# Kronos Solution Services

# Installation Document
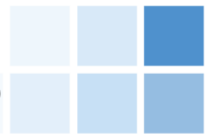
**For: Employee Contact Tracing**

*User Guide 6.3 and Above*

**Version [4]**

**Revision Date:  August 31, 2020**

## TABLE OF CONTENTS

## 1.1.1  REVISION HISTORY

| Revision | Date | Author | Description |
|----------|------|--------|-------------|
| 1.00 | 5/28/2020 | Walter Lowry | Baseline Statement of Work |
| 2.00 | 6/3/2020 | Walter Lowry | Update copyright date info |
| 3.00 | 6/24/2020 | Walter Lowry | Updated installation notes information |
| 4.00 | 8/31/2020 | Walter Lowry | Updated installation notes information |

## 1.1.2  FILE INSTALLATION

This portion of the installation will instruct you on where to place the physical files in your Kronos environments.

### 1.1.2.1    Report file installation

The following process MUST be performed on ALL application servers AND INSTANCE in the Kronos environment that are configured to run reports.  All of the files referenced below are found in the zip file **EmpContactTracing.zip**.

#### 1.1.2.1.1    Report files included in your solution

- EmployeeContactTracingSQL.rdl      (For SQL Clients)
- EmployeeContactTracingOra.rdl  (For Oracle Clients Only)

Note the other SQL script files also provided will be used later.

#### 1.1.2.1.2    Custom report location on servers

The reports should be placed in the following folder / directory structure

<Kronos Install Drive> \ <Kronos Install Folder>\<Kronos Instance>\reports\otherreports2008

Example: c:\kronos\wfc\report\otherreports\2008

## 1.1.3  CUSTOM REPORT OPTIONS

Custom report options are usually needed to add additional report data filtering.  Your custom report(s) will require the following Custom report Options be configured (If NONE is listed below, you can skip to the next section). --- NOTE: If these custom options already exist, check to make sure they are set up as listed below, but it is not necessary to re-create them.  Instructions on how to check for them or create them are below this table.

### 1.1.3.1    Your required custom report options – Labor Levels to Match On

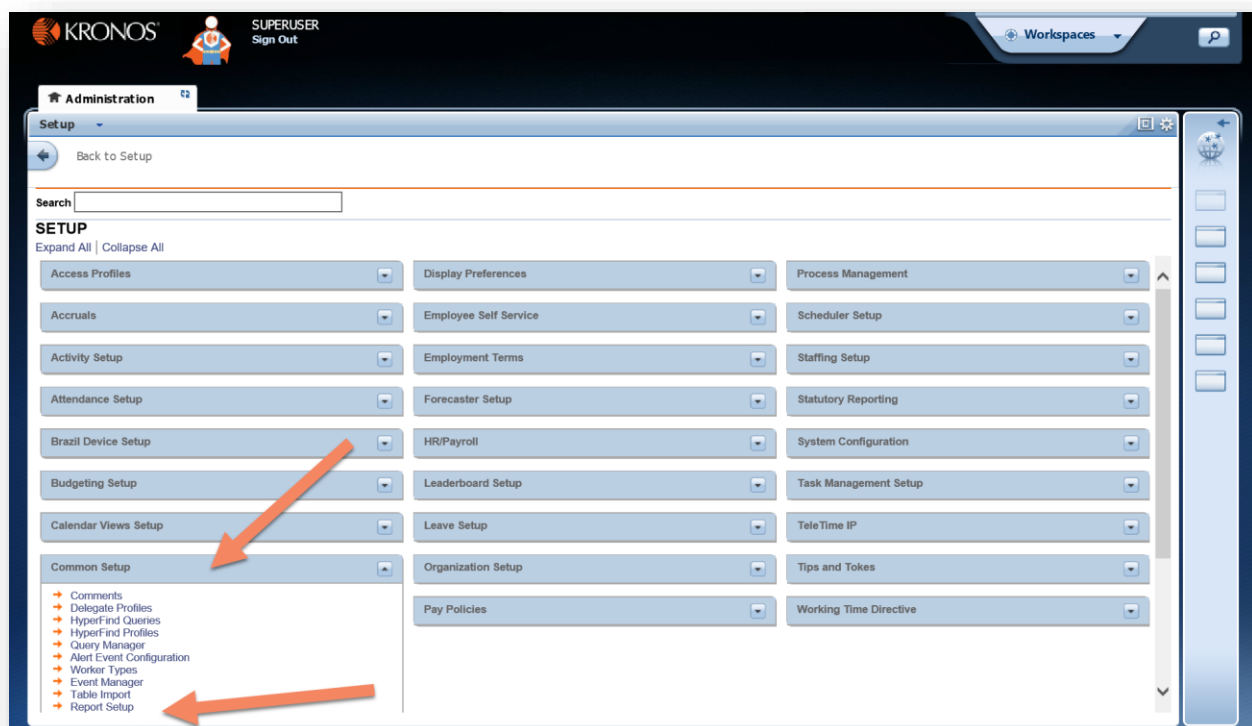| Option Name (Must use this name) | **SelectLabor** | |
|---|---|---|
| Description | Select 1 or more labor levels to match on | |
| Value Type | Number | |
| Display at Run Time | Description | |
| ☐Create Header | ☒Allow to pick Multiple values at run time | |
| Pick List Values  - These must show in the custom option as they appear in this example.   Descriptions are Suggestions and can be modified to meet your needs.<br><br>**In this example all 7 labor levels are listed.  In fact, you only need to list the labor levels that you wish to match on.  If say for example that Labor Level 2** | **Value** | **Description** |
| | 1 | Labor Level 1 |
| | 2 | Labor Level 2 |
| | 3 | Labor Level 3 |

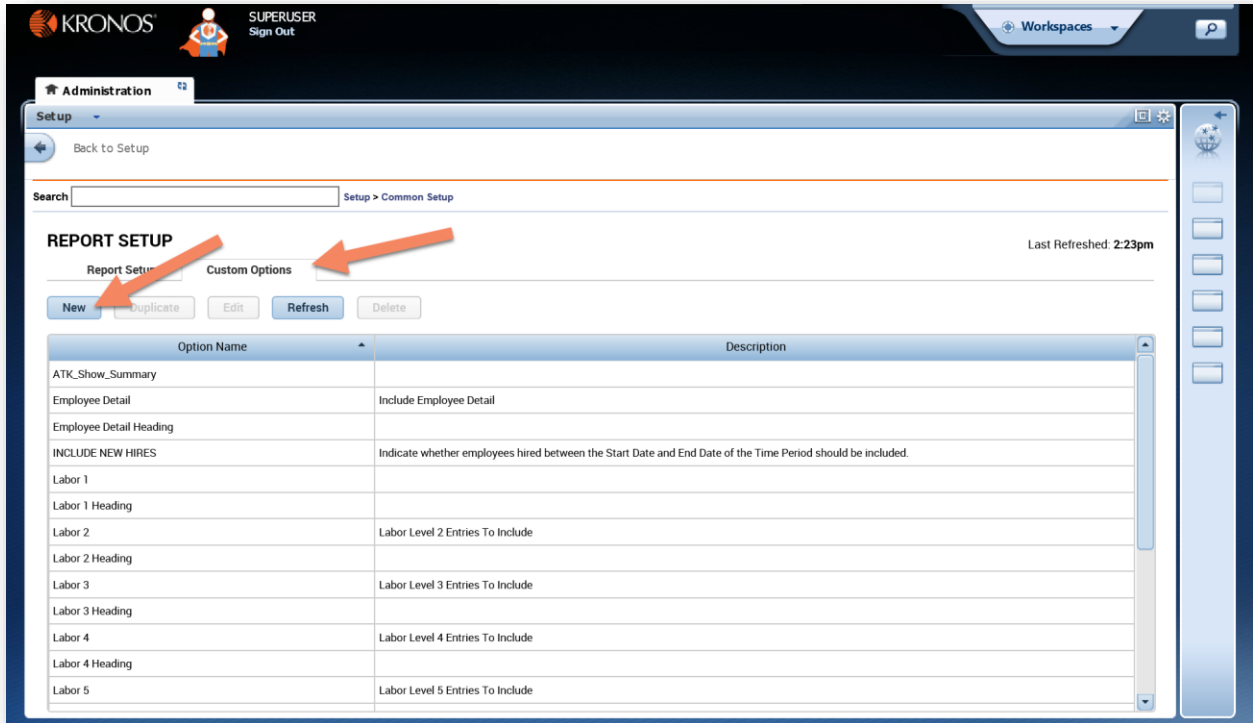| **and Labor Level 5 are erroneous for the purpose of employee contact tracing then they would not need to be included in this option.** | 4 | Labor Level 4 |
| | 5 | Labor Level 5 |
| | 6 | Labor Level 6 |
| | 7 | Labor Level 7 |

