Employee Trace Tool Reporting Installation Instructions

Requirements and Installation Instructions

This document provides an installation guide for the Employee Trace Tool for Workforce Central Customers.

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.

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Microsoft PowerBI

Download and install Microsoft PowerBI Desktop version on each desktop you want to run reports. The software is available from the Microsoft store. You can also access the download here: https://powerbi.microsoft.com/en-us/downloads/

Follow the installation instructions to install the software on each user's machine, as needed.

MicroStrategy Desktop

Download and install MicroStrategy Desktop on each desktop you want to run reports. The software is available from the MicroStrategy website. There is a short signup step. You can access the download here: https://www.microstrategy.com/us/get-started/desktop

Follow the installation instructions to install the software on each user's machine, as needed.

Excel

For existing Excel users, there is no additional software to install.

Desktop Tool Installation

The installation consists of several easy steps.

Download the Package

From the Kronos website for the Employee Trace tool, download the zip file and package.

Unzip the Files

Using your favorite unzip utility, unzip (uncompress) the files from the downloaded package, to their own folder. Copy the report template of your choice from the folder Employee_Trace_Reporting to the desktop (or other local location) for each person who will be reporting.

- Kronos Employee Trace.pbix – Microsoft Power BI report
- Kronos Employee_Trace.mstr – MicroStrategy Desktop report
- Kronos Employee_Trace.xlsx – Microsoft Excel Template

Resetting File Locations

The first time the template or report is used (for each user), it will likely be necessary to reset the file location for the CSV data file, to your specific file location. If you then save the report with this new file location, it should not be necessary to do it again, as long as new data files reside in the same place, with the same name.

See the Employee Trace Tool Operating Instructions for information on how to reset the file locations.

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