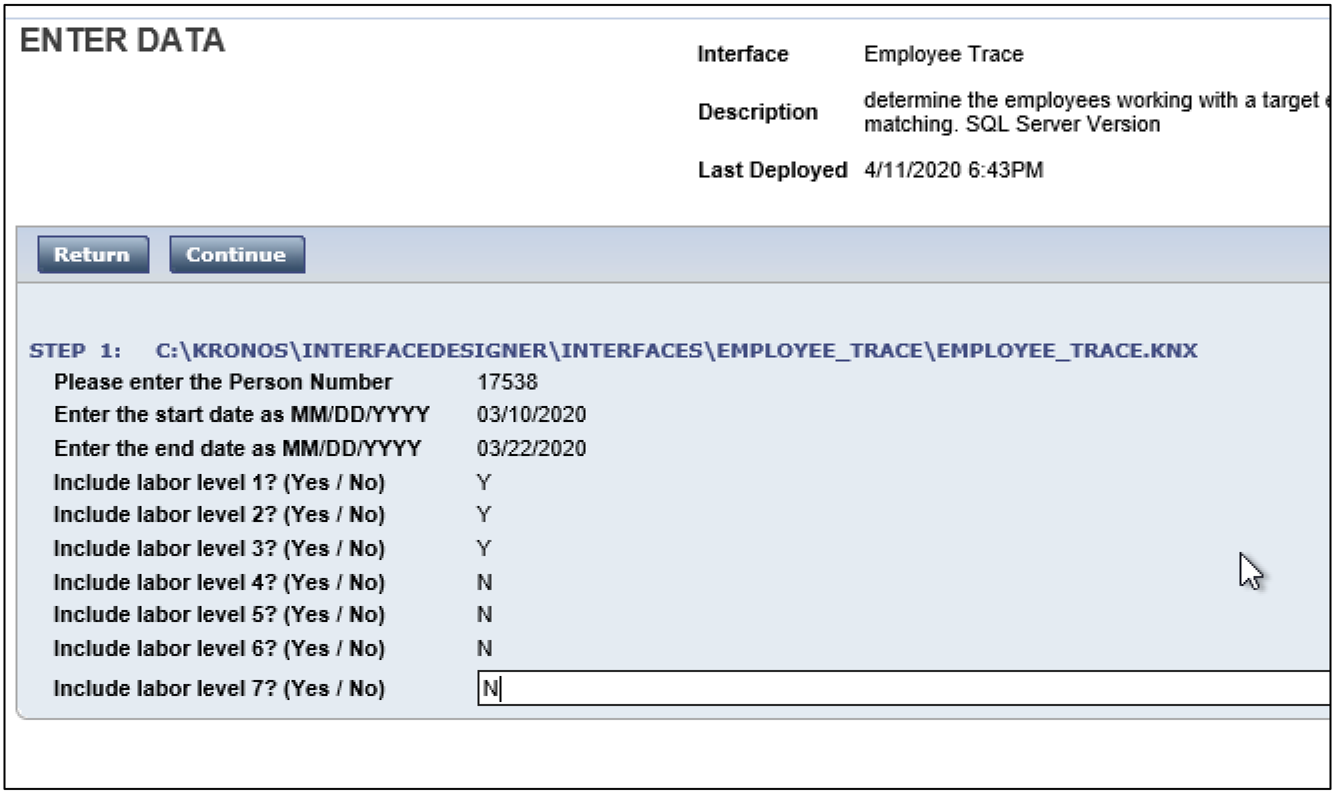
Within Workforce Central, logon as a user with the ability run the interface.



From the Interfaces tab, you should now see the new option for Employee Trace. Select the process and click Run. The interface will run for one initial person at a time, and will write to the same output file. If you wish to run more than one, be sure to copy or move the file, or complete reporting needs for the first person, before running the extract for the next person.

The interface first prompts for the employee number of the initial employee. Enter the employee number and click Continue. Repeat for the remaining fields, as shown below.





Data Entries

1. Person Number: Enter the employee (person) number of the Initial Person. Employee number is used as there can be several employees with similar names.

2. Start Date: The starting date of the period to examine. Time punches entered on or after this date will be examined. Enter the date information in MM/DD/YYYY format. For example 03/07/2020 for March 7th, 2020.

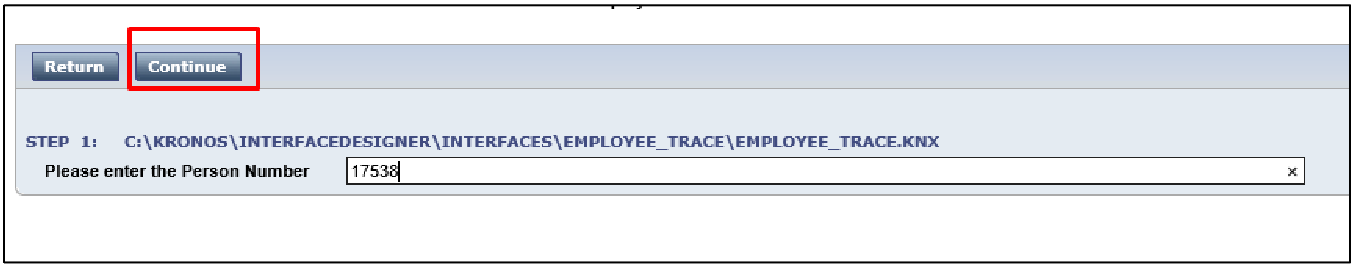
3. End Date: The Ending date of the period to examine. Time punches entered on or prior to this date will be examined. Enter the date information in MM Enter the date information in MM/DD/YYYY format. For example 03/07/2020 for March 7th, 2020.

4. – 10. For the next seven entries enter Yes or No. This entry can be shortened to Y or N. This indicates, for each of the 7 labor levels, if the Labor Level must match in order for an employee to be considered to "work with" the primary employee.