(Custom Options - Labor Levels to Match On)

### 1.1.3.2   How to create your custom report options

- Log into Kronos as a user that has access to administer reports (Example: SuperUser)
- Click on the setup link located in the upper left corner of the application
- Scroll down to the "Common Setup" section and select "Report Setup"

- Click on the "Custom Options" tab
- Click "New" from the menu bar

Add the Labor Levels to match on with the below settings.  Feel free to substitute Labor Level # under Description with your actual labor level name descriptions.  Reminder – you only need to include those labor levels that you wish to be able to use to run this report with.

Click the + sign to add additional Labor Levels:

If using all 7 labor levels your screen should look similar to this:



- Click "save" from the menu bar

### 1.1.3.3   Your required custom report options – Search Person Number

| Option Name (Must use this name) | **Search Person Number** |
|---|---|
| Description |  |
| Value Type | String |
| Display at Run Time | Value |
| ☐Create Header | ☐Allow to pick Multiple values at run time |

| Pick List Values - N/A | Value | Description |
|---|---|---|
| | | |
| | | |
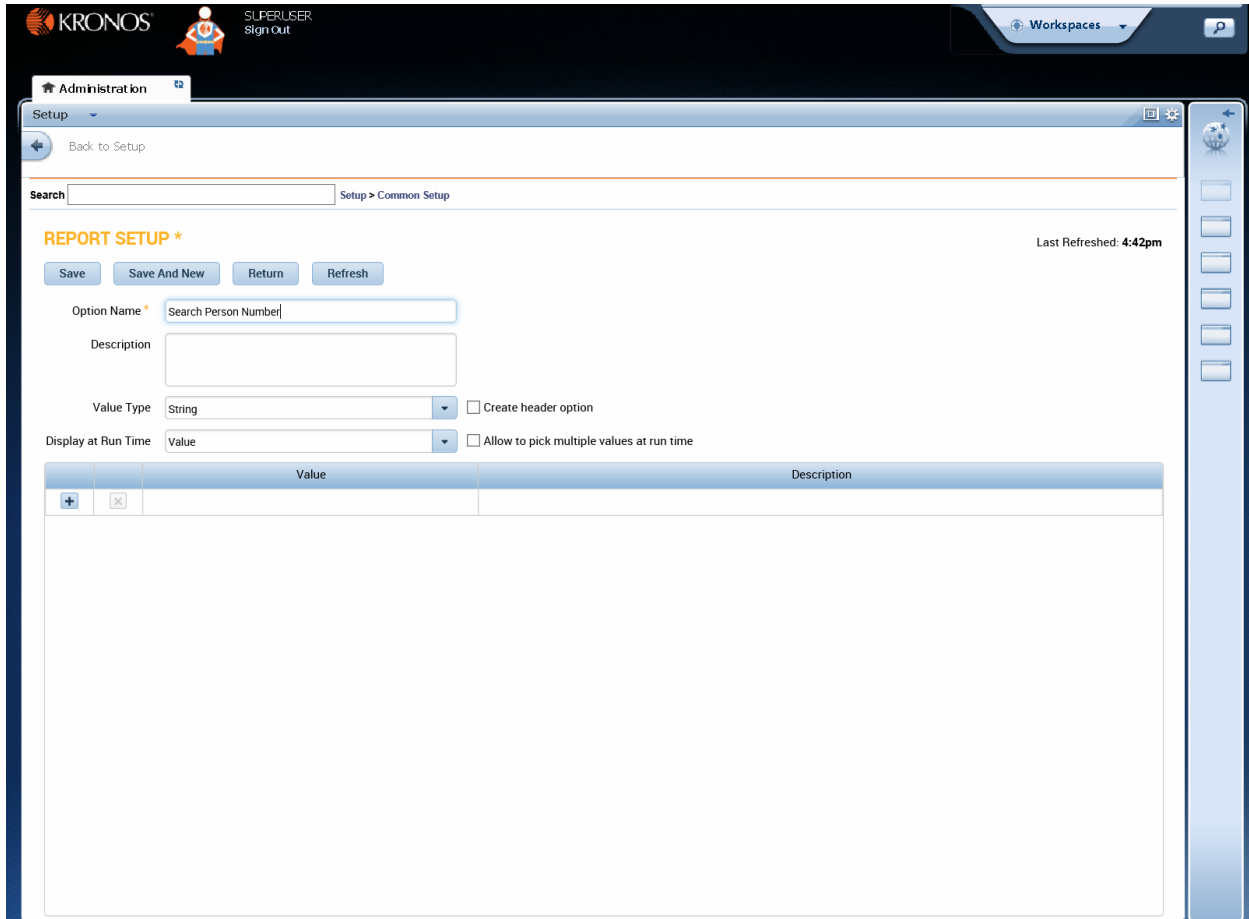
Next setup the 2ⁿᵈ custom report option needed – Search Person Number.  Similar to creating the labor level report option, select Custom – New:
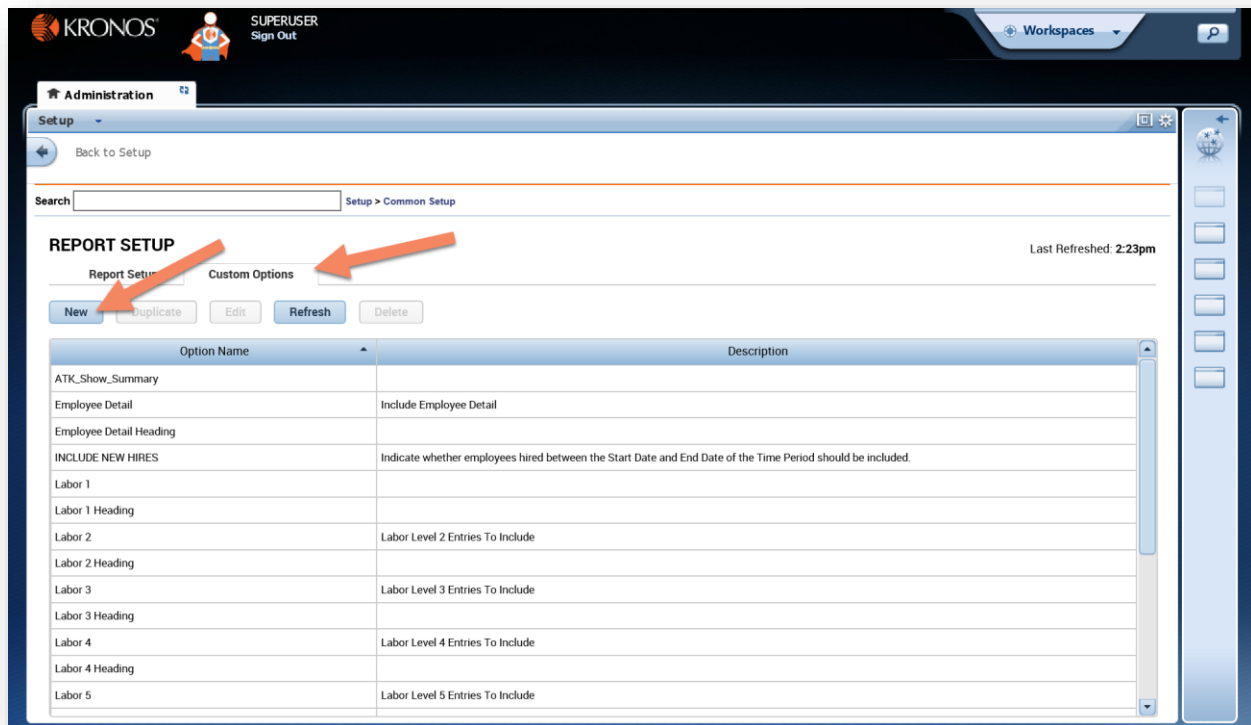
Then setup the new Search Person number option like you see below:



Click Save.
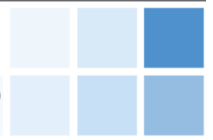
## 1.1.4 ADD REPORTS INTO THE APPLICATION

| | |
|---|---|
| New or Duplicate | ☒New  ☐Duplicate |
| If Duplicate: report name to duplicate | N/A |
| Report Type | Default |
| Report Name (suggestion) | Employee Contact Tracing Report |
| Report File Name (this is case sensitive) | EmpContactTracingSQL.rdl (For SQL Clients) <br><br> EmpContactTracingOra.rdl (For Oracle Clients Only) |
| Report Description (suggestion / optional) | Type a meaningful description for this report |
| ☐Requires Hyperfind Query | ☐Contains Totals Data |
| ☐Limit number of Employees | Number of employees (if Checked) |
| Time Periods: | DATE RANGE ONLY (this report does not work with previous, current or next) |

| |
|---|
| ☐Use Accelerators (Not User Selectable) |

| |
|---|
| ☐Analytics Report <br> ☐2005 RDL Format <br> ☒2008 RDL Format |

| | |
|---|---|
| Selected Options: | From Time period |
| | SelectLabor |
| | Printed For |
| | Search Person Number |
| | To Time Period |
| | Time Period Heading |

## 1.1.4.1    Report configuration instructions

- If you aren't still logged in, log into kronos as a user that has access to administer reports (Example: SuperUser)
- Click on the setup link located in the upper left corner of the application
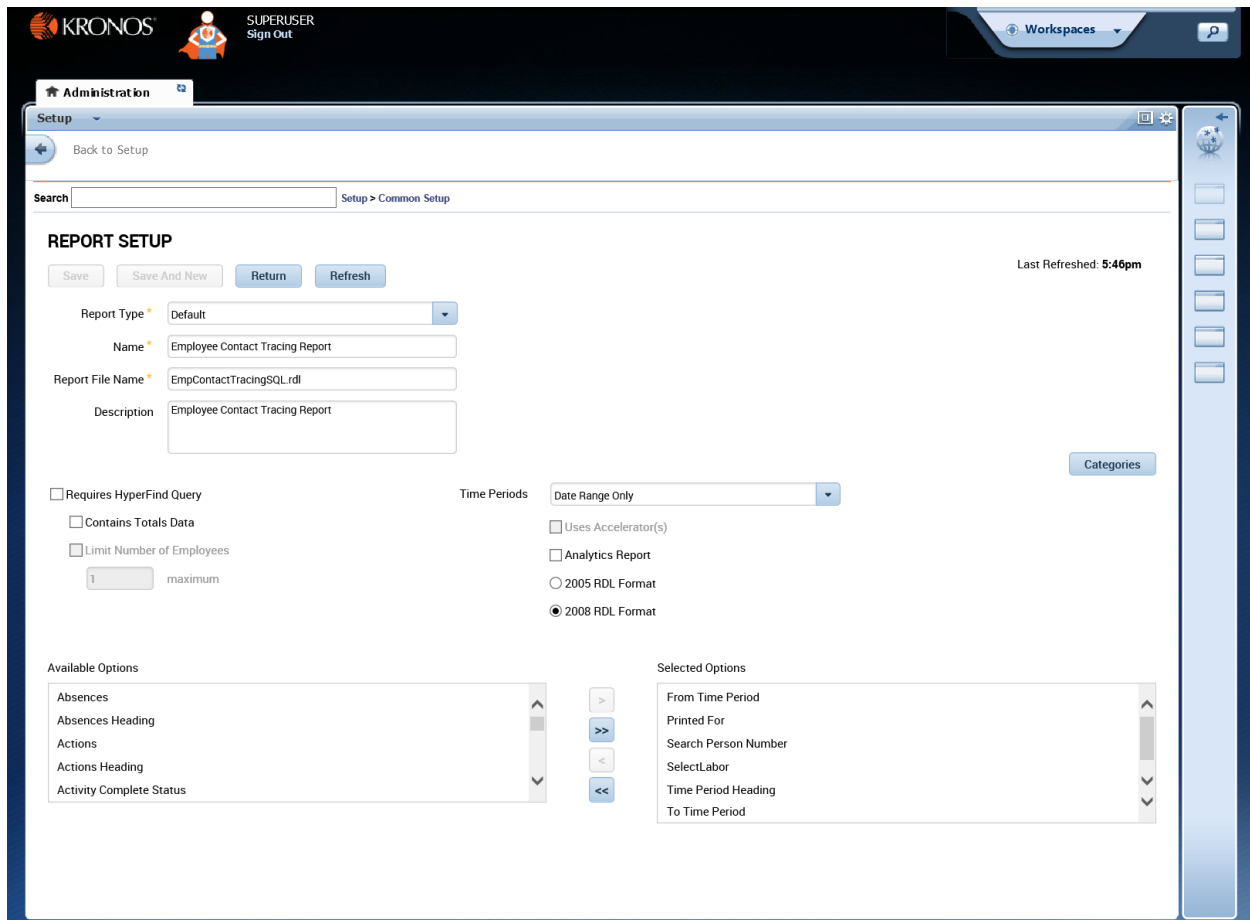- Scroll down to the "Common Setup" section and select "Report Setup"
- Click the "Report Setup" tab
- Click new
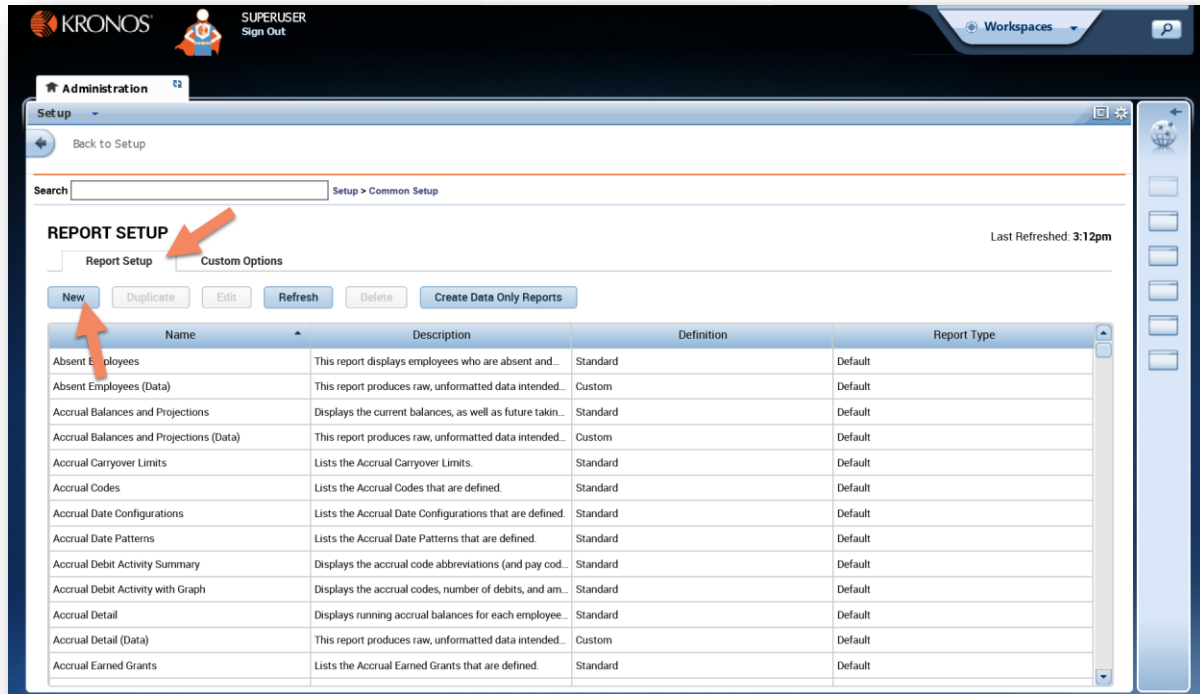


