webTA 4.2.8 NFC Core Employee User Guide

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Introduction

This guide explains how to perform functions that are available to webTA users who are assigned the Employee role. These functions include adding work and leave time into timesheets, submitting leave or premium pay requests, viewing work schedules and running reports.

This guide does not cover common tasks such as logging in, changing your password, navigating the system, viewing messages or accessing online help. For procedures on these tasks, as well as an overview of the Timekeeping cycle, see *webTA 4.2 NFC Core Basics User Guide*.

The Employe main menu lists functions that are available to the Employee role. Depending on how webTA is implemented at your Agency, functions may vary.

> **IMPORTANT**! Kronos does not support the use of browser navigation buttons in webTA. If you use the web browser's Forward or Back button on the browser toolbar instead of on the webTA page, data may be lost or you may be logged out of webTA.

> **NOTE**: This user guide contains graphical representations (screen shots) of the generic webTA application. These illustrations are intended to provide guidance and may not exactly match the configuration that is implemented at your organization. All user names are fictional.

Timekeeping Cycle

webTA is configured to follow the standard Federal Government pay period schedule, which is based on a two-week pay period. As the next section explains, employees enter time in an hourly or time-in/time-out (TITO) format.

You should update and complete timesheets in a timely fashion so that they can be properly edited and submitted for payroll processing. For a description of the Timekeeping Cycle and tasks that are performed by employees, Timekeepers and Supervisors, see *webTA 4.2 NFC Core Basics User Guide*. For specific guidelines about your organization's timesheet editing and validation guidelines, see your HR Administrator.

Timesheets

You access your timesheet to perform tasks such as entering, editing, and validating time. Depending on your agency, you may associate transaction codes and accounts to time entries. In the case of accounts, time can be associated with such account items as projects, jobs, or variations in work-time such as telework.

Depending on the agency's requirements, you will use one of the following types of timesheets:

- Hourly Timesheet
- Time-In/Time-Out (TITO) Timesheet

Be sure to refer to the procedure that corresponds to the type of timesheet that you have access to. The following topics include sample screenshots so that you can easily distinguish between hourly and TITO timesheets. Each topic includes procedures on working with each type of timesheet.

Hourly timesheets

Hourly timesheets let you record the number of hours worked each day based on one or more combinations of transaction codes and accounts. The timesheet contains a separate row for each combination of transaction codes and accounts in the pay period.

Depending on how your timesheet has been set up, you may see default work time entries or blank rows when you open a new timesheet. Here is an example of an hourly timesheet that contains default work time entries.

> *NOTE: Depending on your agency's implementation of webTA, additional features such as the COP Event drop-down list, Labor Distribution tab, Case Tracking tab, and Telework tab may appear.*

About the layout:

The hourly timesheet includes the following features:

- The pay period drop-down list near the top of the timesheet contains a list of past, previous, current and future pay periods. Select a pay period from the list and then click **Select Pay Period** to view the timesheet for the selected pay period.

- The Timesheet Status bar in the upper right corner indicates whether the timesheet is unvalidated, validated, certified or has been sent for payroll processing.

- The timesheet contains two sections, a **work time** section and a **leave time** section. The work time section contains entries for work hours and the leave section contains entries for leave hours. Allocate work and leave hours to various transaction codes and accounts.

- The days that fall into the first week of the bi-weekly pay period display in columns within the left area of the workspace. The **WK1** column displays the total number of hours entered for the first week.

- The days that fall into the second week of the bi-weekly pay period display in columns within the right area of the workspace. The **WK2** column displays the total number of hours entered for the second week.

- The bi-weekly total displays in the **Total** column located at the end of the workspace.

- There are three rows with totals located beneath the dates. The total time worked displays in the **Work Time Total** row. Any leave and/or other time displays in the **Leave Time Total** row. The daily total displays in the **Daily Total** row.

- The **Action Remarks** field is available for typing workflow remarks by the employee, Timekeeper, Supervisor or another authorized role.

- The **Schedules**, **Totals**, **Remarks**, and **Leave Balances** tabs appear near the bottom of the timesheet. Click each tab to view related information.

- Depending on your agency, these additional features may be available on the timesheet:
  - COP Event drop-down list. The employee is a recipient of Continuation of Pay (COP).
  - Leave (donation) Event drop-down list. The employee is a voluntary leave donor.
  - Dollar Transactions section. Record dollar amounts associated with transaction codes and accounts authorized by the agency for this purpose.
  - Labor Distribution tab. Add activities, charge time to activities, and view totals associated with activities.
  - Case Tracking tab. Add cases, charge time to cases, and view totals associated with cases.
  - Telework. View details about your telework agreement.

Adding work and leave time in hourly timesheets

To enter durations of time in hourly timesheets, use the format hh:mm (hours and minutes separated by a colon), or hh.mm (hours and minutes separated by a decimal.) For example, type 3:30 (three hours and thirty minutes), or 3.5 (three and a half hours). The system automatically converts time entered in the hh.mm (decimal) format to hh:mm (colon) format.

Many organizations use rounding rules. Depending on your agency's pay rules, the system may round time entries up or down. By default, the system rounds to the nearest quarter hour.

> *IMPORTANT: Depending on your agency, you may add, edit or delete leave time in timesheets only under special circumstances. Be aware that manually editing leave or premium pay in timesheets*

can produce validation errors if the changes do not match the corresponding leave or premium pay requests.

To add work or leave time in hourly timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **plus sign** (+) under Work Time or Leave Time.

   A new row appears.

3. Accept the default transaction code or click the **transaction code link** to select a different one.

   The Transaction Code pop-up opens. Select the transaction code from the drop-down list and then click **Select Work Time Transaction** or **Leave Time Transaction**. The pop-up is removed and the transaction code is filled in.

4. Accept the default account or click the **account link** to select a different one.

   The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

5. Press the **Tab** key to move the cursor to the appropriate cell and type the duration using the format **HH:mm** (hours and minutes, separated by a colon.) For example, type 7.5 for seven hours and thirty minutes.

6. Optionally, to record dollar transactions, click the **plus sign** (+) under the Dollar Transactions section. A new row appears. Specify the transaction code and account, and type the dollar amount using the format dollars and cents, separated by a decimal. For example, type 62.73.

7. Optionally, to record activities on the Labor Distribution tab, see "Working with activities in timesheets."

8. Optionally, to record cases on the Case Tracking tab, see "Working with cases in timesheets."

9. Click **Save** and then click **Cancel** to go back to the main menu.

Editing work and leave time in timesheets

Make the following types of edits to work or leave time in an hourly timesheet:

- *Change a specific duration*. For example, you might change 8:00 to 6:00 in the cell for Monday. The transaction code and account remain the same. In this case, simply use the **Backspace** key to clear the current entry and type in the new entry.

- *Change the transaction code or attributes associated with an entire row.* For example, you might change the transaction code from Regular Time to On the Job Training for an entire row. In this case, select the transaction code, account or other attribute from the appropriate drop-down list.

To edit worked time in an hourly timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. To edit existing time entries, click the cursor in the field that you want to edit and press the **Backspace** key to delete the existing hours. Type the new hours and then click **Save**.

3. To select a different transaction code, click the **transaction code link**. The Transaction Code pop-up opens. Select a transaction code from the drop-down list and then click **Select Work Time**

Transaction or **Leave Time Transaction**. The pop-up is removed and the transaction code is filled in.

4. Accept the default account or click the **account link** to select a different one.

    The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

5. Optionally, to edit activities on the Labor Distribution tab, see "Working with activities in timesheets."

6. Optionally, to edit cases on the Case Tracking tab, see "Working with cases in timesheets."

7. Click **Save** and then click **Cancel** to go back to the main menu.

Deleting time entries in timesheets

Make the following types of deletions in timesheets:

-   Delete a time entry. For example, you might delete a value from the cell for Monday. In this case, simply use the **Backspace** key to clear the current entry.
-   *Delete an entire row.* For example, you might want to delete all entries for an entire row. In this case, click the "**X**" at the beginning of the transaction row.
-   *Delete all entries in the timesheet.* Click **Remove All Entries**. All entries are removed from the timesheet.
-   *Delete the timesheet and the timesheet profile.* Click **Delete Timesheet**. All entries are removed from the timesheet and the current timesheet profile is replaced with data from the previous pay period.

To delete time entries in timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu..

    The timesheet opens.

    IMPORTANT! Deleted information cannot be restored; once deleted, data must be re-entered.

2. To delete a time entry, insert the cursor in the cell that contains the value and press the **Backspace** key. You can type a new entry. When you are done, click **Save**.

3. To delete a row, click the "**X**" at the beginning of the transaction row.

    The row is removed.

4. To delete all transactions on a timesheet (including Remarks, Labor Distribution, and Case Tracking), click **Remove All Entries**. Click **Yes** to respond to the confirmation message.

    webTA removes all rows from the timesheet and tabs.

5. To delete the timesheet and the associated timesheet profile, click **Delete Timesheet.** Click **Yes** to respond to the confirmation message. All entries are removed from the timesheet and the current timesheet profile is replaced with data from the previous pay period.

6. Click **Save** and then click **Cancel** to go back to the main menu.

TITO Timesheets

TITO timesheets allow you to enter a start time and a stop time for worked hours (for example, 9 a.m. to 5:00 p.m. Regular Time) or leave hours (for example, 9 a.m. to 5:00 p.m. Annual Leave.) The timesheet contains a separate row for each day in the pay period.

Adding work and leave time in TITO timesheets

To enter time in TITO timesheets, use the format hh:mm (hours and minutes separated by a colon) in Standard or Military time. For example, type 2:00a (2:00am) or 1400 (2:00pm).

Many organizations use rounding rules. Depending on your agency's pay rules, the system may round time entries up or down. By default, the system rounds to the nearest quarter hour.

> **IMPORTANT**: Your agency may have specific policies and procedures that determine how you work with leave time in your timesheet. If your agency has implemented the webTA Leave Request functionality, you may add, edit or delete leave time in your timesheet only under special circumstances. Check with your HR Administrator or your agency's leave policy if you have questions about working with leave time in your timesheet.

To add work and leave time in TITO timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu.

    The timesheet opens.

2. If you want to enter the same data on multiple days, see "Using Quick Time Entry" below.

    - OR -

    If you want to enter unique data for a specific day, continue to the next step.

    ***NOTE**: To enter multiple entries on the same day, click the **plus sign** (+) under Week 1 or Week 2. A new row is added.*

3. Click the **plus sign** (+) under Week 1 or Week 2 to add a time entry to that day.

    The Transaction Code pop-up opens.

4. Select a **transaction code** from the Work Time or Leave Time drop-down list and then click **Select Work Time Transaction** or **Leave Time Transaction**.

    The pop-up is removed and the transaction code is filled in.

5. Accept the default account or click the **account link** to select a different one.

    The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

6. Click the cursor in the **Time In** field. Type the start time using the format **HH:mm** (hour and minutes, separated by a colon). For example, enter 8:30. webTA auto-populates a.m. If work hours are not standard, it may be necessary to type p.m. to correct the entry.

7. Press the **Tab** key to move the cursor to the **Time Out** field, then type the stop time using the format **HH:mm (**hour and minutes, separated by a colon). For example, enter 5:15. webTA auto-populates p.m. If work hours are not standard, it may be necessary to type a.m. to correct the entry.

8. Press the **Tab** key to move the cursor to the **Meal Time** field. Type the duration, such as 00:45 minutes. Use the format **HH:mm** (hours and minutes, separated by a colon.) For example, enter 00:30 for a thirty minute meal break.

9. Optionally, to record dollar transactions, click the **plus sign** (+) under the Dollar Transactions section. A new row appears. Specify the transaction code and account, and type the dollar amount using the format dollars and cents, separated by a decimal. For example, type 62.73.