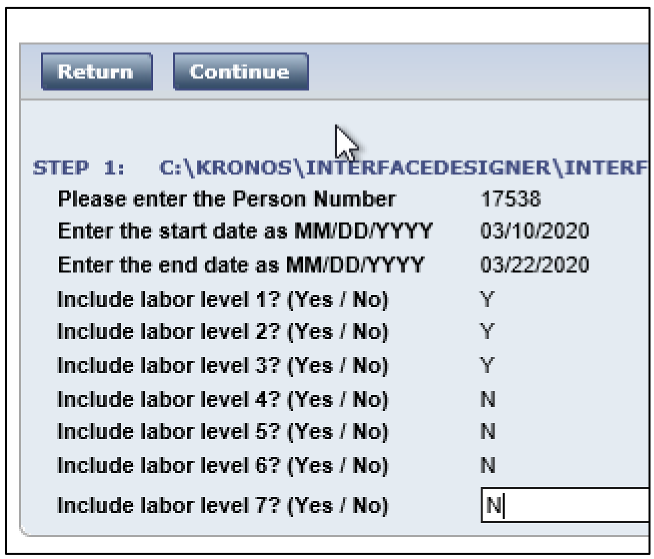
As example, assume the Labor Levels are (1) District, (2) Region, (3) Store, (4) Department, (5) Job Role and 6 and 7 are unused. In order to say employees worked with each other, they would have to work at the same time at the same District, Region, and Store. Since employees can interact with employees in other departments and job Roles, we do not want to require matching on department nor Job roles. And unused levels are not required to match.

So in this case the matching is required (YES) on Labor Levels 1, 2, and 3, and not matched (NO) on Labor Levels 4 through 7.

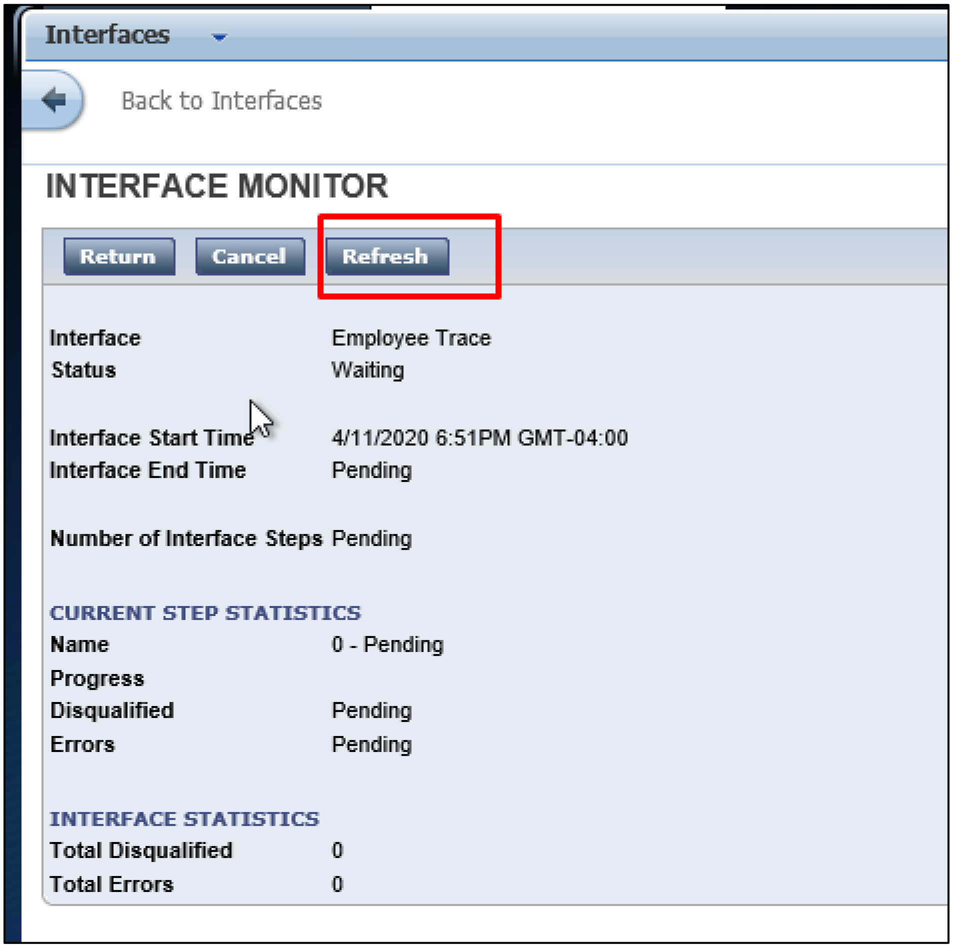
This is an example, and your Labor Levels are likely different. Any combination of Labor Levels is possible. After each entry, click on Continue. See the example below.



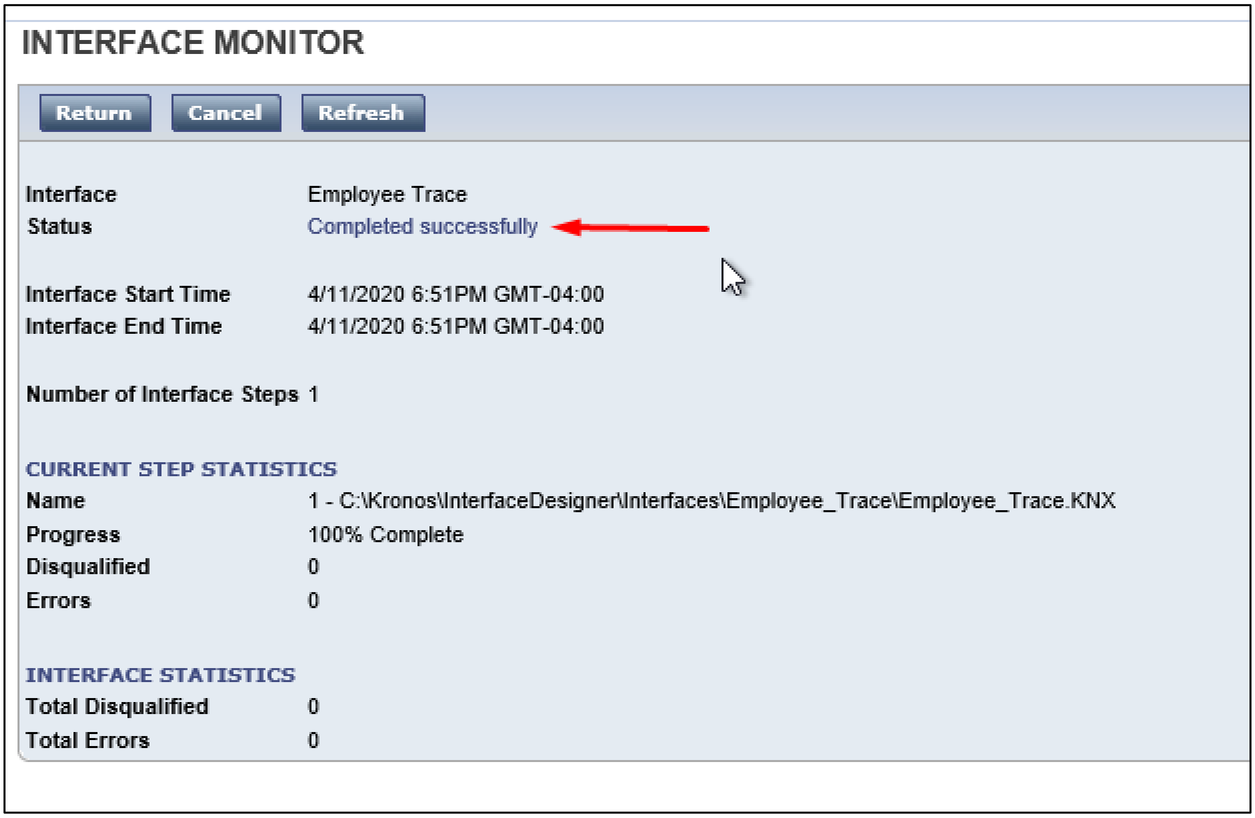
This picture shows a completed form, with matching required on Labor Levels 1 through 3 only.