- Fill in the screen as specified in the table(s) above
    - o  Notes:
        - Any fields that state "(suggestion)" can be changed to your preferences
            - The report name is what will display in the report navigation menu
            - The report description will show as a description of the report
        - Uses Accelerators will always be grayed out in the application.  If the report was duplicated, and the report that the custom report used accelerators, this will be selected, otherwise it will be un-checked
        - Report file names MUST be entered exactly as listed (this is case sensitive)
        - **If "2008 RDL format" is selected in the table above, and you do not have that option available in your set-up screen, cancel your current setup process and proceed to step 1.1.4.2**

When complete your screen should look like the below:



- Click Save from the Menu Bar

- You will get a pop up for where the report should appear in your report listing.  Click the categories of where you would like the report to display under.  Ex. Other Reports, etc.
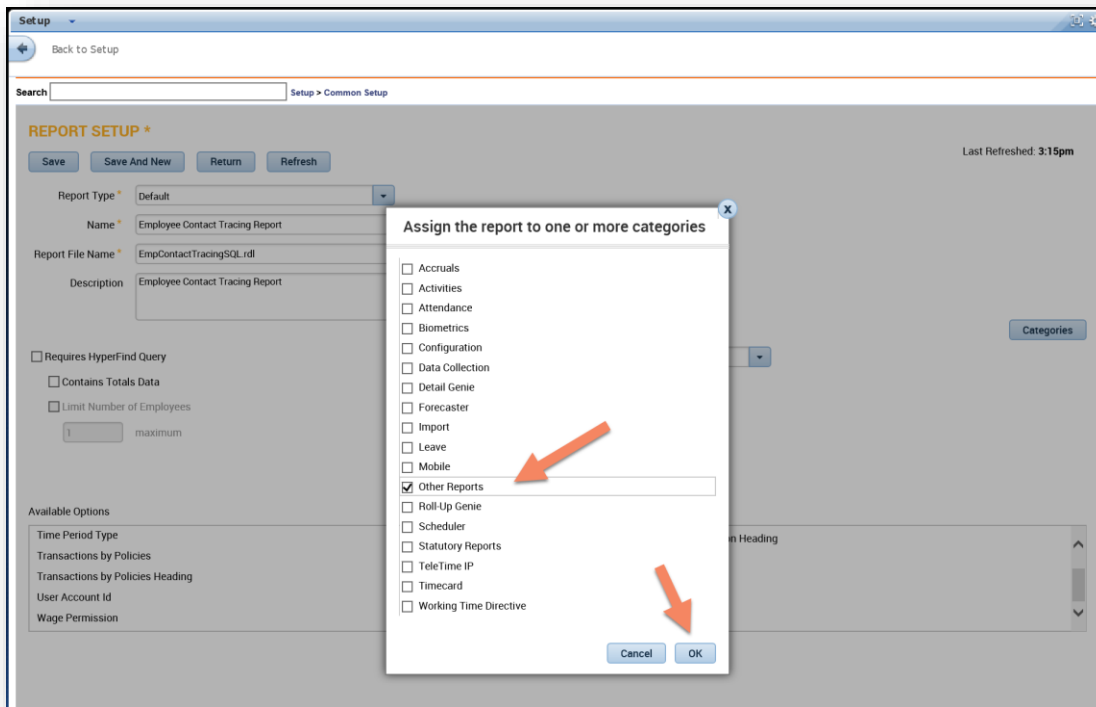


You should then see a "Report successfully added" message:
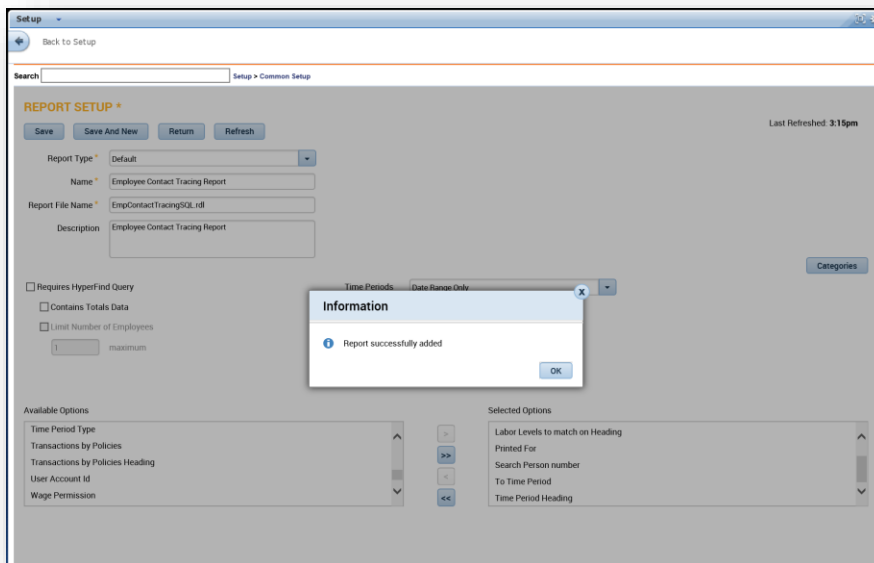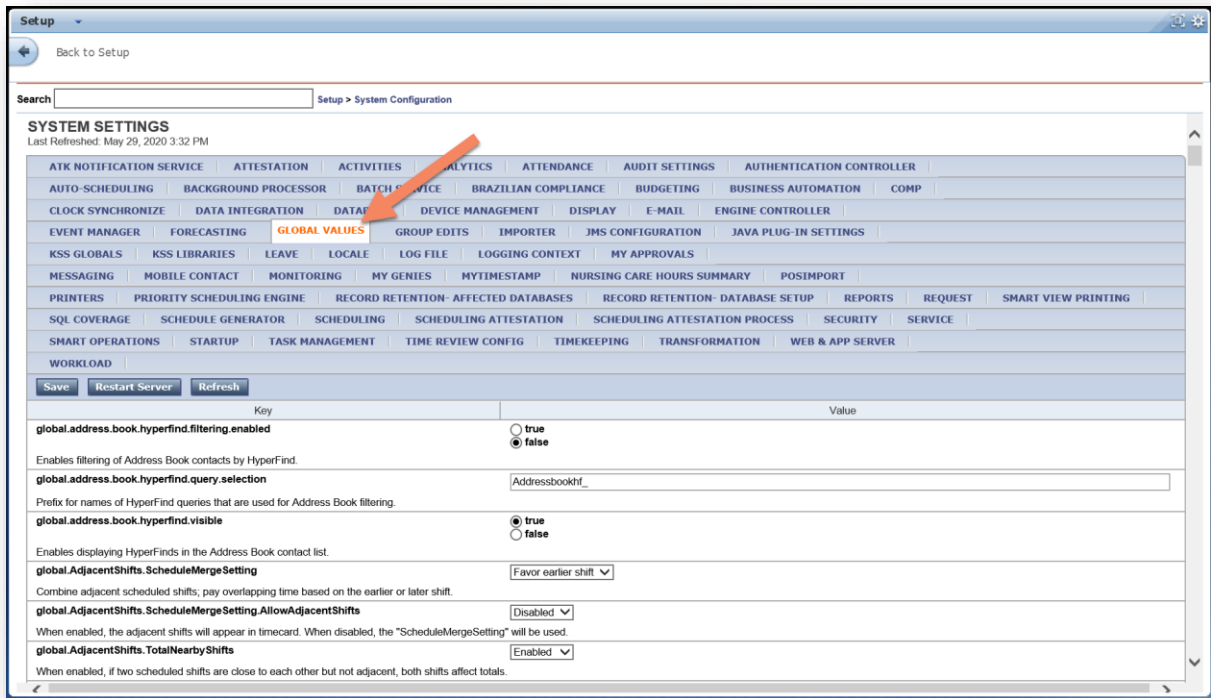
## 1.1.4.2    2008 RDL Format is missing on my screen and I am supposed to select it