10. Optionally, to record activities on the Labor Distribution tab, see "Working with activities in timesheets."

11. Optionally, to record cases on the Case Tracking tab, see "Working with cases in timesheets."

12. Click **Save** and then click **Cancel** to go back to the main menu.

Using Quick Time Entry

The Quick Time Entry feature lets you select several days and then copy and paste the same data for each day. To use Quick Time Entry, take these steps:

1. If you haven't already done so, open the timesheet.

2. Click the **check box(es)** under Select Days.

3. Type the **Time In**, the **Time Out,** and the **meal duration**.

4. Click the **transaction code link** to select a transaction code.

   The Transaction Code pop-up opens. Select a **transaction code** from the Work Time or Leave Time drop-down list and then click **Select Work Time Transaction** or **Leave Time Transaction**. The pop-up is removed and the transaction code is filled in.

5. Click **Select Account** to select an account.

   The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

6. Click the **plus sign** (+) at the end of the row to populate the tmesheet with the quick time entry data.

7. Click **Save** and then click **Cancel** to go back to the main menu.

Editing work and leave time in TITO timesheets

To edit work and leave time in TITO timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. To edit existing time entries, click the cursor in the field that you want to edit and press the **Backspace** key to delete the existing hours. Type the new hours and then click **Save**.

3. To select a different transaction code, click the **transaction code link**. The Transaction Code pop-up opens. Select a **transaction code** from the Work Time or Leave Time drop-down list and then click **Select Work Time Transaction** or **Leave Time Transaction**. The pop-up is removed and the transaction code is filled in.

4. Accept the default account or click the **account link** to select a different one.

   The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

5. Optionally, to edit activities on the Labor Distribution tab, see "Working with activities in timesheets."

6. Optionally, to edit cases on the Case Tracking tab, see "Working with cases in timesheets."

7. Click **Save** and then click **Cancel** to go back to the main menu.

Deleting time entries in timesheets

Make the following types of deletions in timesheets:

- Delete a time entry. For example, you might delete a value from the cell for Monday. In this case, simply use the **Backspace** key to clear the current entry.

- *Delete an entire row.* For example, you might want to delete all entries for an entire row. In this case, click the "**X**" at the beginning of the transaction row.

- *Delete all entries in the timesheet*. Click **Remove All Entries**. All entries are removed from the timesheet.

- *Delete the timesheet and the timesheet profile.* Click **Delete Timesheet**. All entries are removed from the timesheet and the current timesheet profile is replaced with data from the previous pay period.

To delete time entries in timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu..

   The timesheet opens.

   IMPORTANT! Deleted information cannot be restored; once deleted, data must be re-entered.

2. <u>To delete a time entry</u>, insert the cursor in the cell that contains the value and press the **Backspace** key. You can type a new entry. When you are done, click **Save**.

3. <u>To delete a row</u>, click the "**X**" at the beginning of the transaction row.

   The row is removed.

4. <u>To delete all transactions on a timesheet</u> (including Remarks, Labor Distribution, and Case Tracking), click **Remove All Entries**. Click **Yes** to respond to the confirmation message.

   webTA removes all rows from the timesheet and tabs.

5. <u>To delete the timesheet and the associated timesheet profile</u>, click **Delete Timesheet.** Click **Yes** to respond to the confirmation message. All entries are removed from the timesheet and the current timesheet profile is replaced with data from the previous pay period.

6. Click **Save** and then click **Cancel** to go back to the main menu.

Timesheet Remarks

Two types of remarks may be entered in timesheets: pay period remarks or daily remarks. A pay period remark might apply to several days or the entire pay period. A daily remark may be attached to a specific time entry.

Adding a pay period remark

To add a pay period remark to a timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The Timesheet page opens.

2. Click the **Remarks** tab near the bottom of the timesheet.

   The tab opens.

3. Place the cursor in the **Pay Period Remarks** field and type the text.

4. Click **Save**.

Adding a daily remark

To add a daily remark to a specific time entry, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The Timesheet page opens.

2. Click the cursor on the time entry to which you want to add the remark.

3. Double-click or press **Shift-R**. The Remarks tab near the bottom of the timesheet opens and a new row appears. The row populates with the date of the time entry (for example, Fri 7/19), the type of entry (for example, 01 - Regular Time), the user name, user ID, the current date and time, and the user's role.

-OR-

Click the **Remarks** tab near the bottom of the timesheet. The tab opens. Click the plus sign (+) under the Add column. A new row appears. The row populates with the user name, user ID, the current date and time, and the user's role. Select the date from the Date drop-down list.

4. Type the text in the **Remarks** field.

5. Click **Save**.

A red triangle appears in the upper right corner of the time entry cell to indicate that a remark has been added.

Deleting remarks from timesheets

To delete remarks from timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu.

The timesheet opens.

2. Click the **Remarks** tab near the bottom of the timesheet.

The tab opens.

3. Click the cursor in the field under Pay Period Remarks and use the Backspace key to delete the text.

-OR-

Click the "**X**" on the row that identifies the daily remark that you want to delete. The row is deleted.

4. Click **Save**.

About validating timesheets

Once the timesheet has been completed, you or your Timekeeper must initiate the validation process.

The validation feature checks the timesheet against a set of business rules which are derived from Title 5, Tile 38, and OPM regulations as well as logical and computational rules (for example, the total number of hours entered for a day cannot exceed 24, and start and stop times cannot be the same).

Validating timesheets

To validate your timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

The timesheet opens.

2. Click **Validate** located at the bottom of the timesheet.

A message confirms that the validation was successful. Click **Cancel** to go back to the main menu.

- OR -

If webTA encounters validation problems, Validation Messages are displayed above the timesheet. Two types of messages may appear: Errors or Warnings.

Errors are displayed when webTA cannot validate timesheets because it violates one or more validation rules. Errors are indicated by the word "ERROR," followed by a brief description of the problem.

***IMPORTANT**! Errors must be corrected before successfully validating the timesheet.*

Warnings are displayed when webTA identifies data that may be a problem. However, the problem will not be severe enough to delay routing the timesheet to the Supervisor for certification.

3. Correct the validation errors by updating the timesheet based on the validation message, and then repeat Step 2. If you need assistance, contact your Timekeeper.

About the Timesheet Summary

Every timesheet has a corresponding Timesheet Summary that provides, by pay period, a read-only snapshot of the following types of information:

- Validation messages
- Timesheet entries and totals
- Dollar transactions (if applicable)
- Work schedule
- Totals, including Weekly, Total Hours, Time in Pay, Other Time, Dollar Transactions, and Days in Pay. Depending on licensing, totals for Labor Distribution and Case Tracking may also be listed.
- Remarks, including pay period remarks and daily remarks
- Leave requests and status
- Premium pay requests and status
- Leave data
- Timesheet profile data
- Labor distribution data (if license is enabled)
- Case tracking data (if license is enabled)
- Continuation of pay data (if license is enabled)
- Activity log of actions taken by all roles, including the type of action (for example, Save), the resulting state (for example, Timesheet Saved), the date and time, the user's name, and the message that the user entered in the Action Remarks field in the timesheet.

A sample Timesheet Summary is shown below:

Timesheet Summary

Unvalidated Validated Certified Sent

Employee: Rodriguez, Toni	**Timesheet Type:** Regular
Pay Period: 23 - 2014 : Nov 16, 2014-Nov 29, 2014 * VE [Select Pay Period]	**Status:** Validated

Hourly Timesheet

Transaction	Account	Sun 11/16	Mon 11/17	Tue 11/18	Wed 11/19	Thu 11/20	Fri 11/21	Sat 11/22	Wk1	Sun 11/23	Mon 11/24	Tue 11/25	Wed 11/26	Thu 11/27	Fri 11/28	Sat 11/29	Wk2	Total
Work Time																		
01 - Regular Base Pay	A1000		8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00		8:00		32:00	72:00
Work Time Total			8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00		8:00		32:00	72:00
Leave Time																		
66 - Other Leave-Federal Holiday	LV000													8:00			8:00	8:00
Leave Time Total														8:00			8:00	8:00
Daily Total			8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00	8:00	8:00		40:00	80:00
Dollar Transactions																		
Daily Total																		

Work Schedule

Schedule Week 1								Schedule Week 2						
Su 11/16	M 11/17	T 11/18	W 11/19	Th 11/20	F 11/21	Sa 11/22		Su 11/23	M 11/24	T 11/25	W 11/26	Th 11/27	F 11/28	Sa 11/29
	8:00	8:00	8:00	8:00	8:00				8:00	8:00	8:00	8:00	8:00	
	8:00	8:00	8:00	8:00	8:00				8:00	8:00	8:00	8:00	8:00	

Totals

Timesheet Totals

Week One:	40:00
Week Two:	40:00
Total Hours:	80:00
Time In Pay:	80:00
Other Time:	0:00
Dollar Transactions:	$0.00
Days In Pay:	10

Transaction Totals

Transaction Code	Amount
01 - Regular Base Pay	72:00
66 - Other Leave-Federal Holiday	8:00

Remarks

Pay Period Remarks

Pay Period Remarks

Timesheet Entry Remarks

Date	Entry	Name, UserID, Date/Time	Role	Daily Remark

Leave Requests

Date	Times	Hours	Transaction	Status	Approver
Fri 11/28	7:00am - 3:00pm	8:00	Annual Leave	Pending	cfryman

Premium Pay Requests

Date	Times	Hours	Transaction	Status	Approver
No premium pay requests found for this pay period					

Leave Data

Leave Type	Forward	Adj Forward	Accrued	Used	Adjustments	Expired	Capped	Balance	EOY Balance	Use or Lose
Annual Leave	64:00	64:00	4:00	0:00	0:00	0:00	0:00	68:00	80:00	0:00
Sick Leave	64:00	64:00	4:00	0:00	0:00	0:00	0:00	68:00	80:00	0:00
Other Leave	0:00	0:00	0:00	8:00	0:00	0:00	0:00	8:00	8:00	0:00

Timesheet Profile

Status Change Type: None	**Leave Ceiling Override:**
Status Change Day: None	**Home Leave Computation Date:**
Oath of Office: F	**Home Leave Category:** None
Final Report: False	**Home Leave End Date:**
On Hold: F	**Agency:** NFCEXAMPLE
Payplan: GS General Schedule	**State Code:** Maryland
Tour of duty: Full Time	**Town:** 1111
Duty Hours: 80	**Unit:** 11
Work Week: 40	**New Contact Point:** F
Alternative Work Schedule: Regular 8-hour Days	**Timekeeper:** 11
RSO / Salary Cap: None	**Account :**
Standby Hours Week 1:	**Accounting Type:** Manual Account Entry
Standby Hours Week 2:	**Personal Leave Ceiling:** 240:00
Standby AUO Percent:	**Actual Leave Accrual Rate:** 4 Hours/PP
Service Computation Date: 04/06/2014	**Vol. Leave Recipient:** No
Leave Category Override: Default (Based on SCD)	**Eme. Leave Recipient:** No

Activity Log

Action	Resulting State	Date	Name	Message
Validate	Validated by Employee	11/19/2014 01:34 PM EST	Rodriguez, Toni	
Save	Timesheet Saved	11/19/2014 12:03 PM EST	Rodriguez, Toni	
Save	Timesheet Saved	11/19/2014 10:17 AM EST	SYSTEM	

[Printable Version] [Cancel]

Opening and printing Timesheet Summaries

To open and print your Timesheet Summary, take these steps:

1. Click **Timesheet Summary** on the main menu.

    The Timesheet Summary page opens.

2. Accept the default pay period and go to the next step.

    - OR -

    Select a different pay period from the Pay Period drop-down list and click **Select Pay Period**.

    The Timesheet Summary page for the selected pay period opens.

3. Click **Printable Version** at the bottom of the page.

    A window opens with the printable version of the timesheet summary.

4. Click **Print** and then click **Cancel** to go back to the previous page.

About Processed Timesheets

Use the Processed Timesheets option to view a list of processed timesheets (also referred to as certified timesheet summaries.) The Processed Timesheets page is shown below.

Viewing processed timesheets

To view a list of processed timesheets, take these steps:

1. Click **Processed Timesheets** from the main menu.

    The Processed Timesheets page opens.