When the interface runs, a page like this displays. The process usually runs quickly. Click Refresh to refresh the display.



When the process is completed, The message Completed successfully should display. Click on Completed successfully to see the results.



You should then see a window, which looks partially like this. Notice the name of the newly created data file (Employee_Trace.csv). Click on the name (Employee_Trace.csv) to download the file. The file will be copied to either your default download location, or prompt you for a location, depending on your browser settings. Note where the file is downloaded. This is the easiest, but not only, method to retrieve the file.

Note that in some cases, it may be possible to retrieve the file using SFTP to copy the file, similar to most payroll interface files. Also, in other cases, the output location (usually WIM_OUT) can be a shared network location, which allows for a simple file copy.

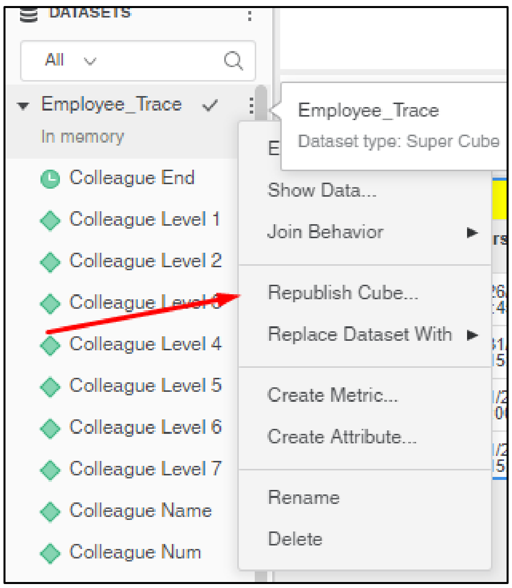
MicroStrategy Desktop

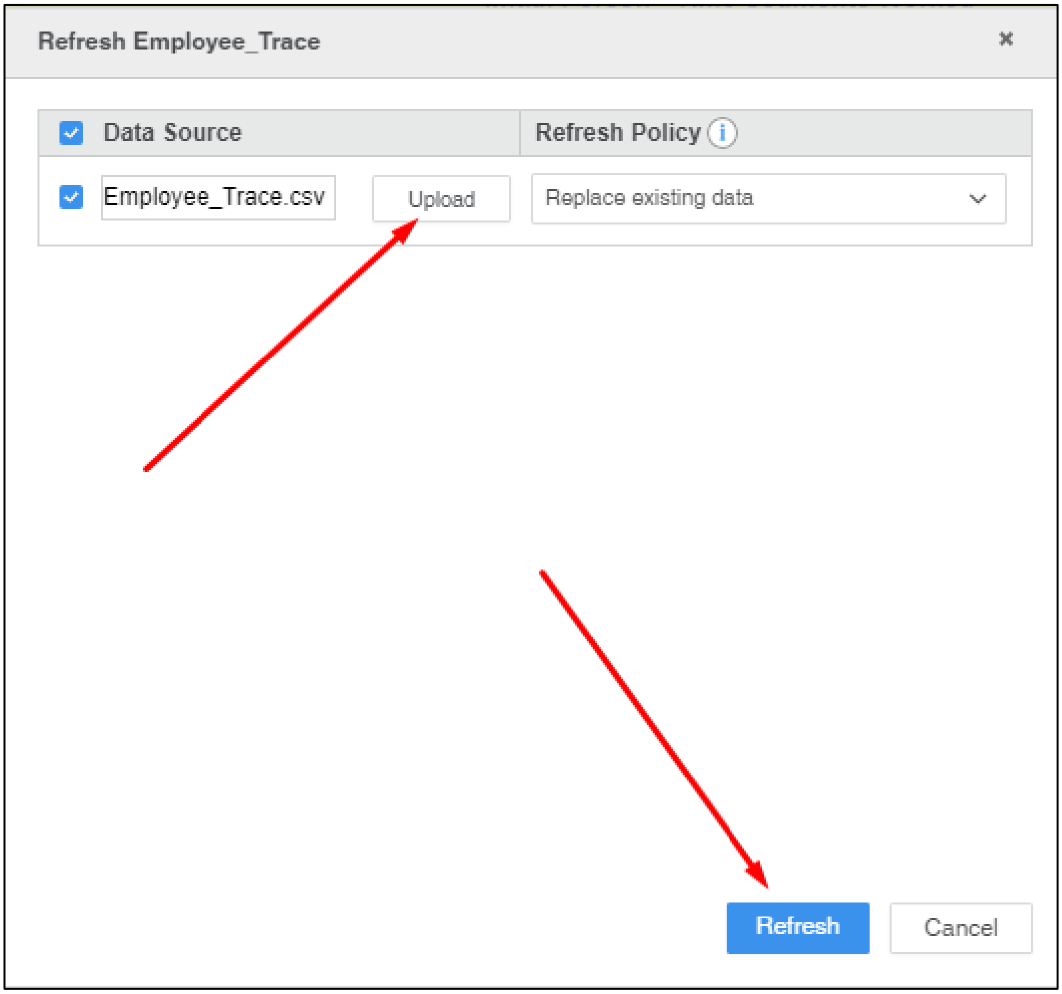
Refreshing the information reported

For each initial person to review, it is necessary to refresh the data shown with the data file created from the latest extract.