- Click on the **Setup** link located in the upper left corner of the application
- Go to S**ystem Configuration -> System Settings**

- Click "**Global Values"** tab

- Find **global.Reporting.Engine** setting
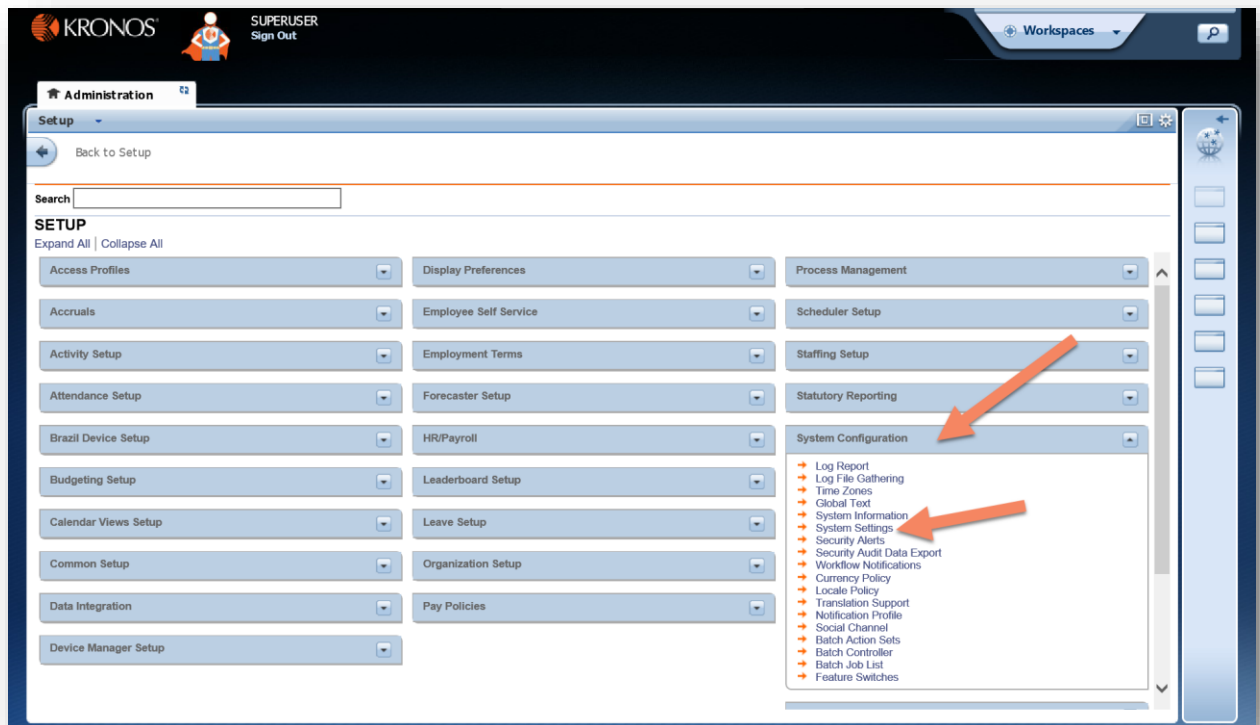- Set this value to **Sql Server Reporting Services 2008**



- Click **Save**
- Return to prior step (Report Configuration Instructions) and enter your report(s) into the system
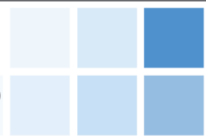
## 1.1.5  INSTALL DATABASE SCRIPTS

### 1.1.5.1  Scripts required for your solution

Below is a list of the database scripts required for your solution.

1.  EmployeeContactTracing_SQL.sql  (For SQL Clients)
2.  EmployeeContactTracing_ORA.sql (For Oracle Clients Only)

### 1.1.5.2  Database script installation process

It is suggested that the database script installation be performed by a database administrator

- MS Sql Server
  - o  Using Sql Server management studio
    - Log into the kronos database (for the specific kronos environment you are installing the report into) as the DATABASE OWNER (example: tkscowner)
    - Run the script names listed above against the **Kronos database**
      - IMPORTANT: Only run the EmployeeContactTracing_SQL.sql
      - Note: If you receive an error stating that an object cannot be dropped, and this is the first time that this script is being run, this error can be ignored.  All other errors should be reported to the report designer / creator.

- Oracle
  - o  Using Sql Plus
    - Log into the kronos database (for the specific kronos environment you are installing the report into) as the DATABASE OWNER (example: tkscowner)
    - Run the script names listed above against the kronos database
      - IMPORTANT: Only run the EmployeeContactTracing_ORA.sql
      - Note: If you receive an error stating that an object cannot be dropped, and this is the first time that this script is being run, this error can be ignored.  All other errors should be reported to the report designer / creator.

Ex: In SQL Server Management Studio – Select the Kronos database (note that your database name will be different than below example) – Execute the EmployeeContactTracing_SQL.sql and you should receive a Successful Completion message:
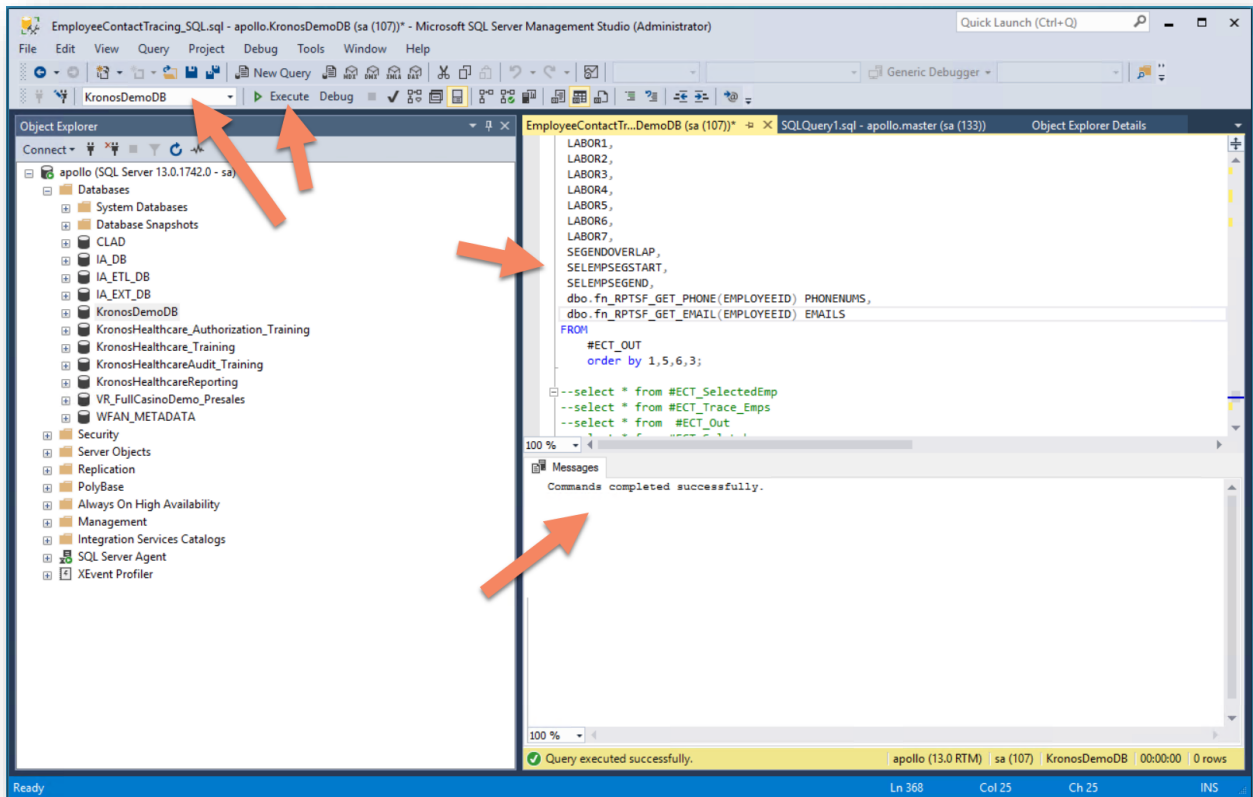
## 1.1.6  GRANT ACCESS TO THE REPORT