2. Optionally, click the Year drop-down list to specify the year, and then click **Select Year**.

3. Click the **Pay Period link** on the row that identifies the processed timesheet you want to view.

    The Timesheet Summary page opens.

4. Click **Cancel** to return to the previous page.

Schedules

Depending on your agency's implementation of webTA, you may be able to add and maintain a default schedule that displays the transaction code and account to which hours are charged, and a bi-weekly schedule of work hours. Entries from the default schedule are displayed on the Schedule tab near the bottom of your timesheet; entries may also be populated in the timesheet cells, depending on how timesheets are configured at your agency. If the Employee main menu lists "Default Schedules" as an option under the Time section, you have a default schedule.

If your agency has implemented Advanced Schedules, additional features such as Regular Days Off, temporary schedules, additional pay period options, and a Supervisor approval process may be in place. Timekeepers maintain and submit advanced schedules on behalf of their employees; Supervisors approve or deny schedule requests. If the Employee main menu lists "Schedules" as an option under the Time section, you have an advanced schedule.

About default schedules

Employees may have the ability to add and maintain their own default schedule, or Timekeepers may perform these tasks on behalf of their employees. A sample default schedule for an employee with an hourly timesheet is shown below.

A sample default schedule for an employee with a TITO timesheet is shown below:

Default Schedule

Employee: Evans, Art

Quick Time Entry

Select Days	Time In	Time Out	Meal	Transaction	Account	
S M T W T F S S M T W T F S ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐				Select Transaction	Select Account	+ Clear

Week 1

		Date	Transaction	Account	Time In	Time Out	Meal	Shift Total	Daily Total
	+	Sun							
X	+	Mon	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
X	+	Tue	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
X	+	Wed	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
X	+	Thu	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
X	+	Fri	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
	+	Sat							
								Week 1 Total	40:00
								Pay Period Total	80:00

Week 2

		Date	Transaction	Account	Time In	Time Out	Meal	Shift Total	Daily Total
	+	Sun							
X	+	Mon	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
X	+	Tue	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
X	+	Wed	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
X	+	Thu	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
X	+	Fri	01 - Regular Time	Select Account	7:30am	4:00pm	0:30	8:00	8:00
	+	Sat							
								Week 2 Total	40:00
								Pay Period Total	80:00

Action Remarks:

Characters Remaining: 255

| Save | Remove All Entries | Cancel |

Adding default schedules

To add your default schedule for an hourly timesheet, take these steps:

1. Click **Default Schedule** on the Employee main menu.

   The Default Schedule page opens.

2. Click the **plus sign** (+) under Work Time.

   A new row appears.

3. Accept the default transaction code or click the **transaction code link** to select a different one.

   The Transaction Code popup opens. Select the transaction code from the drop-down list and then click **Select Work Time Transaction**.

   The pop-up is removed and the transaction code is filled in.

4. Optionally, specify the account.

5. Press the **Tab** key to move the cursor to the appropriate cell and type the duration using the format HH:mm (hours and minutes, separated by a colon.) For example, type 7.5 for seven hours and thirty minutes. Complete the schedule by entering the duration for each day.

6. Click **Save** to save the default schedule.

7. Click **Cancel** to go back to the previous page.

NOTE: The default schedule populates new timesheets. If a timesheet has already been created for the pay period and you want it to be populated by the default schedule, delete the timesheet and then reopen it.

To add your default schedule for a TITO timesheet, take these steps:

1. Click **Default Schedule** on the Employee main menu.

   The Default Schedule page opens.

2. If you want to enter the same data on multiple days, see "Using Quick Time Entry."

   - OR -

   If you want to enter unique data for a specific day, continue to the next step.

   NOTE: To enter multiple entries on the same day, click the plus sign (+) under Week 1 or Week 2. A new row is added.

3. Click the **plus sign** (+) under Week 1 or Week 2 to add a time entry to that day.

   The Transaction Code pop-up opens.

4. Select a **transaction code** from the Work Time drop-down list and then click **Select Work Time Transaction**.

   The pop-up is removed and the transaction code is filled in.

5. Click **Select** next to Select Account and specify the account, if any.

6. Click the cursor in the **Time In f**ield. Type the start time using the format HH:mm (hour and minutes, separated by a colon). For example, enter 8:30. webTA auto-populates a.m. If work hours are not standard, it may be necessary to type p.m. to correct the entry

7. Press the **Tab** key to move the cursor to the **Time Out** field, then type the stop time using the format HH:mm (hour and minutes, separated by a colon). For example, enter 5:15. webTA auto-populates p.m. If work hours are not standard, it may be necessary to type a.m. to correct the entry.

8. Press the **Tab** key to move the cursor to the Meal Time field. Type the duration, such as 00:45 minutes. Use the format HH:mm (hours and minutes, separated by a colon.) For example, enter 00:30 for a thirty minute meal break.

9. Click **Save** to save the default schedule.

10. Click **Cancel** to go back to the previous page.

    NOTE: The default schedule populates new timesheets. If a timesheet has already been created for the pay period and you want it to be populated by the default schedule, delete the timesheet and then reopen it.

Using Quick Time Entry

The Quick Time Entry feature lets you select several days and then copy and paste the same data for each day. Use this feature with TITO timesheets. To use Quick Time Entry, take these steps:

1. If you haven't already done so, open the timesheet.

2. Click the check box(es) under **Select Days**.

3. Type the **Time In**, the **Time Out**, and the **meal duration**.

4. Click the **transaction code link** to select a transaction code.

The Transaction Code pop-up opens.

5. Select a transaction code from the Work Time or Leave Time drop-down list and then click **Select Work Time Transaction** or **Select Leave Time Transaction**.

   The pop-up is cleared and the transaction code is filled in.

6. Accept the default account or click the **account link** to select a different one.

   The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

7. Click the **plus sign** (+) at the end of the row to populate the tmesheet with the quick time entry data.

8. Click **Save** to save the timesheet.

9. Click **Cancel** to go back to the main menu.

Editing default schedules

To edit your default schedule, take these steps:

1. Click **Default Schedule** on the Employee main menu.

   The Default Schedule page opens.

2. To edit existing entries, click the cursor in the field that you want to edit and press the **Backspace** key to delete the existing hours. Type the new hours and then click **Save**.

3. To select a different transaction code, click the **transaction code link**. The Transaction Code pop-up opens. Select a transaction code from the drop-down list and then click **Select Work Time Transaction**. The pop-up is removed and the transaction code is filled in.

4. Accept the default account or click the **account link** to select a different one.

   The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

5. Click **Save** to save the default schedule.

6. Click **Cancel** to go back to the previous page.

Deleting default schedules

To delete your default schedule, take these steps:

1. Click **Default Schedule** on the Employee main menu.

   The Default Schedule page opens.

   IMPORTANT! Deleted information cannot be restored; once deleted, data must be re-entered.

2. To delete a time entry, insert the cursor in the cell that contains the value and press the **Backspace** key. You can type a new entry. When you are done, click **Save**.

3. To delete a row, click the "**X**" at the beginning of the transaction row.

   The row is removed.

4. To delete all entries, click **Remove All Entries**. Click **Yes** to respond to the confirmation message.

   webTA removes all rows from the default schedule.

5. Click **Save** to save changes.

6. Click **Cancel** to go back to the previous page.

About advanced schedules

Employees may view the advanced schedule added by their Timekeeper and approved by their Supervisor. A sample advanced schedule for an employee is shown below:

Viewing your advanced schedule

To view your schedule, take these steps:

1. Click **Schedule** on the Employee main menu.

   The Schedule page opens:

   NOTE: *If a schedule does not appear, contact your Timekeeper for assistance.*

2. Click **Cancel** to go back to the main menu.

Leave Requests

The leave request form is based on the OPM-71 (formally SF-71) Request for Leave or Approved Absence form. Employees use the Leave Request function to create and submit leave requests, track the status of leave requests, and view historical leave requests. Depending on whether your Agency implements the Intermediate Approver feature, employees may also have the ability to perform tasks as Intermediate Approvers.

About leave request workflows

A typical leave request process may have the following workflow:

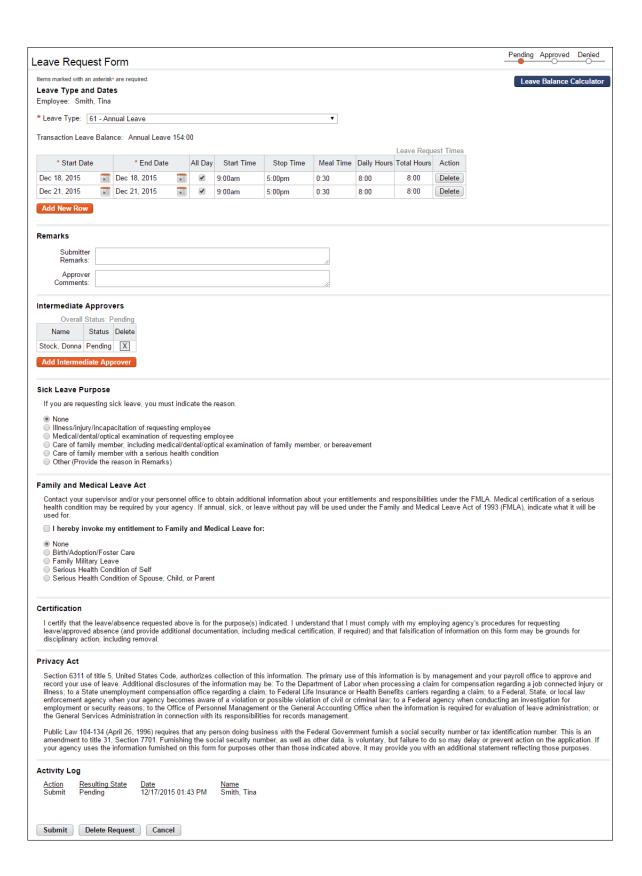- The employee (or the employee's Timekeeper) creates and submits a leave request. The system notifies the employee's Supervisor.
- If the Supervisor denies the request, the workflow ends. The system notifies the employee.
- If the Supervisor approves the request, the hours are automatically populated in the employee's timesheet. The system notifies the employee.

Some agencies use intermediate approvers. This adds another tier to the approval process. Depending on how your agency implements the Intermediate Approver feature, the workflow may vary. The overall process is described below.

- The employee adds and submits a leave request that includes one or more intermediate approvers. The system notifies the intermediate approver and the Supervisor.
  - If a default intermediate approver is specified on the employee's timesheet details page, the name of the default intermediate approver appears on the request form.
  - If the request form includes the Add Intermediate Approver button, the employee may select an intermediate approver. (NOTE: As long as the intermediate approver has not responded to the request, the employee may delete the intermediate approver and add a different one.)
- Whether the intermediate approver approves or denies the request, the system routes the request to the Supervisor. The system notifies the Supervisor and the employee.
- The Supervisor's approval or denial takes precedence over the intermediate approver's response.
  - If the Supervisor denies the request, the workflow ends. The system notifies the employee and the intermediate approver.
  - If the Supervisor approves the request, the hours populate the employee's timesheet. The system notifies the employee and the intermediate approver.
  - If the Supervisor reverts an approved request, the system removes the hours from the employee's timesheet and notifies the employee and intermediate approver.

A sample leave request with the Intermediate Approver feature is shown below:

Leave Request Form

Items marked with an asterisk* are required.

Leave Type and Dates

Employee: Smith, Tina

Leave Balance Calculator

* Leave Type: | 61 - Annual Leave ▼ |

Transaction Leave Balance: Annual Leave 154:00

Leave Request Times

* Start Date	* End Date	All Day	Start Time	Stop Time	Meal Time	Daily Hours	Total Hours	Action
Dec 18, 2015	Dec 18, 2015	☑	9:00am	5:00pm	0:30	8:00	8:00	Delete
Dec 21, 2015	Dec 21, 2015	☑	9:00am	5:00pm	0:30	8:00	8:00	Delete

Add New Row

Remarks

Submitter Remarks: [   ]

Approver Comments: [   ]

Intermediate Approvers

Overall Status: Pending

Name	Status	Delete
Stock, Donna	Pending	X

Add Intermediate Approver

Sick Leave Purpose

If you are requesting sick leave, you must indicate the reason.