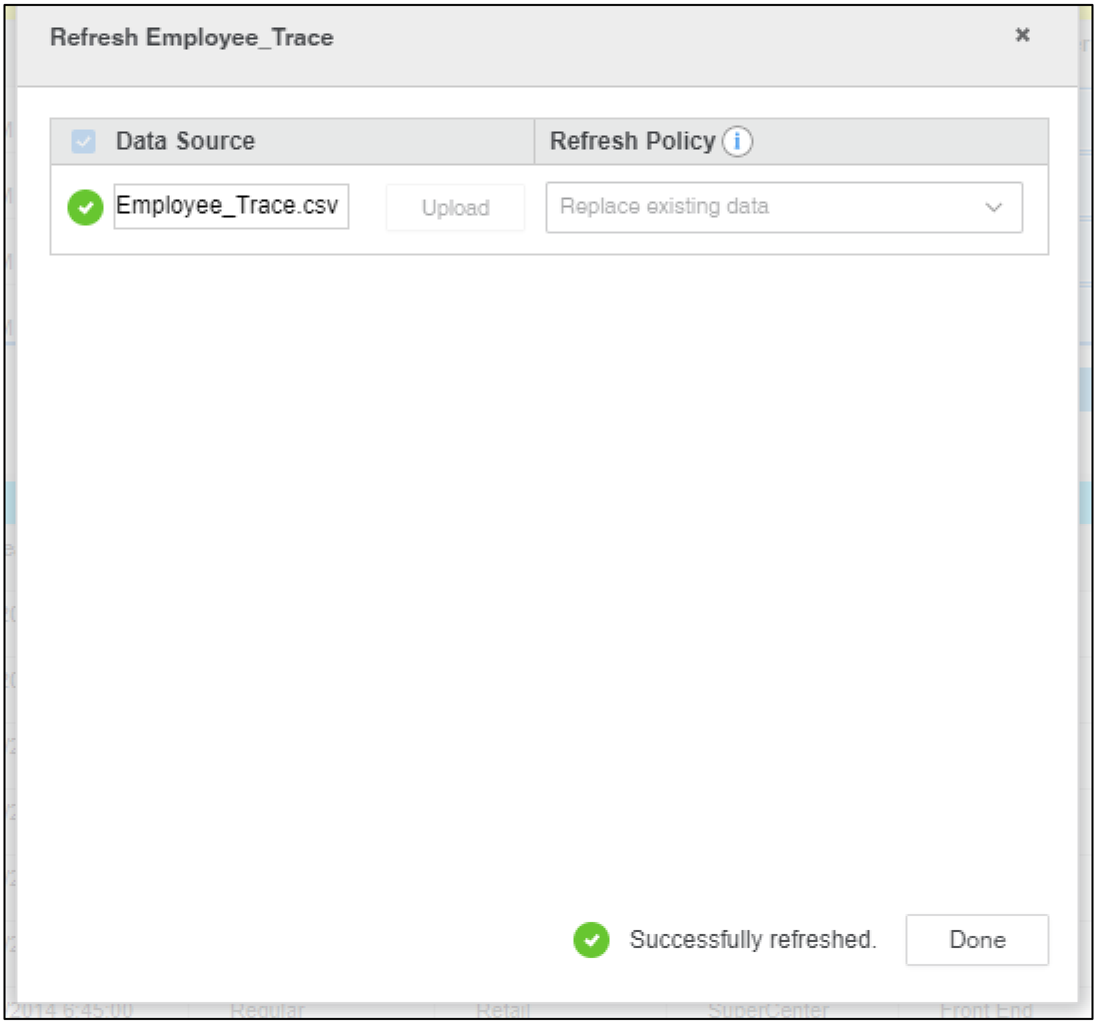
Open the report in MicroStrategy desktop. Refresh the report, by importing the newly created data.

In the Datasets tab, right click on the query "Employee Trace" and in the pop-up menu select Republish Cube.





The first time this step is run, you will likely need to locate the new csv file location. Save the report with the new location.



Identify the new csv file, select “Finish”. The report will refresh.

Viewing the Report

Employee Trace Tool

KRONOS

Person Paycodes to Include: (All) | Regular

Initial Person - Time Segments Worked										
Person Num	Person Start	Person End	Person Paycode	Person Level 1	Person Level 2	Person Level 3	Person Level 4	Person Level 5	Person Level 6	Person Level 7
17538	1/26/2014 10:45:00 AM	1/26/2014 1:45:00 PM	Regular	Retail	SuperCenter	Front End	-	Cashier		
	1/31/2014 5:15:00 PM	1/31/2014 8:15:00 PM	Regular	Retail	SuperCenter	Front End	-	Cashier		
	2/1/2014 11:00:00 AM	2/1/2014 1:15:00 PM	Regular	Retail	SuperCenter	Front End	-	Cashier		
	2/1/2014 1:15:00 PM	2/1/2014 3:00:00 PM	Regular	Retail	SuperCenter	Front End	-	Cashier		

Colleague Paycodes to Include: (All) | Regular

Colleagues - Time Segments Worked										
Colleague Name	Colleague Start	Colleague End	Colleague Paycode	Colleague Level 1	Colleague Level 2	Colleague Level 3	Colleague Level 4	Colleague Level 5	Colleague Level 6	Colleague Level 7
Gavin, Martha	2/1/2014 10:00:00 AM	2/1/2014 11:00:00 AM	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		
	2/1/2014 11:30:00 AM	2/1/2014 5:00:00 PM	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		
Kamensky, Annie	1/26/2014 11:15:00 AM	1/26/2014 1:30:00 PM	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		
	1/26/2014 1:30:00 PM	1/26/2014 3:15:00 PM	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		
Long, Vanessa	1/26/2014 10:00:00 AM	1/26/2014 12:30:00 PM	Regular	Retail	SuperCenter	Front End	402-Baggers	Bagger		
	1/26/2014 12:30:00 PM	1/26/2014 2:15:00 PM	Regular	Retail	SuperCenter	Front End	402-Baggers	Bagger		
	1/31/2014 5:00:00 PM	1/31/2014 6:45:00 PM	Regular	Retail	SuperCenter	Front End	402-Baggers	Bagger		
	1/31/2014 7:15:00 PM	1/31/2014 7:45:00 PM	Regular	Retail	SuperCenter	Front End	402-Baggers	Bagger		
McKenna,	1/26/2014 12:30:00	1/26/2014 3:15:00	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		

Labor Levels Matched and Ignored						
Matching on Labor Level 1	Matching on Labor Level 2	Matching on Labor Level 3	Labor Level 4 Ignored for Matching	Labor Level 5 Ignored for Matching	Labor Level 6 Ignored for Matching	Labor Level 7 Ignored for Matching

This shows the layout of the report. The shifts of the initial person within the designated timeframe are shown in the top frame, along with the related labor levels It also shows the pay codes of the initial person. The shifts of Colleagues are shown in the lower frame, showing similar information for the colleagues. It shows the shifts of the colleagues which overlap those of the initial person.