Update all Report Access Profiles that require access to the report to include the newly entered custom report(s).
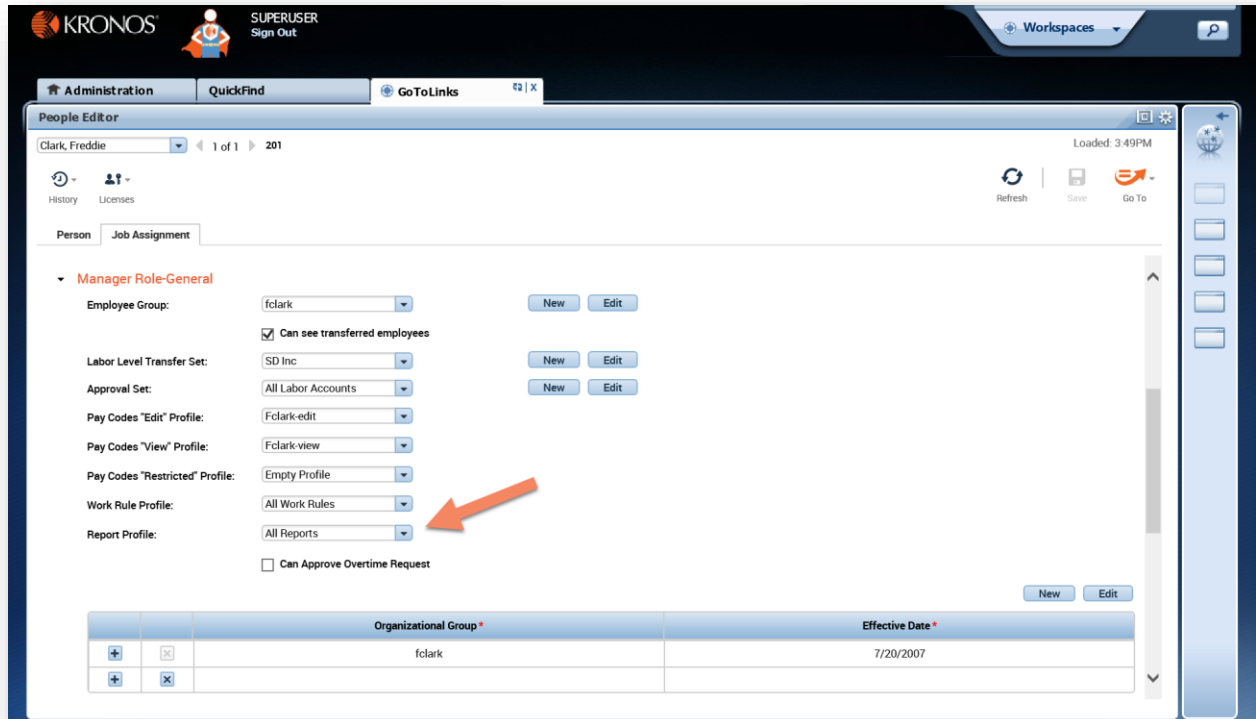
Setup – Access Profiles – Data Access Profiles – Reports:
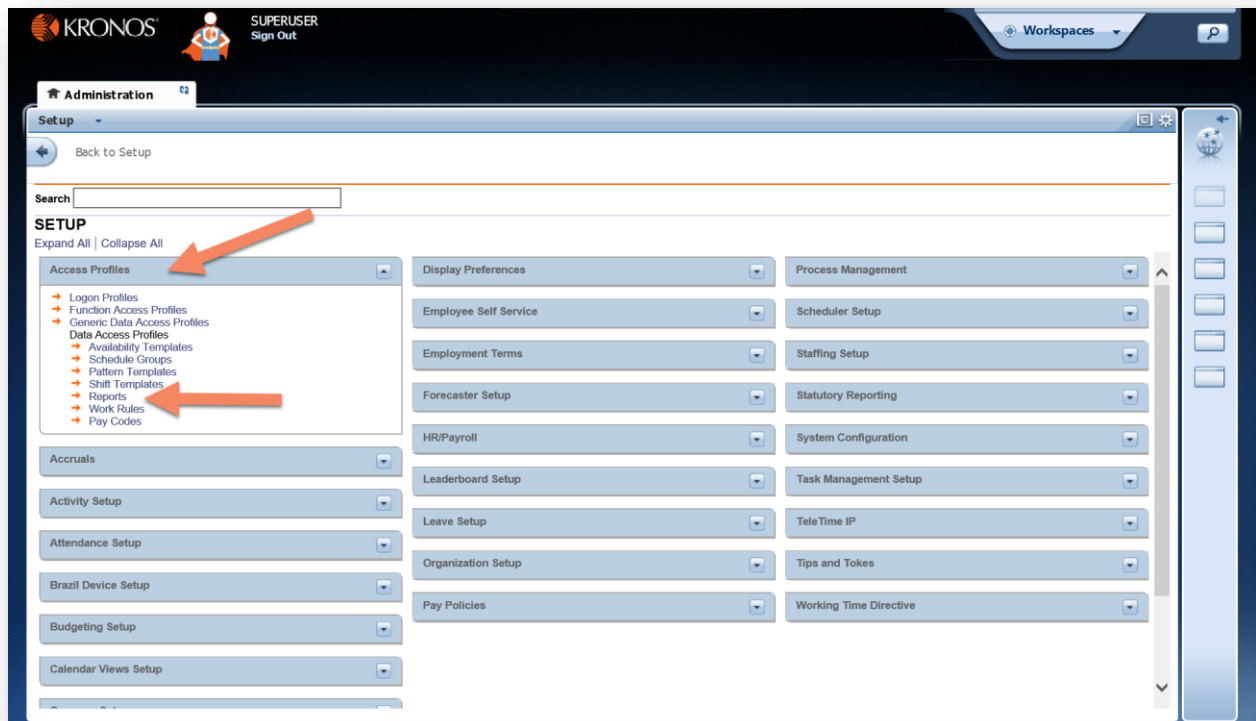
Select the Employee Contact Tracing Report and add via the top arrow and click Save.
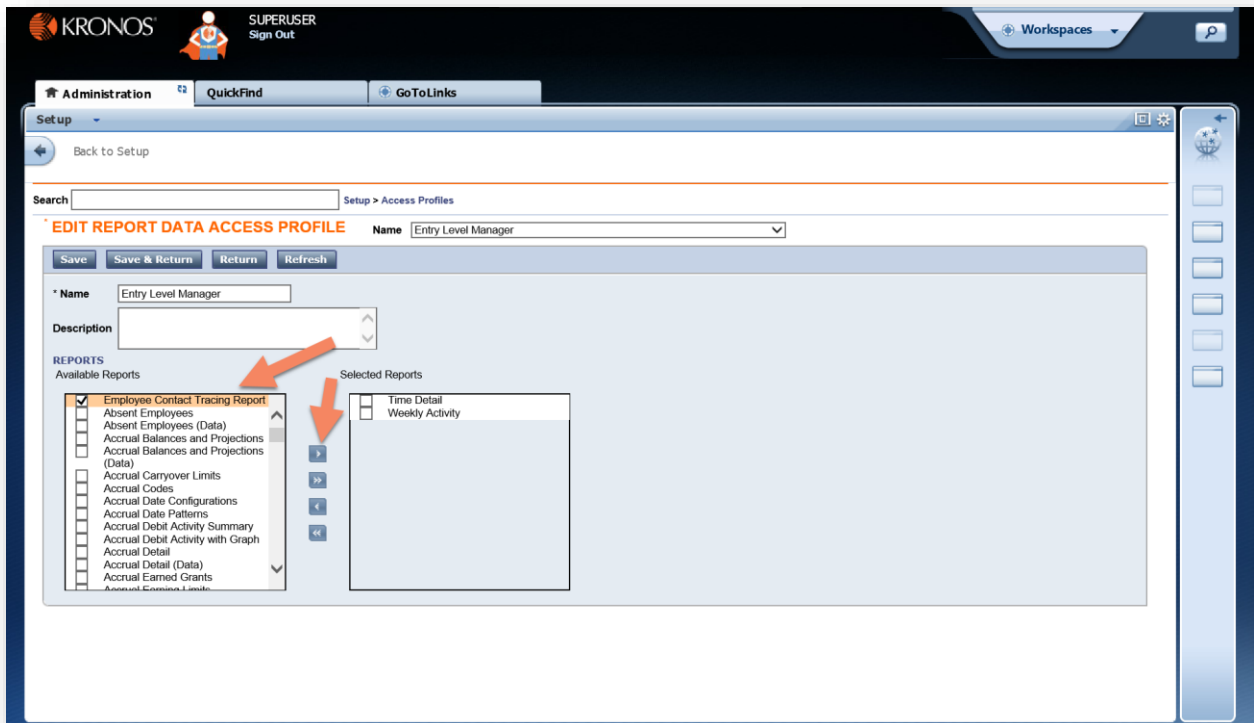
Note if you aren't sure which report profile you need to update, you can check the users that you would like to have access to the report and see which report profile is set in their People Record under Job Assignment Tab – Manager Role-General:
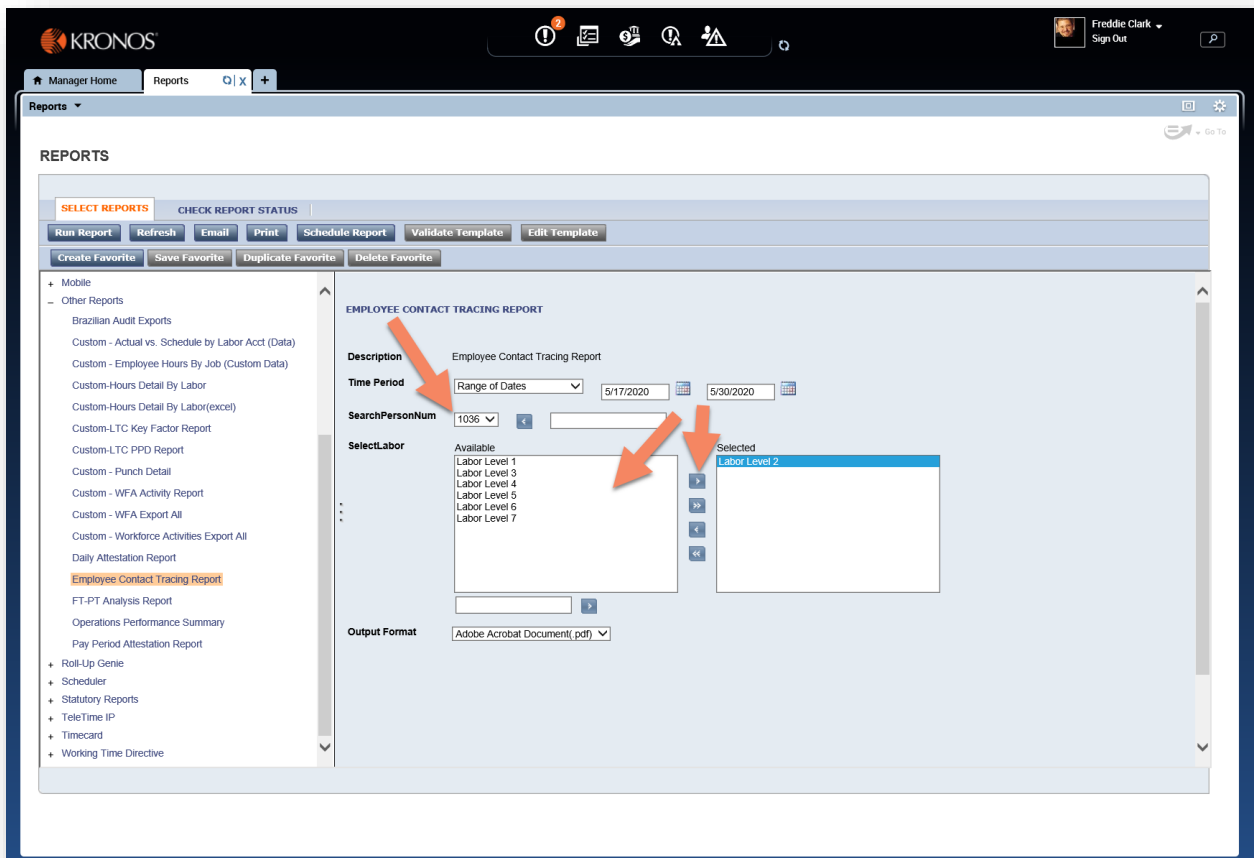
## 1.1.7  TESTING THE REPORTS