○ None
○ Illness/injury/incapacitation of requesting employee
○ Medical/dental/optical examination of requesting employee
○ Care of family member, including medical/dental/optical examination of family member, or bereavement
○ Care of family member with a serious health condition
○ Other (Provide the reason in Remarks)

Family and Medical Leave Act

Contact your supervisor and/or your personnel office to obtain additional information about your entitlements and responsibilities under the FMLA. Medical certification of a serious health condition may be required by your agency. If annual, sick, or leave without pay will be used under the Family and Medical Leave Act of 1993 (FMLA), indicate what it will be used for.

☐ I hereby invoke my entitlement to Family and Medical Leave for:

○ None
○ Birth/Adoption/Foster Care
○ Family Military Leave
○ Serious Health Condition of Self
○ Serious Health Condition of Spouse, Child, or Parent

Certification

I certify that the leave/absence requested above is for the purpose(s) indicated. I understand that I must comply with my employing agency's procedures for requesting leave/approved absence (and provide additional documentation, including medical certification, if required) and that falsification of information on this form may be grounds for disciplinary action, including removal.

Privacy Act

Section 6311 of title 5, United States Code, authorizes collection of this information. The primary use of this information is by management and your payroll office to approve and record your use of leave. Additional disclosures of the information may be: To the Department of Labor when processing a claim for compensation regarding a job connected injury or illness; to a State unemployment compensation office regarding a claim; to Federal Life Insurance or Health Benefits carriers regarding a claim; to a Federal, State, or local law enforcement agency when your agency becomes aware of a violation or possible violation of civil or criminal law; to a Federal agency when conducting an investigation for employment or security reasons; to the Office of Personnel Management or the General Accounting Office when the information is required for evaluation of leave administration; or the General Services Administration in connection with its responsibilities for records management.

Public Law 104-134 (April 26, 1996) requires that any person doing business with the Federal Government furnish a social security number or tax identification number. This is an amendment to title 31, Section 7701. Furnishing the social security number, as well as other data, is voluntary, but failure to do so may delay or prevent action on the application. If your agency uses the information furnished on this form for purposes other than those indicated above, it may provide you with an additional statement reflecting those purposes.

Activity Log

Action	Resulting State	Date	Name
Submit	Pending	12/17/2015 01:43 PM	Smith, Tina

Submit   Delete Request   Cancel

Viewing your leave requests

To view your leave requests, take these steps:

1. Click **Leave Requests** on the Employee main menu.

   The Leave Requests - Current page opens. The Leave Requests table displays current and future requests.

2. Click the **leave request status link** to open a request.

   The Leave Request Form opens. Click **Cancel** to go back to the previous page.

   - OR -

   Click **History** to view historical leave requests. The Leave Requests - History page opens. The Leave Requests - History table displays historical requests. Click **Current** to return to the Leave Requests - Current page.

   - OR -

   Click **View Calendar** to see leave requests displayed in a calendar view.

   The Leave Calendar page opens. Click the month drop-down list to view a different month. Click the request link to open a specific request.

3. Click **Cancel** until you return to the Employee main menu.

Adding your leave requests

Leave requests must be submitted as soon as the request form is completed. Submitted requests are automatically sent to the appropriate users for approval.

To add and submit a leave request for yourself, take these steps:

> **NOTE**: *If the request is for FMLA or FMLA Military, please see the procedure "Adding FMLA leave requests."*

1. Click **Leave Requests** on the Employee main menu.

   The Leave Requests - Current page opens.

2. Click **Add Leave Request**.

   The Leave Request Form page opens.

3. Optionally, click **Leave Balance Calculator** in the upper right corner to view current or projected leave balances.

   The Leave Balance Calculator dialog opens. Click the **Leave Type** drop-down list to select the leave type, and then click the calendar icon to select a date. Click **Calculate** to see the estimated balance. When you have finished using the calculator, click the "X" in the upper right corner to return to the leave request.

4. Select the **leave type** from the Leave Type drop-down list located at the top of the page.

   The current leave balance appears below the drop-down list.

5. Click the **Start Date** calendar icon to select a start date or type the date in mm/dd/yy format; click the **End Date** calendar icon to select an end date or type the date in mm/dd/yy format.

6. Optionally, click the **All Day** check box to indicate that the leave spans the regularly scheduled shift. Depending on how your schedule is set up, some or all of the leave request times populate. (You may adjust the times as necessary.)

-OR-

Type the **Start Time** and **Stop Time** in hh:mm format. If applicable, type the **Meal Time** duration in hh:mm format. When you submit the request, the Daily Hours and Total Hours populate. If you included a Meal Time duration, the system deducts the meal from the Daily Hours.

-OR-

Type the **Daily Hours**. If applicable, type the **Meal Time** duration in hh:mm format. When you submit the request, the Start Time, Stop Time and Total Hours populate. If you included a Meal Time duration, the system deducts the meal from the Daily Hours.

7. To add another row for an additional entry that uses the same leave type, click **Add New Row** and repeat this step. To remove a row, click **Delete** on the row that you want to remove.

8. Type a remark in the Submitter Remarks text box, if necessary. (For example, if the Sick Leave Purpose is "Other," a submitter remark is required.)

9. If the Intermediate Approvers section includes the **Add Intermediate Approver** button, click the button. The Select User page opens. Click **Select** on the row that identifies the Intermediate Approver. You return to the request form, and the name populates the table.

10. If the leave type involves sick leave, specify a reason. Click to select a reason listed under the Sick Leave Purpose section of the form. If you click Other, type the accompanying reason in the Submitter Remarks text box.

11. If you are invoking FMLA, see the procedure "Adding FMLA leave requests."

12. When the form is complete, click **Submit** located at the bottom of the form.

   If the request is successful, a confirmation appears at the top of the form. The form is routed to the Intermediate Approver or Supervisor.

   If the request cannot be processed, an explanation appears at the top of the form; for example, a request may not be processed if the request will result in a negative balance. Select a different leave type or contact your Supervisor for assistance.

13. Click **Cancel** to return to the previous page.

Employees may update or delete pending requests. Once requests have been approved, further changes cannot be made unless the Supervisor reverts the request to pending.

Adding FMLA leave requests

Employees may use the leave request form to submit FMLA (or FMLA Medical) requests. Before you submit the request, take these steps:

- Contact your Supervisor and/or your Personnel Office to obtain additional information about your entitlements and responsibilities under the Family Medical Leave Act (FMLA). Medical certification of a serious health may be required by your agency.

- Ask your Supervisor which FMLA leave transaction code to select when you add the request.

   NOTE*: When you add an FMLA leave request, you must click the check box next to "I hereby invoke my entitlement to Family and Medial leave for ..." Do this only for the initial request. If you are requesting intermittent leave, do not click the check box for subsequent requests.*

When your Supervisor responds to the request, the system sends a notification to your Inbox. If the request is approved, you may review the Start Date and Expiration Date of the leave on the Employee Profile > FMLA/FMLA Military page. A sample screenshot is shown below.

FMLA/FMLA Military » Billings, Thomas

Settings
Licenses
Calendars
Locator Info
Agency Settings

• • • • • • • •

Roles
Timesheet Details
Timesheet Profile
FMLA/FMLA Military »

FMLA and FMLA Military

⬇ Leave Type	⬍ Start Date	⬍ Expiration Date
FMLA	November 30, 2015	November 29, 2016

1-1 of 1 Records |◄ ◄ 1 ► ►| View 25 50 100

To access the FMLA/FMLA Military page, take these steps:

1. Click **Settings** on the Utility menu.

   Your employee profile opens.

2. Click F**MLA/FMLA Military** from the sidebar menu.

   The page displays dates for past, current and future FMLA leave.

To add a request for FMLA (or FMLA Medical) leave, take these steps:

1. Click **Leave Requests** on the Employee main menu.

   The Leave Requests - Current page opens.

2. Click **Add Leave Request**.

   The leave request form opens.

3. Select the **leave type** from the Leave Type drop-down list located at the top of the page.

   NOTE: If you aren't sure which FMLA leave type to select, contact your Supervisor.

   The current leave balance appears below the drop-down list.

4. Click the **Start Date** calendar icon to select a start date or type the date in mm/dd/yy format; click the **End Date** calendar icon to select an end date or type the date in mm/dd/yy format.

5. Optionally, click the **All Day** check box to indicate that the leave spans the regularly scheduled shift. Depending on how your schedule is set up, some or all of the leave request times populate. (You may adjust the times as necessary.)

   -OR-

   Type the **Start Time** and **Stop Time** in hh:mm format. If applicable, type the **Meal Time** duration in hh:mm format. When you submit the request, the Daily Hours and Total Hours populate. If you included a Meal Time duration, the system deducts the meal from the Daily Hours.

   -OR-

   Type the **Daily Hours**. If applicable, type the **Meal Time** duration in hh:mm format. When you submit the request, the Start Time, Stop Time and Total Hours populate. If you included a Meal Time duration, the system deducts the meal from the Daily Hours.

6. To add another row for an additional entry that uses the same leave type, click **Add New Row** and repeat this step. To remove a row, click **Delete** on the row that you want to remove.

7. Optionally, type a remark in the Submitter Remarks text box.

8. If the **Add Intermediate Approver** button is displayed, click the button. The Select User page opens. Click **Select** on the row that identifies the intermediate approver. You return to the request form and the name populates the table.

9. Click to specify a reason listed under the Sick Leave Purpose section of the form. If you click **Other**, type the accompanying reason in the Submitter Remarks text box.

10. To invoke FMLA, click the check box next to "I hereby invoke my entitlement to Family and Medical Leave Act for" and then select one of the options below the check box:

   • Birth/Adoption/Foster Case
   • Family Military Leave
   • Serious Health Condition of Self
   • Serious Health Condition of Spouse, Child, or Parent

   NOTE: You invoke FMLA only once, on the inital FMLA leave request. It is not necessary to invoke FMLA again until the FMLA expiration date is reached in 12 months. The system sends messages to let you know in advance when the expiration date is approaching.

11. When the form is complete, click **Submit** located at the bottom of the form.

   If the request is successful, a confirmation appears at the top of the form. The form is routed to the Intermediate Approver or Supervisor.

   -OR-

   If you have already invoked an FMLA leave request and it has been approved, an alert appears:

   ALERT: FMLA (or FMLA Military) has already been invoked. To continue, clear the check box and complete the request.

   Clear the check box, complete the request, and then click **Submit**. The form is routed to the Intermediate Approver or Supervisor.

12. Click **Cancel** to go back to the Leave Requests - Current page.

Editing your leave requests

Requests that have been approved or denied cannot be edited. If a change needs to be made to a request that has already been approved or denied, contact your Supervisor. To edit a pending request, take these steps:

1. Click **Leave Requests** on the Employee main menu.

   The Leave Requests - Current page opens.

2. Click the **leave request status link** on the row that identifies the request you want to work with.

   The Leave Request Form page opens.

3. Make changes.

4. When the form is complete, click **Submit** located at the bottom of the form.

   If the request is successful, a confirmation message appears at the top of the form. The form is routed to the Intermediate Approver or Supervisor.

If the request cannot be processed, an explanation appears at the top of the form; for example, a request may not be processed if the request will result in a negative balance. Select a different leave type or contact your Supervisor for assistance.

5. Click **Cancel** to return to the previous page.

Deleting your leave request

Requests that have been approved or denied cannot be deleted. To delete a pending request, take these steps:

1. Click **Leave Requests** on the Employee main menu.

   The Leave Requests - Current page opens.

2. Click the **leave request status link** on the row that identifies the request you want to work with.

   The Leave Request Form page opens.