1. Clicking on a row in the top frame will filter the lower frame by the specific shift. The lower frame will then show only the colleague shifts which overlap the selected shift.

2. You can exclude (filter) certain paycodes of the initial person if they should not be included in the view. For example, an employee may have clocked in with an absence (excused or unexcused) or time off.

3. You can also exclude (filter) certain paycodes of the colleagues if they should not be included in the view. For example, an employee may have clocked in with an absence (excused or unexcused) or time off.

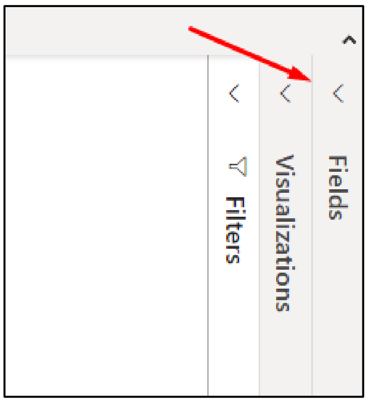
4. The bottom of the report shows the Labor Levels included or excluded for matching colleagues with the initial employee. For example, a Labor Level indicating physical building would be included, while a Labor Level which indicates a job level could be excluded. The report would then identify colleagues who worked in the same building as the initial employee, but the job level would not be considered for matching overlapping shifts.

Power BI

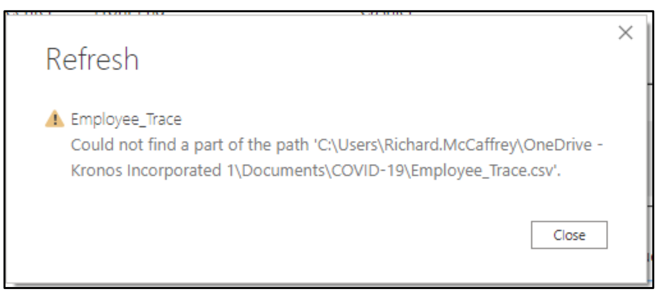
Refreshing the information reported

For each initial person to review, it is necessary to refresh the data shown with the data file created from the latest extract.

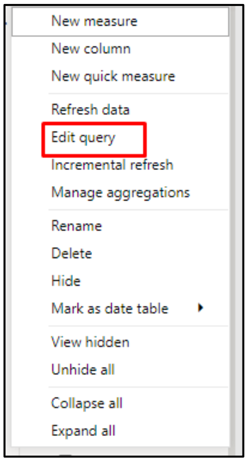
Within PowerBI expand the Fields Slider.

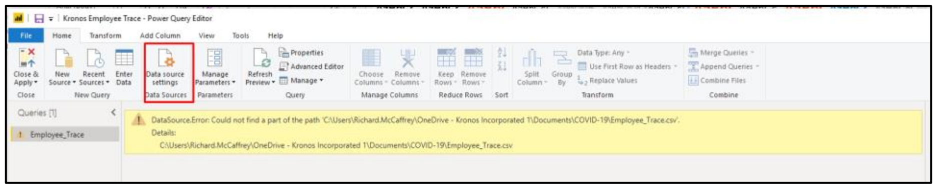


The first time you refresh the query, and every time you change the file location, you will have to repoint the data file location to your system. Make note of the location of the data (CSV) file which is generated from the Kronos system interface (shown above). The edit the query to point to the correct file location for your environment, as shown. This shows the error message.

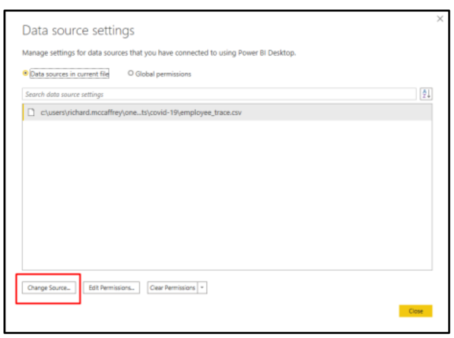


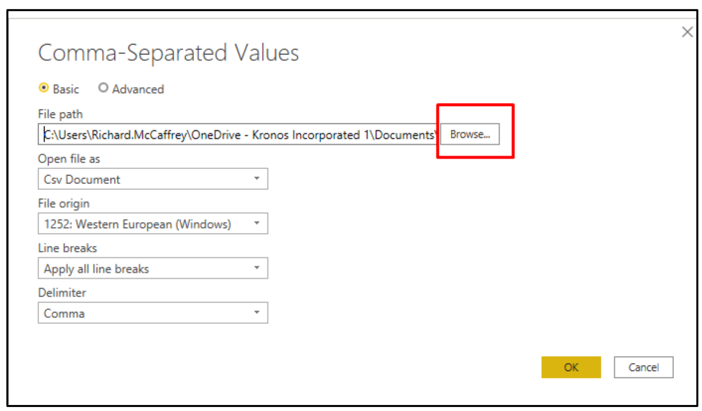
To correct the location, from the pop-up menu, select Edit. In the new window, select the button saying Data Source Settings.

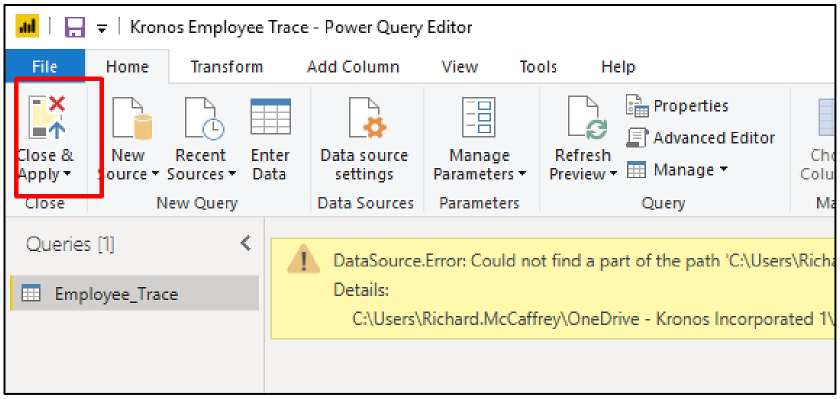




In the Data Source Settings window (below) click the button Change Source. In the next window select Browse to find the location of the new data file, as noted above. Click OK to close all related windows. Finally, click the button in the menu bar Close and Apply as shown below.