- Log into Kronos and select "Reports" from the General tab
- Select the report from the categories list
  - ○ Report will be located under the heading(s) you selected prior
  - ○ Note: It may take up to 3 minutes for the report to be available for the first time
- Select a Timeframe
  - ○ You must use Range of Dates for this report.  Because of the possibility of employees working across day divides this report is programmed to look for anyone who worked the day before or day after the selected employee but had overlapping shifts that crossed the day divide.
- Enter the Person Number of who you are running the report for and select the Arrow to enter the number:

Then Select the labor level(s) to match on:

Then finally select the output format Excel (recommended) or PDF and click the Run Report button upper left:
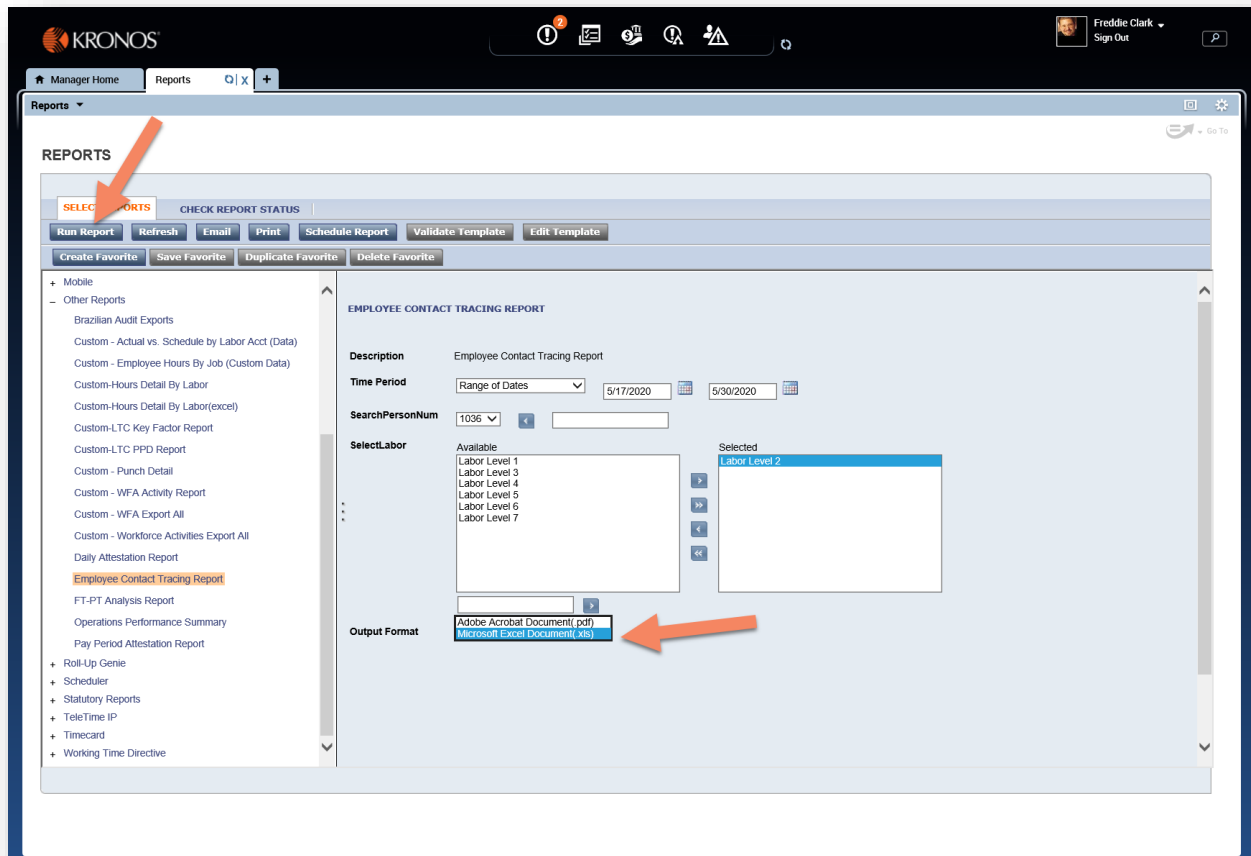