3. Click **Delete Request** at the bottom of the page.

   A confirmation message appears. Click **Yes** to proceed; the request is removed and you return to the previous page.

   - OR -

   Click **Cancel** to dismiss the action.

Approving and denying intermediate approver leave requests

Intermediate Approvers approve or deny employee leave requests. If you are an intermediate approver, the system sends notification messages to your Inbox when employees submit requests. Likewise, the system sends notificaiton messages to the employee and their Supervisor when you approve or deny a request.

The intermediate approver's action (Pending, Approved, or Denied) displays in the Activity Log at the bottom of the leave request form, and on the intermediate approver's Review Request page. Elsewhere in the system, the Supervisor's action displays. Intermediate approvers cannot revert a leave request to pending; this is limited to Supervisors.

 To respond to leave requests as an intermediate approver, take these steps:

1. Click **Review Leave Requests** from the Intermediate Approvals section on the Employee main menu.

    The Leave Requests - Current page opens.

2. Click the **leave request status link** on the row that identifies the request you want to work with.

   The Leave Request Form page opens.

3. To approve the request, click **Intermediate Approve** near the bottom of the page. A message confirms that the request has been updated. The system routes the request to the next approver.

   -OR-

   To deny the request, type the reason in the Approver Comments text box and then click **Update**. Click **Intermediate Deny**. A message confirms the action.

4. Click **Cancel** to go back to the previous page.

Premium Pay Requests

Employees use the Premium Pay Request function to create and submit premium pay requests, track the status of premium pay requests, and view historical premium pay requests. Depending on whether your Agency implements the Intermediate Approver feature, employees may also have the ability to perform tasks as Intermediate Approvers.
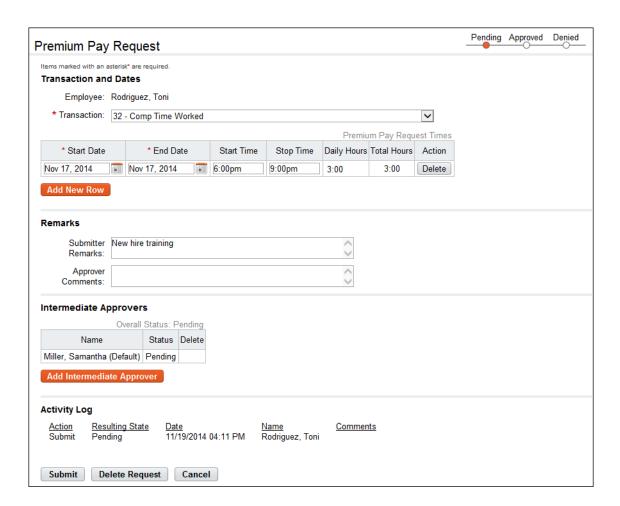
About premium pay request workflows

A typical premium pay request process may have the following workflow:

- The employee (or the employee's Timekeeper) creates and submits a premium pay request. The system notifies the employee's Supervisor.
- If the Supervisor denies the request, the workflow ends. The system notifies the employee.
- If the Supervisor approves the request, the hours are automatically populated in the employee's timesheet. The system notifies the employee.

Some agencies use intermediate approvers. This adds another tier to the approval process. Depending on how your agency implements the Intermediate Approver feature, the workflow may vary. The overall process is described below.

- The employee adds and submits a premium pay request that includes one or more intermediate approvers. The system notifies the intermediate approver and the Supervisor.
  - If a default intermediate approver is specified on the employee's timesheet details page, the name of the default intermediate approver appears on the request form.
  - If the request form includes the Add Intermediate Approver button, the employee may select an intermediate approver. (NOTE: As long as the intermediate approver has not responded to the request, the employee may delete the intermediate approver and add a different one.)
- Whether the intermediate approver approves or denies the request, the system routes the request to the Supervisor. The system notifies the Supervisor and the employee.
- The Supervisor's approval or denial takes precedence over the intermediate approver's response.
  - If the Supervisor denies the request, the workflow ends. The system notifies the employee and the intermediate approver.
  - If the Supervisor approves the request, the hours populate the employee's timesheet. The system notifies the employee and the intermediate approver.
  - If the Supervisor reverts an approved request, the system removes the hours from the employee's timesheet and notifies the employee and intermediate approver.

A sample premium pay request with the Intermediate Approver feature is shown below:

Viewing your premium pay requests

To view your premium pay requests, take these steps:

1. Click **Premium Pay Requests** on the Employee main menu.

    The Premium Pay Request page opens.

2. Click the **premium pay request link** on the row that identifies the request you want to view.

    The Premium Pay Request page opens. If the request has been approved or denied, a read-only copy of the request displays. If the request is pending, an editable version of the request displays.

3. Click **Cancel** to go back to the previous page.

Adding your premium pay request

To add premium pay requests, take these steps:

1. Click **Premium Pay Request** on the Employee main menu.

    The Premium Pay Requests page opens.

2. Click **Add Premium Pay Request**.

The Premium Pay Request page opens.

3. Select the premium pay type from the **Transaction** drop-down list.

   Once a premium pay type is selected, the current premium pay balance for that premium pay type displays below the drop-down list.

4. Click the **Start Date** and **End Date** icons to select the date range.

5. Optionally, type the **Start Time** in hh:mm format, and type the **Stop Time** in hh:mm format. When you submit the request, the Daily Hours and Total Hours populate.

   -OR-

   Type the **Daily Hours**. When you submit the request, the Start Time, Stop Time and Total Hours populate.

   NOTE: By default the Start Time is 12:00 am and the Stop Time varies according to the daily hours that you specified.

6. To add another row for an additional entry that uses the same premium pay type, click **Add New Row** and repeat the previous steps. To remove a row, click **Delete** on the row that you want to remove.

7. Type a remark in the **Submitter Remarks** text box, if necessary.

8. If the **Add Intermediate Approver** button is available, click the button. The Select User page opens. Click **Select** on the row that identifies the Intermediate Approver. You return to the request form, and the name populates the table.

9. When the form is complete, click **Submit**.

   The form is routed to the Intermediate Approver or Supervisor for approval.

10. Click **Cancel** to return to the previous page.

Editing your premium pay request

Employees may edit or delete pending premium pay requests. If a change needs to be made to a request that has already been approved or denied, contact your Supervisor. To edit a pending premium pay request, take these steps:

1. Click **Premium Pay Request** on the Employee main menu.

   The Premium Pay Requests page opens.

2. Click the **premium pay request link** on the row that identifies the request you want to edit.

   The Premium Pay Request page opens.

3. Make changes.

4. Click **Submit**.

   The form is routed to the Intermediate Approver or Supervisor.

5. Click **Cancel** to return to the previous page.

Deleting your premium pay request

Pending requests may be deleted. To delete a pending request, take these steps:

1. Click **Premium Pay Request** on the Employee main menu.

The Premium Pay Requests page opens.

2. Click the **premium pay request link** on the row that identifies the request you want to delete.

   The Premium Pay Request page opens.

3. Click **Delete Request** at the bottom of the page.

   A confirmation message appears. Click **Yes** to proceed; the request is removed and you return to the previous page.

   - OR -

   Click **Cancel** to dismiss the action.

Approving and denying intermediate approver premium pay requests

Intermediate Approvers approve or deny employee premium pay requests. If you are an intermediate approver, the system sends notification messages to your Inbox when employees submit requests. Likewise, the system sends notification messages to the employee and their Supervisor when you approve or deny a request.

The intermediate approver's action (Pending, Approved, or Denied) displays in the Activity Log at the bottom of the premium pay request form, and on the intermediate approver's Review Request page. Elsewhere in the system, the Supervisor's action displays. Intermediate approvers cannot revert a premium pay request to pending; this is limited to Supervisors.

To respond to premium pay requests as an intermediate approver, take these steps

1. Click **Review Premium Pay Requests** from the Intermediate Approvals section on the Employee main menu.

   The Premium Pay Requests - Current page opens.

2. Click the **premium pay request status link** on the row that identifies the request you want to work with.

   The Premium Pay Request Form page opens.

3. To approve the request, click **Intermediate Approve** near the bottom of the page. A message confirms that the request has been updated. The system routes the request to the next approver.

   -OR-

   To deny the request, type the reason in the Approver Comments text box and then click **Update**. Click **Intermediate Deny**. A message confirms the action.

4. Click **Cancel** to go back to the previous page.

Leave Donations

If a voluntary leave transfer program has been implemented at your agency, the Leave Donations section may appear on the Employee main menu. Depending on agency policy, employees may donate leave at any time if there is sufficient leave available, and the agency's limitations on donations has not been exceeded.

Leave donations must be approved by the HR Administrator before the donation can be used by the recipient. After an account is closed by the HR Administrator, webTA restores unused leave back to donors.

Adding your leave donations

To donate leave hours to a leave account, take these steps:

1. Click **Leave Donations** from the Leave Transfer Program section on the Employee main menu.

   The LTP Donations page opens.

2. Click **Add Donation**.

   The Add LTP Donation page opens.

3. Click **Search** next to the LTP Account field.

   The LTP Account Selection page opens.

4. Click **Select** on the row that identifies the account to which you want to make a donation.

   You return to the Add LTP Donation page and the LTP Account field is populated with the selection you made.

5. Enter your **Position**, **Grade** and **Step**.

6. Click **Search** next to the Leave Type field.

   The Leave Balances page opens.

7. Click the **leave type name link** that identifies the type of leave you want to donate.

   You return to the Add LTP Donation page and the Leave Type field is populated with the selection you made.

8. Enter the number of hours to donate in the **Amount** field.

9. Select the pay period from the **Pay Period** drop-down menu. This identifies the pay period from which the leave hours will be deducted. The pay period may be a current or future pay period (previous pay periods are not available to select from the drop-down list.)

10. Optionally, enter remarks.

11. Click **Save** and then click **Cancel** to go back to the previous page.

Editing your leave donations

Leave donations that have been submitted but not yet approved may be edited or deleted.

To edit a donation that you made to a leave account, take these steps:

1. Click **Leave Donations** from the Leave Transfer Program section on the Employee main menu.

   The LTP Donations page opens.

2. Click the **LTP account name link** that identifies the donation you want to edit.

    The Edit LTP Donation page opens.

3. Make changes.

4. Click **Save** and then click **Cancel** to go back to the previous page.

Deleting your leave donations

Leave donations that have been submitted but not yet approved may be edited or deleted.

To delete a donation that you made to a leave account, take these steps:

1. Click **Leave Donations** from the Leave Transfer Program section on the Employee main menu.

    The LTP Donations page opens.

2. Click the "**X**" on the row that identifies the donation to delete.

    A confirmation message appears.

3. Click **OK** to delete the donation.

    -OR-

    Click **Cancel** to dismiss the operation.

4. Click **Save** and then click **Cancel** to go back to the previous page.

webTA Add-on Modules

The following add-on modules may be implemented at your Agency:

- webTA Labor Distribution
- webTA Continuation of Pay
- webTA Case Tracking
- webTA Emergency Contacts Management
- webTA Telework

Please see the sections below for procedures.

webTA Labor Distribution

Agencies may implement the Labor Distribution module to track time and attendance data against labor distribution activity categories, activity sets and activities. If your timesheet includes the Labor Distribution tab, then you may be able to add, edit or delete activities.

The Labor Distribution tab is located near the bottom of the timesheet, as shown in the example below.

Working with activities in timesheets

To add activities to a timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **Labor Distribution tab** near the bottom of the timesheet.

   The Labor Distribution tab opens.

3. Click **Add Activity**.

   The Add Activity page opens.

4. Click the **check box** next to the activity you want to add to your timesheet.

   NOTE: In order for activities to appear on the Add Activity page, activities must be assigned to employees or organizations. If activities do not appear, contact your Supervisor for assistance.

5. Click **Save**.

The activity set is listed under the Activity column on the Labor Distribution tab.

6. Enter **activity hours** or **percentages** in the Labor Distribution cells.

7. Click **Save** to save the timesheet.

To edit activities in a timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **Labor Distribution tab** near the bottom of the timesheet.