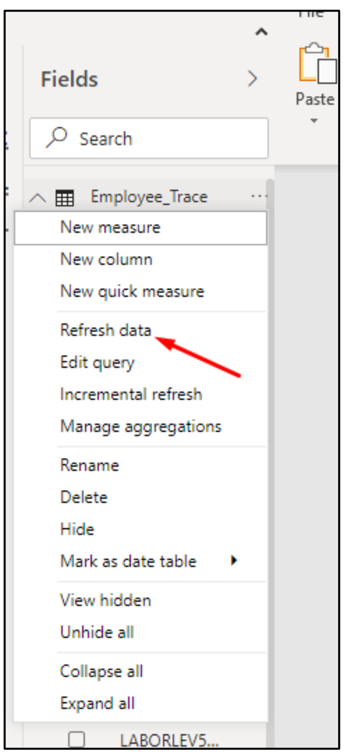


Refreshing the Data with a New Extract

For each initial person to review, it is necessary to refresh the data shown with the data file created from the latest extract. If the location of the data file has not changed since the last refresh, this is a simple process.

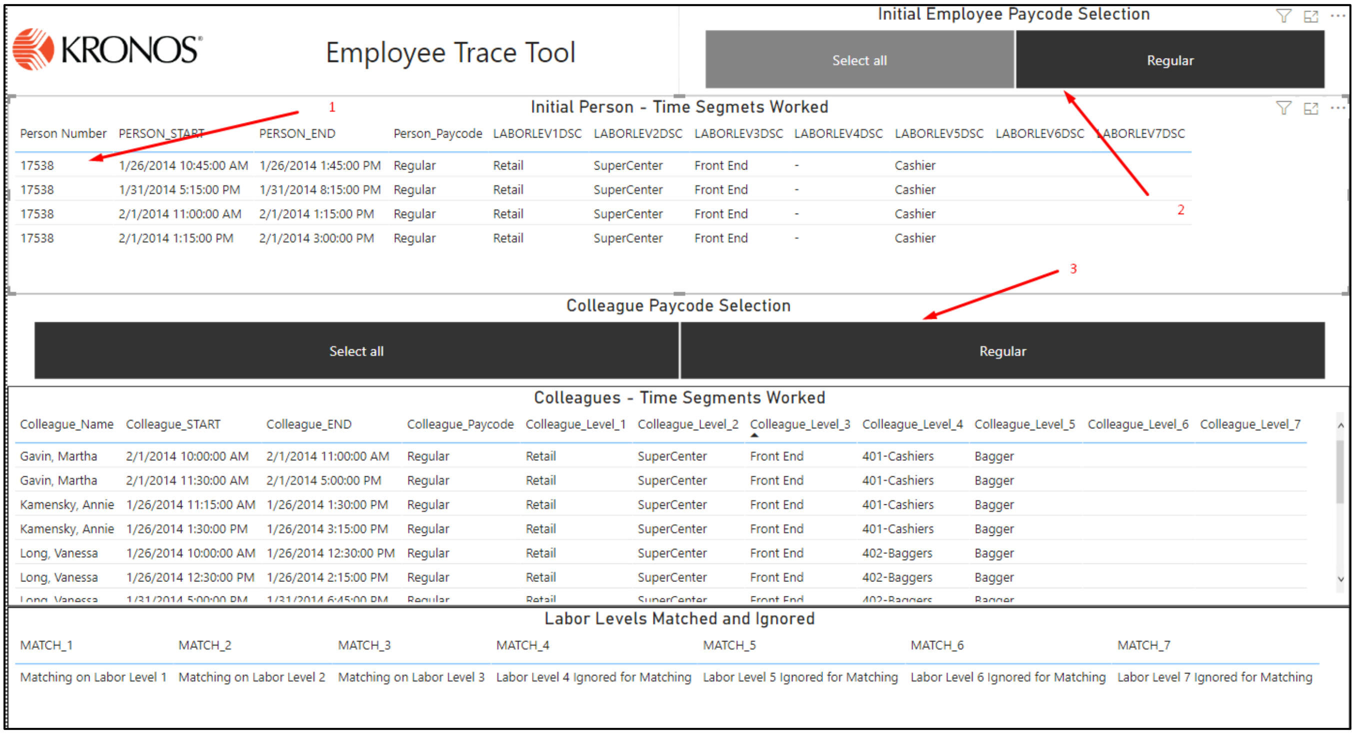
Within PowerBI expand the Fields Slider.

Click the ellipses to the right of the query name Employee Trace This will pop-up a menu. Select Refresh Query. The most recent data will display.



The refreshed data will display.

Viewing the Report



Initial Person - Time Segmets Worked

Person Number	PERSON_START	PERSON_END	Person_Paycode	LABORLEV1DSC	LABORLEV2DSC	LABORLEV3DSC	LABORLEV4DSC	LABORLEV5DSC	LABORLEV6DSC	LABORLEV7DSC
17538	1/26/2014 10:45:00 AM	1/26/2014 1:45:00 PM	Regular	Retail	SuperCenter	Front End	-	Cashier		
17538	1/31/2014 5:15:00 PM	1/31/2014 8:15:00 PM	Regular	Retail	SuperCenter	Front End	-	Cashier		
17538	2/1/2014 11:00:00 AM	2/1/2014 1:15:00 PM	Regular	Retail	SuperCenter	Front End	-	Cashier		
17538	2/1/2014 1:15:00 PM	2/1/2014 3:00:00 PM	Regular	Retail	SuperCenter	Front End	-	Cashier		

Colleagues - Time Segments Worked

Colleague_Name	Colleague_START	Colleague_END	Colleague_Paycode	Colleague_Level_1	Colleague_Level_2	Colleague_Level_3	Colleague_Level_4	Colleague_Level_5	Colleague_Level_6	Colleague_Level_7
Gavin, Martha	2/1/2014 10:00:00 AM	2/1/2014 11:00:00 AM	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		
Gavin, Martha	2/1/2014 11:30:00 AM	2/1/2014 5:00:00 PM	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		
Kamensky, Annie	1/26/2014 11:15:00 AM	1/26/2014 1:30:00 PM	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		
Kamensky, Annie	1/26/2014 1:30:00 PM	1/26/2014 3:15:00 PM	Regular	Retail	SuperCenter	Front End	401-Cashiers	Bagger		
Long, Vanessa	1/26/2014 10:00:00 AM	1/26/2014 12:30:00 PM	Regular	Retail	SuperCenter	Front End	402-Baggers	Bagger		
Long, Vanessa	1/26/2014 12:30:00 PM	1/26/2014 2:15:00 PM	Regular	Retail	SuperCenter	Front End	402-Baggers	Bagger		

Labor Levels Matched and Ignored

MATCH_1	MATCH_2	MATCH_3	MATCH_4	MATCH_5	MATCH_6	MATCH_7
Matching on Labor Level 1	Matching on Labor Level 2	Matching on Labor Level 3	Labor Level 4 Ignored for Matching	Labor Level 5 Ignored for Matching	Labor Level 6 Ignored for Matching	Labor Level 7 Ignored for Matching

This shows the layout of the report. The shifts of the initial person within the designated timeframe are shown in the top frame, along with the related labor levels It also shows the pay codes of the initial person. The shifts of Colleagues are shown in the lower frame, showing similar information for the colleagues. It shows the shifts of the colleagues which overlap those of the initial person.