- If the report was optimized for PDF output
  - o  Click the run button and wait for the report to finish
  - o  Click the "Check Run Status" tab
  - o  Click REFRESH to update the report status
  - o  Once complete, select the report and click view
  - o  Confirm Output of report
- If the report was optimized for Excel Output
  - o  For WFC 6.3
    - ▪  Select Excel as the output format from the options screen
    - ▪  Click the run button and wait for the report to finish
    - ▪  Click the "Check Run Status" tab
    - ▪  Click REFRESH to update the report status
    - ▪  Once complete, select the report and click view
  - o  Confirm output of report

Select View Report to open:
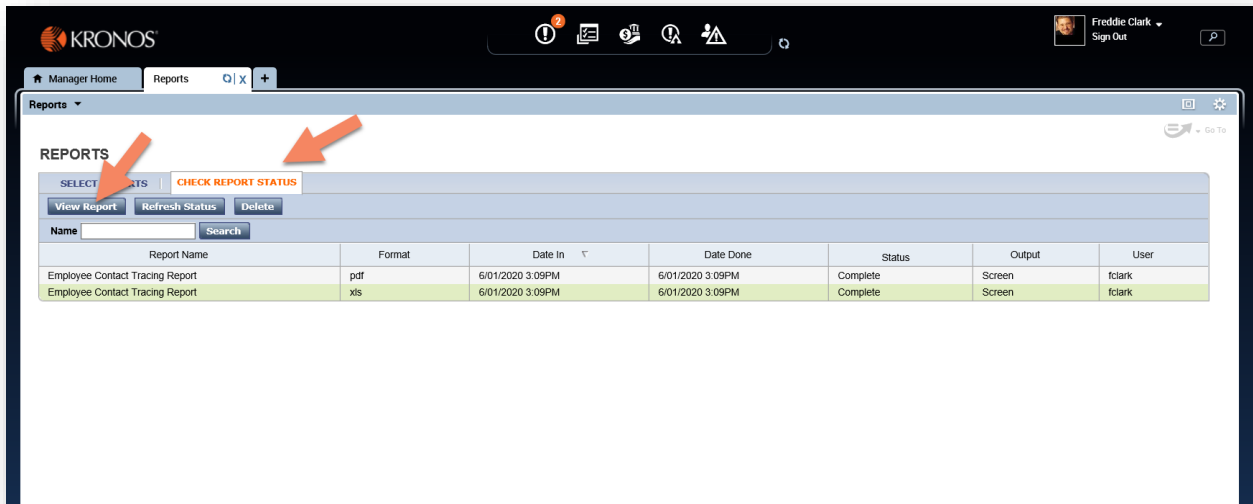


## 1.1.8  EXAMPLE OF REPORT OUTPUT

**PDF:**

Excel:

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Employee Contact Tracing Report | | | | | | | | | | | | | | | |
| 2 | Time Period: 5/17/2020  -  5/30/2020 | | | | | | | | | | | | | | | |
| 4 | Labor Levels: 2  Employee Lookup: 1036 | | | | | | | | | | | | | | | |
| 6 | Printed For: fclark | | | | | | | | | | | | | | | |
| 9 | PersonNum | FULLNAME | EVENTDTM | TraceEmpStart | TraceEmpEnd | SelectEmpStart | SelectEmpEnd | LL1 | LL2 | LL3 | LL4 | LL5 | LL6 | LL7 | PHONENUMS | EMAILS |
| 10 | 1036 | Cane, Mary | 5/18/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 11 | 1036 | Cane, Mary | 5/19/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 12 | 1036 | Cane, Mary | 5/20/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 13 | 1036 | Cane, Mary | 5/21/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 14 | 1036 | Cane, Mary | 5/22/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 15 | 1036 | Cane, Mary | 5/25/2020 | | | | | | | | | | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 16 | 1036 | Cane, Mary | 5/25/2020 | 7:00:00 AM | 3:15:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 17 | 1036 | Cane, Mary | 5/26/2020 | | | | | | | | | | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 18 | 1036 | Cane, Mary | 5/26/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 19 | 1036 | Cane, Mary | 5/27/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 20 | 1036 | Cane, Mary | 5/28/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 21 | 1036 | Cane, Mary | 5/29/2020 | 7:00:00 AM | 3:30:00 PM | | | 101 | 208 | 350 | 480 | 655 | | | Cell:(978)324-8521`Home:(978)732-8572 | |
| 22 | 10 | Snow, Fred | 5/18/2020 | 7:00:00 AM | 3:30:00 PM | 7:00:00 AM | 3:30:00 PM | 101 | 208 | 352 | 467 | 507 | | | Cell:(813)333-2918`Home:(813)333-1212 | &W:allemplo yees |
| 23 | 1014 | Gamble, Morgan | 5/18/2020 | 7:00:00 AM | 3:30:00 PM | 7:00:00 AM | 3:30:00 PM | 101 | 208 | 351 | 455 | 682 | | | Cell:(555)555-4432`Home:(346)359-8631 | |
| 24 | 1018 | Watts, Anglea | 5/18/2020 | 7:00:00 AM | 3:30:00 PM | 7:00:00 AM | 3:30:00 PM | 101 | 208 | 351 | 456 | 681 | | | Cell:(302)928-2931`Home:(302)291-3912 | |
| | 1019 | Natri, Joan | 5/18/2020 | 7:00:00 AM | 3:30:00 PM | 7:00:00 AM | 3:30:00 PM | 101 | 208 | 351 | 455 | 682 | | | Cell:(937)291-9321`Home:(937)555- | |

Sheet1   ⊕
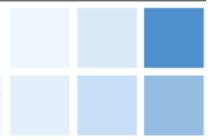
## 1.1.9  SOURCE OF COLUMN DATA IN THE APPLICATION

| Column Name | Application Source of Data |
| --- | --- |
| PersonNum | ID as entered in the WTK person record (ID of the person being tracked will appear with Gray background) |
| FULLNAME | Last Name, First Name Middle Initial as entered in the WTK person record. (Name of the person being tracked will appear with Gray background) |
| EVENTDTM (Apply date of event) | Apply date of event |
| TraceEmpStart | Shift Start time of the employees who came in contact with the employee being tracked. |
| TraceEmpEnd | Shift End time of the employees who came in contact with the employee being tracked. |
| SelectEmpStart | Shift start time of the employee who is being tracked |
| SelectEmpEnd | Shift end time of the employee who is being tracked |
| LL1 | Labor Level 1 Worked Account |
| LL2 | Labor Level 2 Worked Account |
| LL3 | Labor Level 3 Worked Account |
| LL4 | Labor Level 4 Worked Account |
| LL5 | Labor Level 5 Worked Account |
| LL6 | Labor Level 6 Worked Account |
| LL7 | Labor Level 7 Worked Account |
| PhoneNums | Phone Numbers |
| Emails | Emails |