   The Labor Distribution tab opens.

3. Edit **activity hours** or **percentages** in the Labor Distribution cells.

4. Click **Save** to save the timesheet.

To delete activities from a timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **Labor Distribution tab** near the bottom of the timesheet.

   The Labor Distribution tab opens.

3. Click the "**X**" under the Delete column on the row you want to remove.

   The row is deleted, including the hours or percentages entered for the activity.

webTA Continuation of Pay

Employees who are injured while engaged in official work activities or on work premises may be eligible for Continuation of Pay (COP). If the employee meets eligibility criteria, the COP Administrator creates a COP event in webTA. After the event is created, the employee may view event details from the COP Events option on the Employee main menu.

Viewing COP leave balances

COP leave is entered on the employee's timesheet by the employee or their Timekeeper. Using any COP leave on a given day is tracked in day increments on the employee's timesheet Leave Balances tab, and on the Timesheet Summary. If the employee uses one hour of COP leave on a given day, the employee (or Timekeeper) records the start and stop time in hour increments on the timesheet, but the Leave Balances tab tracks the leave as an entire day.

To view COP leave balances in timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu. The timesheet opens. Click the **Leave Balances tab** to view COP leave balances.

   -OR-

Click **Timesheet Summary** on the Employee main menu. The Timesheet Summary opens. Scroll down to the Leave Data section to view COP leave balances.

-OR-

Click **Leave Balances** on the Employee main menu. The Leave Balances page opens. View COP leave balances on the COP Occurrence row.

2. Click **Cancel** until you return to the main menu.

Adding COP leave time in hourly timesheets

To add COP leave time in hourly timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **plus sign** (+) under Leave Time.

   A new row appears.

3. Click the **transaction code link** to select a COP leave time transaction code.

   The Transaction Code pop-up opens.

4. Select the **transaction code** from the drop-down list and then click **Select Leave Time Transaction**.

   NOTE: COP leave transaction codes use the prefix "67", such as "67-OWCP Injury Leave" or "67 OWCP Injury Leave, Shift 1."

   The pop-up is removed and the transaction code is filled in.

5. Select the event from the **COP Event drop-down list**. The same employee may have multiple events; select the event to which the leave transaction code will be charged..

   NOTE: Any charge to a COP leave transaction code during a day constitutes the use of that day toward the 45-day limit.

6. Accept the default account or click the **account link** to select a different one.

   The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

7. Press the **Tab** key to move the cursor to the appropriate cell and type the duration using the format **HH:mm** (hours and minutes, separated by a colon.) For example, type 7.5 for seven hours and thirty minutes.

   NOTE: Any charge to a COP leave transaction code during a day constitutes the use of that day toward the 45-day limit.

8. Click **Save** and then click **Cancel** to go back to the main menu.

Adding COP leave time in TITO timesheets

To add COP leave time in TITO timesheets, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. If you want to enter the same data on multiple days, see "Using Quick Time Entry."

   - OR -

   If you want to enter unique data for a specific day, continue to the next step.

3. Click the **plus sign** (+) under Week 1 or Week 2 to add a COP leave time entry to that day.

   The Transaction Code pop-up opens.

4. Select the **transaction code** from the Leave Time drop-down list and then click **Select Leave Time Transaction**.

   NOTE: COP leave transaction codes use the prefix "67", such as "67-OWCP Injury Leave" or "67 OWCP Injury Leave, Shift 1."

   The pop-up is removed and the transaction code is filled in. The COP Event drop-down list appears directly beneath the COP leave transaction code.

5. Select the **event** from the COP Event drop-down list. The same employee may have multiple events; select the event to which the leave transaction code will be charged.

6. Accept the default account or click the **account link** to select a different one.

   The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

7. Click the cursor in the **Time In** field. Type the start time using the format **HH:mm** (hour and minutes, separated by a colon). For example, enter 8:30. webTA auto-populates a.m. If work hours are not standard, it may be necessary to type p.m. to correct the entry.

   NOTE: Any charge to a COP leave transaction code during a day constitutes the use of that day toward the 45-day limit.

8. Press the **Tab** key to move the cursor to the **Time Out** field, then type the stop time using the format **HH:mm** (hour and minutes, separated by a colon). For example, enter 5:15. webTA auto-populates p.m. If work hours are not standard, it may be necessary to type a.m. to correct the entry.

9. Click **Save** and then click **Cancel** to go back to the main menu.

Using Quick Time Entry

The Quick Time Entry feature lets you select several days and then copy and paste the same data for each day. To use Quick Time Entry, take these steps:

1. If you haven't already done so, open the timesheet.

2. Click the **check box(es)** under Select Days.

3. Type the **Time In**, the **Time Out,** and the **meal duration**.

4. Click the **transaction code link** to specify a COP leave transaction code.

   The Transaction Code pop-up opens.

5. Select the **transaction code** from the Leave Time drop-down list and then click **Select Leave Time Transaction**.

   NOTE: COP leave transaction codes use the prefix "67", such as "67-OWCP Injury Leave" or "67 OWCP Injury Leave, Shift 1."

6. Select the **event** from the COP Event drop-down list. The same employee may have multiple events; select the event to which the leave transaction code will be charged.

   NOTE: Any charge to a COP leave transaction code during a day constitutes the use of that day toward the 45-day limit.

7. Click **Select Account** to select an account.

   The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

8. Click the **plus sign** (+) at the end of the row to populate the timesheet with the quick time entry data.

9. Click **Save** and then click **Cancel** to go back to the main menu.

webTA Case Tracking

Agencies may implement the Case Tracking module to track time and attendance data against specific cases. If your timesheet includes the Case Tracking tab, then you may have the ability to add, edit or delete cases.

Working with cases in timesheets

To add cases to a timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **Case Tracking tab** near the bottom of the timesheet.

   The Case Tracking tab opens.

3. Click **Add Case**.

   The Select Cases page opens.

   NOTE: To view details about a case, click the case ID or case name link. The Edit Case page opens in read-only format. View details, and then click Cancel to return to the Select Cases page.

4. Click the **check box** next to the case you want to add to the timesheet.

   NOTE: In order for cases to appear on the Select Cases page, cases must be assigned to employees or organizations. If the case does not appear, contact the Supervisor or Case Tracking Administrator for assistance.

5. Click **Save**.

   The case is listed under the Case column on the Case Tracking tab.

To add case hours in a timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **Case Tracking tab** near the bottom of the timesheet.

   The Case Tracking tab opens.

3. Enter **case hours** in the Case Tracking cells.

4. Click **Save** to save the timesheet.

To edit case hours in a timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **Case Tracking tab** near the bottom of the timesheet.

   The Case Tracking tab opens.

3. Edit **case hours** in the Case Tracking cells.

4. Click **Save** to save the timesheet.

To delete case hours from a timesheet, take these steps:

1. Click **Timesheet** on the Employee main menu.

   The timesheet opens.

2. Click the **Case Tracking tab** near the bottom of the timesheet.

   The Case Tracking tab opens.

3. Click the "**X**" under the Delete column on the row you want to remove.

   The row is deleted, including the hours entered for the case.

webTA Emergency Contacts Management

If your agency has implemented the Emergency Contact Management module, the Emergency Contacts section may appear on the Employee main menu. Depending on agency policy, employees may be required to add a minimum number of emergency contacts and regularly maintain and update contact information.

Adding your emergency contacts

To add your contact information, take these steps:

1. Click **My Contacts** from the Emergency Contacts section on the main menu.

   The Emergency Contacts page opens. Your name is automatically populated by the system.

2. To complete your own information, click your **first name link** or **last name link**. The Emergency Contact Details page opens.

-OR-

To add new contacts, click **Add New**. The Emergency Contact Details page opens.

3. Complete the information and then click **Save**.

NOTE: *An asterisk indicates required fields.*

4. Click **Cancel** to go back to the previous page.

Editing your emergency contacts

To update your contact information, take these steps:

1. Click **My Contacts** from the Emergency Contacts section on the main menu.

   The Emergency Contacts page opens.

2. Click the **first name link** or **last name link** on the row that identifies the contact you want to work with.

   The Emergency Contact Details page opens.

3. Make changes and then click **Save**.

4. Click **Cancel** to go back to the previous page.

Deleting your emergency contacts

To delete contact information, take these steps:

1. Click **My Contacts** from the Emergency Contacts section on the main menu.

   The Emergency Contacts page opens.

2. Click the "**X**" under the Delete column on the row that identifies the contact you want to remove.

   The row is deleted.

3. Click **Cancel** to go back to the previous page.

Changing the call order

The Call Order determines the priority in which emergency contacts will be called.

To change the call order, take these steps:

1. Click **My Contacts** from the Emergency Contacts section on the main menu.

   The Emergency Contacts page opens.

2. Insert the cursor in the Call Order field on the row that you want to change and press the **Backspace** key to delete the number. Type in a different number.

   The list is adjusted.

3. Click **Save** and then click **Cancel** to go back to the previous page.

Viewing your emergency contacts

To view your contact information, take these steps:

1. Click **My Contacts** from the Emergency Contacts section on the main menu.

   The Emergency Contacts page opens.

2. Click the **first name link** or **last name link** on the row that identifies the contact information you want to view.

   The Emergency Contact Details page opens.

3. Click **Cancel** to go back to the previous page.

webTA Telework

If the webTA Telework module has been implemented at your agency, the Telework section may appear on the Employee main menu. This section explains how employees work with telework agreements and requests, and enter telework in timesheets and schedules.
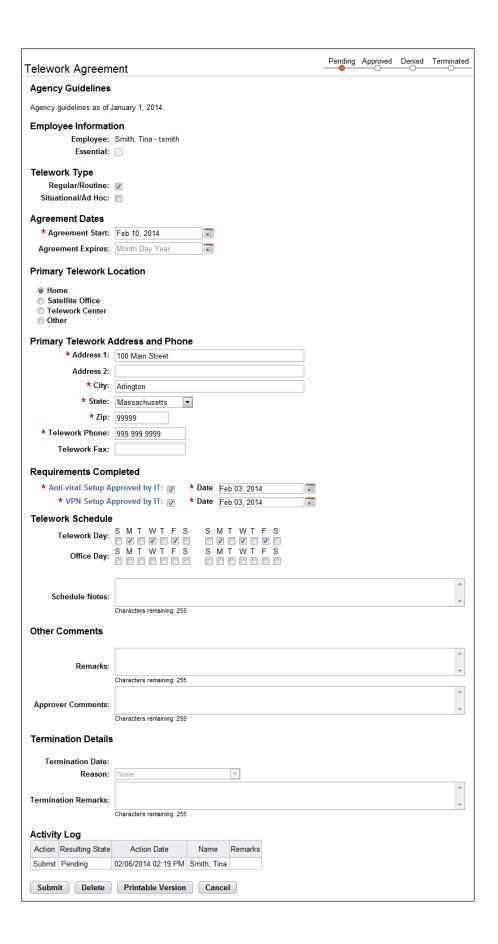
Employees who telework intermittently on an ad hoc basis may submit one-time telework requests. The request is routed to the Supervisor for approval, and, if approved, the hours may be populated in the employee's timesheet. Intermittent telework is referred to in webTA as situational telework. The employee's Timekeeper may submit telework requests on behalf of employees. The system sends workflow notifications to the employee, Timekeeper and Supervisor as the request is routed.

Employees who telework on a regular basis may be scheduled for telework using the default schedule or Advanced Scheduling. A request form is not required. Regularly occurring telework is referred to in webTA as regular or routine telework.

Whether employees use situational or routine telework features, all employee who participate in telework must submit a telework agreement for Supervisor approval. Approved agreement dates may impact workflow notifications, timesheet validations, validation error messages, and whether the employee is classified as "Ready" in the employee profile. (Employees with approved agreements are identified as "Ready." Job positions are identified as "eligible.")