5. Clicking on a row in the top frame will filter the lower frame by the specific shift. The lower frame will then show only the colleague shifts which overlap the selected shift.

6. You can exclude (filter) certain paycodes of the initial person if they should not be included in the view. For example, an employee may have clocked in with an absence (excused or unexcused) or time off.

7. You can also exclude (filter) certain paycodes of the colleagues if they should not be included in the view. For example, an employee may have clocked in with an absence (excused or unexcused) or time off.

8. The bottom of the report shows the Labor Levels included or excluded for matching colleagues with the initial employee. For example, a Labor Level indicating physical building would be included, while a Labor Level which indicates a job level could be excluded. The report would then identify colleagues who worked in the same building as the initial employee, but the job level would not be considered for matching overlapping shifts.

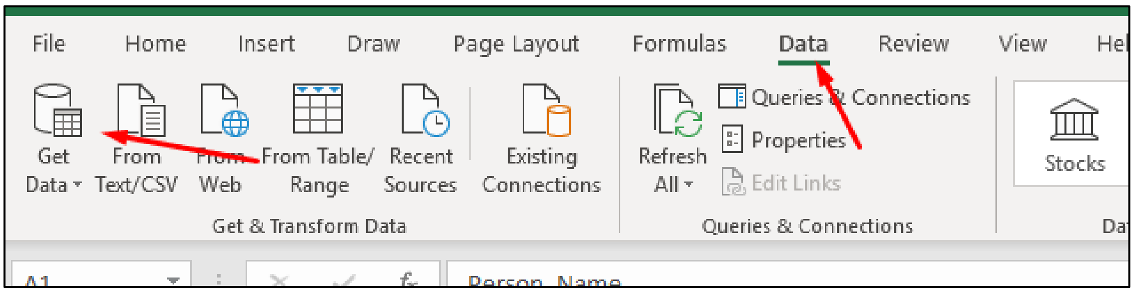
Excel Template

Refreshing the information reported – Changing the Data File Location

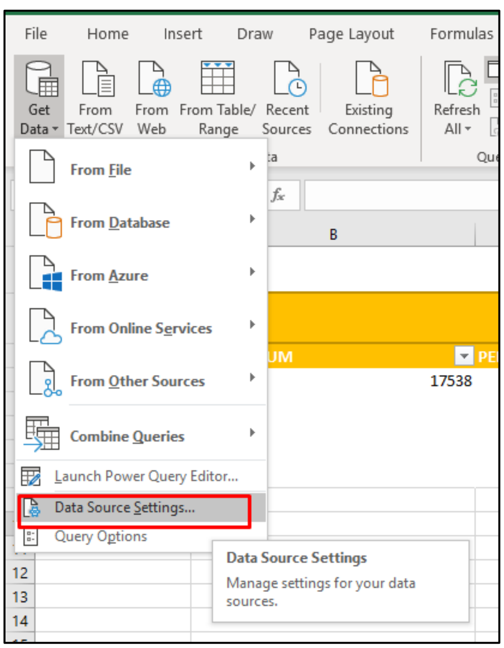
For each initial person to review, it is necessary to refresh the data shown with the data file created from the latest extract.

Note that depending on your version of Excel, the menus and buttons shown may look different from your version.

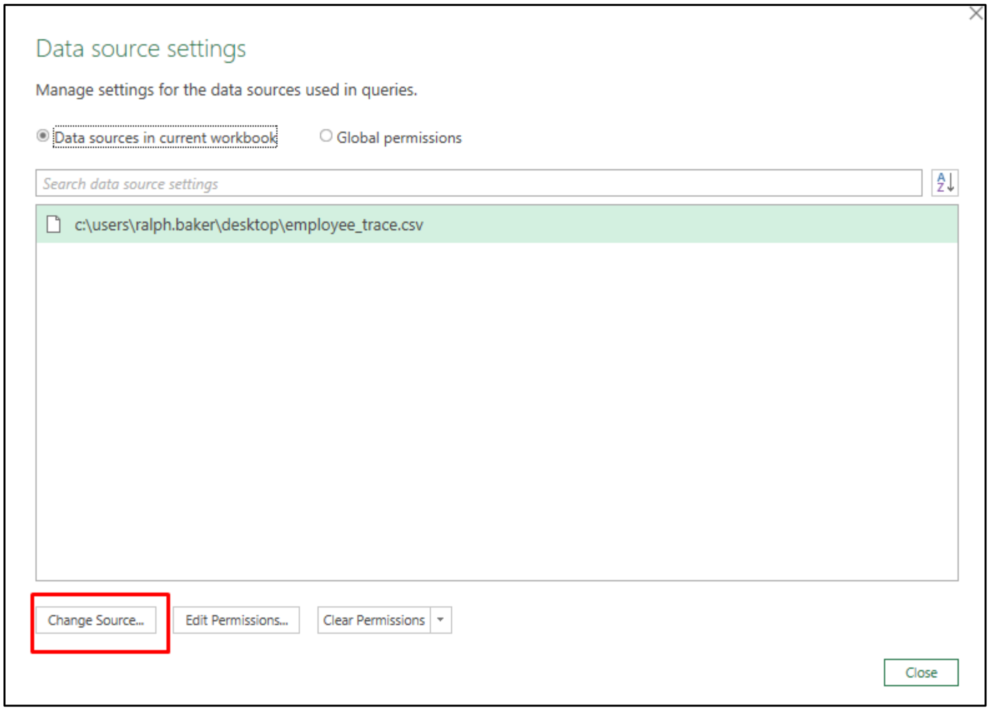
The first time this step is run, you will likely need to locate the new csv file location. From the Data tab, select Get Data.