About telework agreements

The Telework Agreements page lists pending, approved, denied and terminated agreements. A sample Telework Agreement page is shown below.

Telework Agreement

Agency Guidelines

Agency guidelines as of January 1, 2014.

Employee Information

Employee: Smith, Tina - tsmith
Essential: ☐

Telework Type

Regular/Routine: ☑
Situational/Ad Hoc: ☐

Agreement Dates

* Agreement Start: Feb 10, 2014
Agreement Expires: Month Day Year

Primary Telework Location

◉ Home
◯ Satellite Office
◯ Telework Center
◯ Other

Primary Telework Address and Phone

* Address 1: 100 Main Street
Address 2:
* City: Arlington
* State: Massachusetts
* Zip: 99999
* Telework Phone: 999 999 9999
Telework Fax:

Requirements Completed

* Anti-viral Setup Approved by IT: ☑   * Date Feb 03, 2014
* VPN Setup Approved by IT: ☑   * Date Feb 03, 2014

Telework Schedule

	S	M	T	W	T	F	S	S	M	T	W	T	F	S
Telework Day:	☐	☑	☐	☑	☐	☑	☐	☐	☑	☐	☑	☐	☑	☐
Office Day:	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Schedule Notes:
Characters remaining: 255

Other Comments

Remarks:
Characters remaining: 255

Approver Comments:
Characters remaining: 255

Termination Details

Termination Date:
Reason: None
Termination Remarks:
Characters remaining: 255

Activity Log

Action	Resulting State	Action Date	Name	Remarks
Submit	Pending	02/06/2014 02:19 PM	Smith, Tina	

[Submit] [Delete] [Printable Version] [Cancel]

Adding telework agreements

Employees and Supervisors may add and submit telework agreements.

To add and submit a telework agreement, take these steps:

1. Click **Telework Agreements** under the Telework section on the main menu.

   The Telework Agreements page opens.

2. Click **Add New Agreement**.

   The Telework Agreement page opens.

3. Complete the fields.

4. Click **Submit**.

   -OR-

   Click **Cancel** to dismiss changes and return to the previous page.

Deleting telework agreements

Employees and Supervisors may delete telework agreements. Telework agreements must be in pending status before they can be deleted. Supervisors may revert telework agreements to pending status.

Data from deleted telework agreements is removed from the webTA system.

To delete a telework agreement, take these steps:

1. Click **Telework Agreements** under the Telework section on the main menu.

   The Telework Agreements page opens.

2. Click the **telework agreement status link** on the row that identifies the agreement you want to delete.

   The Telework Agreement page opens.

3. Click **Delete**.

   A confirmation message appears.

4. Click **Yes** to delete the agreement.

   -OR-

   Click **Cancel** to dismiss the operation.

Modifying telework agreements

Employees and Supervisors may modify telework agreements. Telework agreements must be in pending status before they can be modified. Supervisors may revert telework agreements to pending status.

To modify a pending telework agreement, take these steps:

1. Click **Telework Agreements** under the Telework section on the main menu.

   The Telework Agreements page opens.

2. Click the **telework agreement status link** on the row that identifies the agreement you want to modify.

   The Telework Agreement page opens.

3. Make changes.

4. Click **Submit**.

   -OR-

   Click **Cancel** to dismiss changes and return to the previous page.

Terminating telework agreements

If a telework agreement needs to be closed before the Agreement Expires date, Employees and Supervisors may terminate the agreement. The data from terminated agreements remains in the webTA system. To terminate a telework agreement, take these steps:

1. Click **Telework Agreements** under the Telework section on the main menu.

   The Telework Agreements page opens.

2. Click the **telework agreement status link** on the row that identifies the agreement you want to terminate.
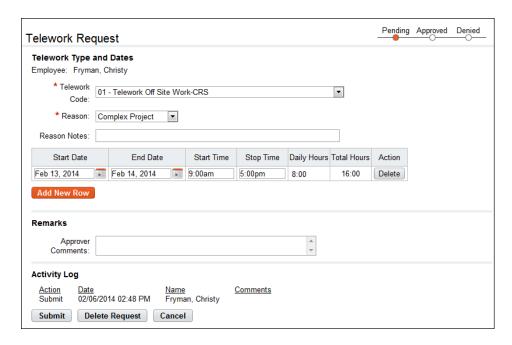
   The Telework Agreement page opens.

3. Type or specify a date in the **Termination Date** field.

4. Specify a reason from the **Reason** drop-down list.

5. Type a brief explanation in the **Terminator Remarks** text box.

6. Click **Terminate**.

   A message confirms that the action was successful.

About telework requests

Employees must submit telework requests prior to performing situational (also referred to as intermittent) telework. A sample Telework Request page is shown below.

Telework Request page contents

The Telework Request form includes the fields described below.

- **Employee**. The employee's name.
- **Telework Code**. The pay code to which telework hours will be charged.
- **Reason**. The reason that the employee is requesting telework.
- **Start and End Date**. The date that telework starts and ends.
- **Start and End Time**. The daily start and end time.
- **Daily Hours**. The daily total hours spent teleworking.
- **Total Hours**. The total hours of requested telework.
- **Approver Comments**. Use the text box to type a comment or remark about the request.

An activity log at the bottom of the page identifies each action taken, the date of the action, the user's name, and comments.

Adding telework requests

Employees and Timekeepers may add and submit telework requests. To add and submit a telework request, take these steps:

1. Click **Telework Requests** under the Telework section on the main menu.

   The Telework Request page opens.

2. Click **Add New Request**.

   The Telework Request page opens.

3. Complete the fields.

4. Click **Submit** or click **Cancel** to dismiss changes and return to the previous page.

Deleting telework requests

To delete a telework request, take these steps:

1. Click **Telework Requests** under the Telework section on the main menu.

   The Telework Request page opens.

2. Click the **telework request status link** on the row that identifies the request you want to delete.

   The Telework Request page opens.

3. Click **Delete**.

   A confirmation message appears.

4. Click **Yes** to delete the request or click **Cancel** to dismiss the operation.

Modifying telework requests

Employees and Timekeepers may modify telework requests. Telework requests must be in pending status before they can be modified. Supervisors may revert telework requests to pending status. To modify a pending telework request, take these steps:

1. Click **Telework Requests** under the Telework section on the main menu.

   The Telework Request page opens.

2. Click the **telework request status link** on the row that identifies the request you want to modify.

   The Telework Request page opens.

3. Make changes.

4. Click **Submit**.

   -OR-

   Click **Delete** to delete the request. A confirmation message displays. Click **Yes** to delete the request or click **Cancel**.

   -OR-

   Click **Cancel** to dismiss changes and return to the previous page.

Running webTA Reports

The following webTA reports are available to employees:

- Adhoc Report
- Leave Audit Report

    NOTE: Depending on your agency, different reports may be available.

Specifying the date range in reports

Some webTA reports let you specify a date range using the **From PP** and **To PP** drop-down lists. You may specify a date range that spans 26 pay periods (in other words, one year), such as 04/01/2013 to 04/01/2014. If the dates exceed the range, an alert displays and instructs you to adjust the dates.

Leave Audit Report

The Leave Audit report displays leave balances and adjustments for a specified type of leave within a designated range of pay periods.

Initially, the Leave Audit Report contains annual leave data for the most recent leave year for which the selected Employee has certified records. If the Employee has records in the system for more than one leave year, you may change the Start Date and the End Date parameters.

The Leave Audit Report is divided into one page for each leave type. The selector at the top of the page allows the Employee to change the type of leave.

The following columns are included in the Leave Audit Report:

- **Pay Period**. The pay period number followed by the leave year, for example, 22-2012. Pay period 01 is the first pay period that falls completely within the calendar year.
- **Manual Adjust**. Any adjustment that was made to the available leave in the pay period.
- **Forward**. The leave balance that was forwarded from the prior pay period.
- **Accrued**. The amount of leave accrued during the pay period. The column is blank for leave types that do not accrue, such as AWOL.
- **Available**. The total amount of leave that is available for use in the pay period. The column is blank for leave types that do not accrue, such as AWOL.
- **Used**. The amount of leave used by the employee in the pay period. This is usually the sum from the timesheet data submitted by the employee for the pay period. For annual and sick leave, it may also include LTP donations.
- **Balance**. The ending balance for the leave type in the pay period. This is usually the available leave minus the leave used. For non-accruable leave, this is usually the forwarded amount minus the used amount.
- **Maximum Available**. This column is included if the selected leave type is "Annual.". It shows the maximum annual leave amount currently available. Usually, this is the sum of the maximum accruable leave and the forwarded amount minus the used amount.

An example Leave Audit report is shown below.

Leave Audit

Report Date:	12/21/2015
Pay Period Range:	23 - 2015 : Nov 15, 2015-Nov 28, 2015 to 25 - 2015 : Dec 13, 2015-Dec 26, 2015
Employee :	White, Jay
Leave Type:	Annual Leave

Pay Period	Manual Adj	Forward	Accrued	Available	Used	Balance	Max Available
25 - 2015	0:00	144:00	10:00	154:00	0:00	154:00	160:00
24 - 2015	0:00	138:00	6:00	144:00	0:00	144:00	160:00
23 - 2015	0:00	132:00	6:00	138:00	0:00	138:00	160:00

To generate a Leave Audit report, take these steps:

1. Click **Reports** from the Reports section on the main menu.

    The Reports page opens.

2. Click **Leave Audit**.

    The page opens.

3. Use the following parameters:

    *   Select the pay period range from the **From PP** and **To PP** drop-down lists.
    *   Click the **Leave Type** drop-down list to select the type of leave.

4. Click **Run Report**.

5. To save the report in PDF, Excel, HTML, or CSV format, click the option at the top of the report. The File Download box opens. Click **Save**. The Save As dialog opens. Choose the location where you want to save the report, then click **Save**.

6. Click **Cancel** to go back to the Reports page.

Working with webTA Standard Report Tools

In addition to running standard reports, webTA users have access to accompanying tools, described below.

- **Background Execution option**. The Background Execution option allows users to run reports in background processing mode. This is useful for running reports that involve large amounts of data and may take a few moments to complete. While the report runs in background mode, users may continue to perform other tasks in webTA until the report is ready and available on the My Saved and Scheduled Reports page.

- **Standard My Saved and Scheduled Reports features**. The My Saved and Scheduled Reports option allows users to view, re-run, download, e-mail (to yourself), and delete reports generated in background processing mode. Additional functions are available to users with the Advanced Reporting license.

- **Standard Ad Hoc report tools**. The Ad Hoc report tool allows users in all roles except the Employee role to access the Adhoc Report Management page to create, edit and save ad hoc custom reports. The standard functionality may be used as an analytical tool that allows users to create report queries and view the result set. This is useful for gaining insight into the database structure and analyzing how tables are joined. Since the analytical use of the ad hoc report tool requires technical proficiency, Kronos recommends reading the complete topic "Working with webTA Advanced Reporting tools" even if you just want to use the standard functionality.

Using the Background Execution tool

This topic explains how to use the Background Execution option to run a report and the My Saved and Scheduled Reports option to view, e-mail (to yourself), download, or delete the report.

webTA includes the Background Execution option in the upper right corner of some reports. The option is useful with reports that require data intensive processing and may take a few minutes to run. The Audit Logs report includes the Background Execution option, shown in the screenshot below.

Selecting Background Execution options

To select Background Execution options, take these steps:
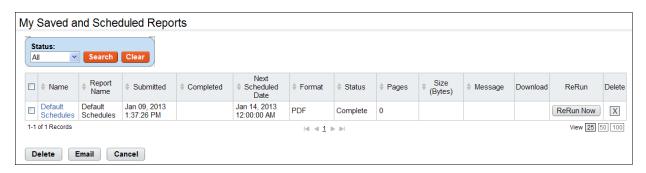
1. Click **Reports** on the main menu.

   The Reports page opens.

2. Click the **report name link** you want to work with.

   The report page opens.

3. Select the **report parameters** such as the date range, pay period range, transaction type, audit type, and so forth.