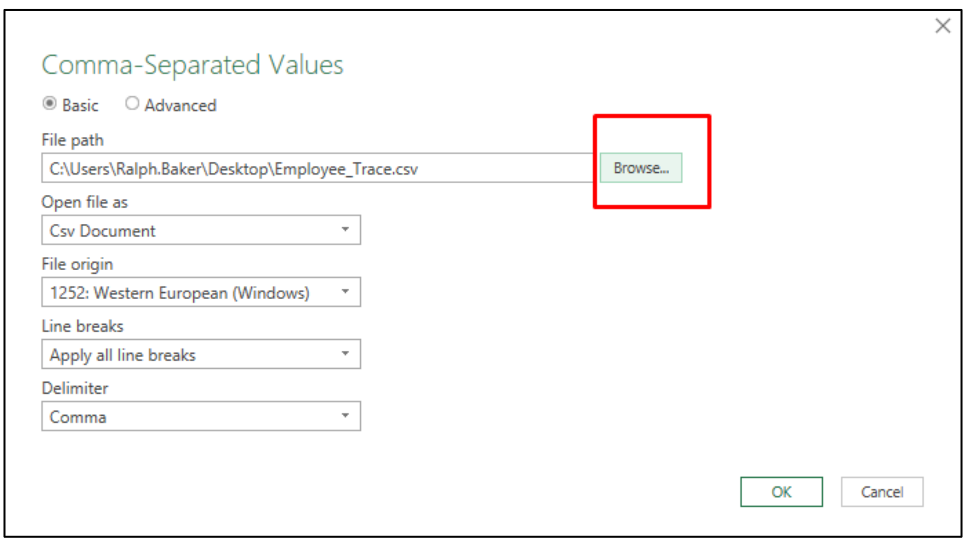


From the pop-up menu select Data Source Settings.



From the Data Source settings window, select Change Source. Navigate to the find the correct file for your system, and close all windows.

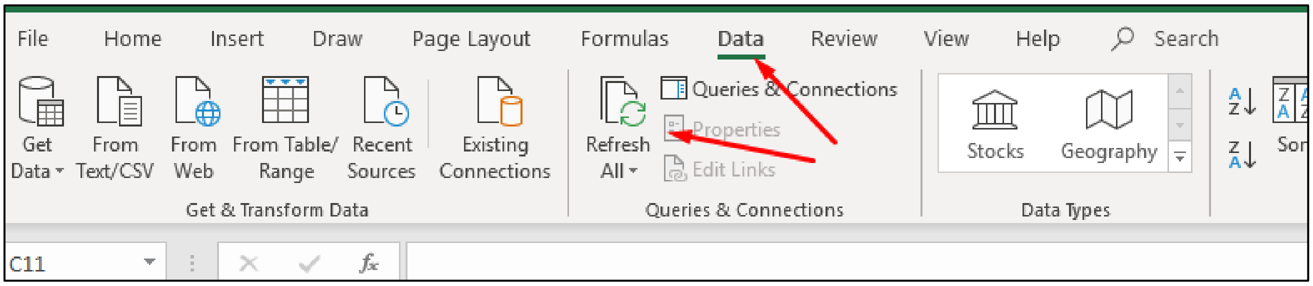




Save the template with the new location. From now on, as long as new data files are kept in the same place with the same name, refreshing the data with new information can be done with one click.

Refreshing the information reported – Same Location

In the Data tab, click Refresh All, as shown.



Viewing the Report

The initial Employee tab shows the initial employee number and the times worked for the employee during the selected time period.

To see the colleagues working with this employee click the See Colleagues link. This will display the **Colleagues** tab (below)

KRONOS Employee Trace Tool — See Colleagues

Initial Person - Time Segments Worked

PERSONNUM	PERSON_START	PERSON_END	Person_Paycode	LABORLEV1DSC	LABORLEV2DSC	LABORLEV3DSC	LABORLEV4DSC	LABORLEV5DSC	LABORLEV6DSC	LABORLEV7DSC
17538	1/26/14 10:45	1/26/2014 13:45	Regular	Retail	SuperCenter	Front End	-	Cashier		
	1/31/14 17:15	1/31/2014 20:15	Regular	Retail	SuperCenter	Front End	-	Cashier		
	2/1/14 11:00	2/1/2014 13:15	Regular	Retail	SuperCenter	Front End	-	Cashier		
	2/1/14 13:15	2/1/2014 15:00	Regular	Retail	SuperCenter	Front End	-	Cashier		
	2/8/14 17:15	2/8/2014 20:30	Regular	Retail	SuperCenter	Front End	-	Cashier		

The **Colleagues** tab displays the colleagues and the overlapping times worked.Click the Initial Employee link to return the initial employee display.

Initial Employee

Colleagues - Time Segments Worked

Colleague_Name	PERSONNUM_2	Colleague_START	Colleague_END	Colleague_Paycode	Colleague_Level_1	Colleague_Level_2	Colleague_Level_3	Colleague_Level_4	Colleague_Level_5	Colleague_Level_6	Colleague_Level_7
Gavin, Martha	**114**	2/1/2014 10:00	**2/1/2014 11:00**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
		2/1/2014 11:30	**2/1/2014 17:00**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
Kamensky, Annie	**110**	1/26/2014 11:15	**1/26/2014 13:30**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
		1/26/2014 13:30	**1/26/2014 15:15**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
Lester, Rick	**216**	2/8/2014 19:15	**2/8/2014 21:00**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
Long, Vanessa	**115**	1/26/2014 10:00	**1/26/2014 12:30**	Regular	**Retail**	SuperCenter	**Front End**	402-Baggers	**Bagger**		
		1/26/2014 12:30	**1/26/2014 14:15**	Regular	**Retail**	SuperCenter	**Front End**	402-Baggers	**Bagger**		
		1/31/2014 17:00	**1/31/2014 18:45**	Regular	**Retail**	SuperCenter	**Front End**	402-Baggers	**Bagger**		
		1/31/2014 19:15	**1/31/2014 19:45**	Regular	**Retail**	SuperCenter	**Front End**	402-Baggers	**Bagger**		
		2/8/2014 15:15	**2/8/2014 18:30**	Regular	**Retail**	SuperCenter	**Front End**	402-Baggers	**Bagger**		
McKenna, Todd	**41**	1/26/2014 12:30	**1/26/2014 15:15**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
McNulty, Wendy	**105**	1/31/2014 16:45	**1/31/2014 18:00**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
		1/31/2014 18:30	**1/31/2014 23:00**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
Stein, Elliot	**108**	2/1/2014 11:15	**2/1/2014 14:30**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		
		2/1/2014 14:30	**2/1/2014 17:00**	Regular	**Retail**	SuperCenter	**Front End**	401-Cashiers	**Bagger**		