4. Click the **Background Execution** drop-down list in the upper right corner of the report parameters page. (The Background Execution drop-down list displays on some but not all NFC reports.)

5. Select an option from the Background Execution drop-down list.

   A message displays to confirm the report has been submitted for background processing.

6. Click **Cancel** to go back to the Reports page.

Using the My Saved and Scheduled Reports tool

To view, rerun, download, email (to yourself), or delete reports generated in background execution mode, click **My Saved and Scheduled Reports** from the Reports section on the main menu.

An example page is shown below.

	Name	Report Name	Submitted	Completed	Next Scheduled Date	Format	Status	Pages	Size (Bytes)	Message	Download	ReRun	Delete
☐	Default Schedules	Default Schedules	Jan 09, 2013 1:37:26 PM		Jan 14, 2013 12:00:00 AM	PDF	Complete	0				ReRun Now	X

1-1 of 1 Records

Users with the Advanced Reporting license have access to additional options such as the Report Schedule tool, not shown here. For details, please see the topic "Using the Report Schedule tool" below.

Retrieving reports generated by Background Execution options

To view, download, rerun, or email (to yourself)reports generated in background execution mode, take these steps:

1. Click **Reports** on the main menu.

   The Reports page opens.

2. Click **My Saved and Scheduled Reports** under the Reports table.

   The My Saved and Scheduled Reports page opens.

3. Click **Download**, **ReRun Now**, or **X** (Delete) on the row that contains the report.

   -OR-

   Click the check box on the row that identifies the report and select **Delete**, **Email**, or **Cancel**.

Working with webTA Advanced Reporting tools

If your agency has implemented the webTA Advanced Reporting module and you are a licensed user, you may be able to publish reports by role, use the Schedule Reports tool, and work with the Ad Hoc reports tool. Each tool is described below.

- **Publish Reports feature**. The Publish Reports feature allows users to make ad hoc and/or standard reports available to other users or organizations by role.

- **Advanced Reporting My Saved and Scheduled Reports features**. The My Saved and Scheduled Reports option allows users to view, re-run, download, e-mail (to yourself), and delete reports generated in background processing mode. Users with the webTA Advanced Reporting license may also schedule reports to run at regular intervals.

- **Advanced Reporting Ad Hoc report tools**. The Ad Hoc report tool allows users in all roles except the Employee role to access the Adhoc Report Management page to create, edit and save ad hoc custom reports.

  The standard functionality serves as an analytical tool for creating report queries and viewing the result set. This is useful for gaining insight into the database structure and analyzing how tables are joined.

  Users with the webTA Advanced Reporting license may use the functionality as a data extraction tool. For example, Supervisors may need to identify overtime worked within their employee group on a pay period basis; you may use the ad hoc report tool to create a custom report to extract the data relevant to the job roles and user data.

Publishing reports by role

The Publish Reports feature is available with the webTA Advanced Reporting module. The feature allows users to make ad hoc and/or standard reports available to other users or organizations by role. Depending on role properties and permissions, users may access different options in the Publish Reports feature.

In the example screenshot below, the Timekeeper has created an ad hoc report titled "EOM Final Report Data" and published it to Timekeepers, Supervisors, Master Timekeepers, and Master Supervisors in the NFCEXAMPLE/Agency/Technical Support organization.

Publish Reports

Select Report

Report: EOM Final Report Data   [Search for Report]

EMPLOYEE ROLE

⇕ Organization	Delete

No results

[Add Organization for Employee]

TIMEKEEPER ROLE

⇕ Organization	Delete
NFCEXAMPLE/Agency/Technical Support	[Delete]

1-1 of 1 Records |◄ ◄ 1 ► ►| View [25] [50] [100]

[Add Organization for Timekeeper]

SUPERVISOR ROLE

⇕ Organization	Delete
NFCEXAMPLE/Agency/Technical Support	[Delete]

1-1 of 1 Records |◄ ◄ 1 ► ►| View [25] [50] [100]

[Add Organization for Supervisor]

MASTER TIMEKEEPER ROLE

⇕ Organization	Delete
NFCEXAMPLE/Agency/Technical Support	[Delete]

1-1 of 1 Records |◄ ◄ 1 ► ►| View [25] [50] [100]

[Add Organization for Master Timekeeper]

MASTER SUPERVISOR ROLE

⇕ Organization	Delete
NFCEXAMPLE/Agency/Technical Support	[Delete]

1-1 of 1 Records |◄ ◄ 1 ► ►| View [25] [50] [100]

[Add Organization for Master Supervisor]

Publish Reports to Individual Employee(s)

⇕ Employee	Delete

No results

[Add Employee(s)]

[Cancel]

Publishing reports

To publish a report, take these steps:

1. Click **Publish Reports** from the Reports section on the main menu.

   The Publish Reports page opens.

2. Click **Search for Report** next to the None Selected prompt.

   The Select Report page opens. A table lists reports available to your role.

3. Click **Select** on the row that identifies the report you want to publish.

   The Publish Reports page refreshes. The name of the report you selected appears next to the Search for Report option near the top of the page.

4. If you want to publish the report to a specific role within a specific organization, click **Add Organization for <Role Name>**.

   The Select Organization page opens. A table lists organizations and sub-organizations available to your role.

   -OR-

   If you want to publish reports to individual employees, click **Add Employees**.

   The Select User page opens.

5. Click the **check box** on the row that identifies the organization or employee. (You may select more than one row.)

6. Click **Select Checked Organizations** or **Select Checked Users**.

   You return to the Publish Reports page.

   <u>If you are working with roles</u>, the organization populates the table under the role name. Users assigned to the role and organization may access and run the report.

   -OR-

   <u>If you are working with individual employees</u>, the employee name populates the table under Publish Reports to Individual Employee(s). The employee may access and run the report.

Deleting published reports

To remove a report so that it is no longer available to users, take these steps:

1. Click **Publish Reports** from the Reports section on the main menu.

   The Publish Reports page opens.

2. Click **Search for Report** next to the None Selected prompt.

   The Select Report page opens. A table lists reports available to your role.

3. Click **Select** on the row that identifies the report you want to remove.

   The Publish Reports page refreshes. The name of the report you selected appears next to the Search for Report option near the top of the page.

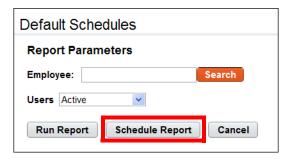4. Under Add Organization for <Role Name>, click **Delete** on the row that identifies the organization. The organization is removed from the table. The report is no longer accessible by the role and organization.
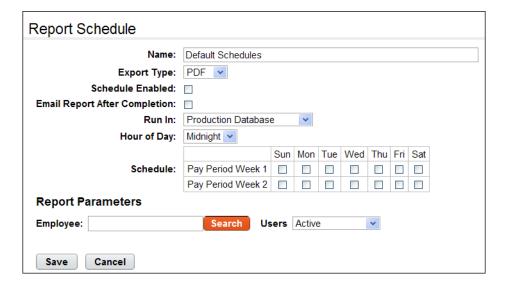
   -OR-

   Under Publish Reports to Individual Employee(s), click **Delete** on the row that identifies the employee. The employee is removed from the table. The report is no longer accessible by the employee.

Using the Report Schedule tool

The Report Schedule feature is available to employees who are licensed to use the webTA Advanced Reporting module. The Report Schedule tool lets employees run reports at regularly scheduled intervals. The tool is available on the report parameters page of any report to which you have access, as shown in the example below.

Click **Schedule Report** to access the Report Schedule page, shown below:

> *NOTE: The report parameters listed under the schedule vary by report.*

Report Schedule page contents

The following fields appear on the Report Schedule page:

- **Name**. The name of the report.
- **Export Type**. The type of file output. Options include PDF, XLS (Microsoft Excel), CSV (Comma Separated Values), and HTML (Hyper Text Markup Language).
- **Schedule Enabled**. Click the check box to enable the schedule.
- **Email Report After Completion**. Click the check box to email a copy of the report upon completion.
- **Run In**. Whether the report will be run from the production instance or the archive/reporting instance.

- **Hour of Day**. The hour of the day that the report will run.
- **Schedule**. The day(s) of the week during the pay period that the report will run.

To review the schedule or make changes, click **My Saved and Scheduled Reports** from the Reports section on the main menu. An example page is shown below:

Use this page to modify report schedules, delete report schedules, or e-mail a saved and scheduled report to yourself.

My Saved and Scheduled Reports page contents

Click the **Status** drop-down list and then click **Search** to see reports in one of the following statuses:

- **All**. See all reports in any status.
- **Pending**. The report has been scheduled to run but hasn't been picked up by the report creation job yet.
- **Queued**. The report has been picked up by the report creation job.
- **Generating**. The report is now being run by the report creation job.
- **Complete**. The report has been successfully generated.
- **Error**. The system encountered an error upon generating the report.
- **Invalid**. When an ad hoc report structure is changed, all of the associated report schedule instances are marked invalid. You must create a new report schedule.

The following columns appear on the My Saved and Scheduled Reports table:

- **Name link**. Click the link to open the report schedule.
- **Report Name**. The name of the report schedule.
- **Submitted**. The date and time that the schedule was created.
- **Completed**. The date and time that the report last completed its scheduled run.
- **Next Scheduled Date**. The date and time the report is next scheduled to run.
- **Format**. The type of report output file. Options include: PDF, Microsoft Excel (XLS), CSV or HTML.
- **Status**. The current status of the report.
- **Pages**. The number of pages of report file output.
- **Size (Bytes)**. The size of the output file.
- **Message**. System messages produced when the report was generated.
- **Download**. Download the report file to a local computer.

- **Rerun**. Run the report now.

Adding and saving report schedules

To add and save a report schedule, take these steps:

1. Click **Reports** from the Reports section on the main menu.

   The Reports page opens.

2. Click the report that you want to schedule.

   The page opens.

3. Click **Schedule Report**.

   The Report Schedule page opens.

4. Complete the fields.

5. Specify the report parameters.

6. Click **Save** and then click **Cancel** to go back to the previous page.

Viewing saved and scheduled reports

To view a report schedule, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.

   The My Saved and Scheduled Reports page opens.

2. Click **Cancel** to go back to the previous page.

E-mailing saved and scheduled reports to yourself

To e-mail a saved and scheduled report to yourself, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.

   The My Saved and Scheduled Reports page opens.

2. Click the check box on the row that identifies the report and then click **Email** near the bottom of the page.

   A confirmation message appears.

3. Click **Yes** to e-mail the report.

   - OR -

   Click **No** to cancel the operation.

4. Click **Cancel** to go back to the previous page.

Modifying report schedules

To modify a report schedule, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.

   The My Saved and Scheduled Reports page opens.

2. Click the **report name link**.

    The Report Schedule page opens.

3. Make changes.

4. Click **Save** and then click **Cancel** to go back to the previous page.

Deleting report schedules

To delete a report schedule, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.

    The My Saved and Scheduled Reports page opens.

2. Click the check box on the row that identifies the report and then click **Delete**.

    A confirmation message appears.

3. Click **Yes** to delete the report schedule.

    - OR -

    Click **No** to cancel the operation.

Using the Ad Hoc reports tool

The Ad Hoc reports tool may be used for two different purposes, described below.

*   **Analytical tool**. Administrators and DBAs may use the tool to gain insight into the database structure and analyze how tables are joined. This is a standard function of the ad hoc report management tool and is available as a feature of the webTA NFC Core product. For more details, see the explanation of the Generated SQL text box below.

*   **Data extraction tool**. Administrators and other roles may use the tool to create reports that users run to extract data that is relevant to specific job roles. For example, Supervisors may need to identify overtime worked within their employee group on a pay period basis; you may use the ad hoc report tool to create a custom report to quickly gather the data. This use of the ad hoc reports tool requires implementing the Advanced Reporting module and users require the accompanying license in order to run the reports.

    NOTE: Work with ad hoc reports from an archive/reports instance.

This topic explains how to perform the following ad hoc report procedures:
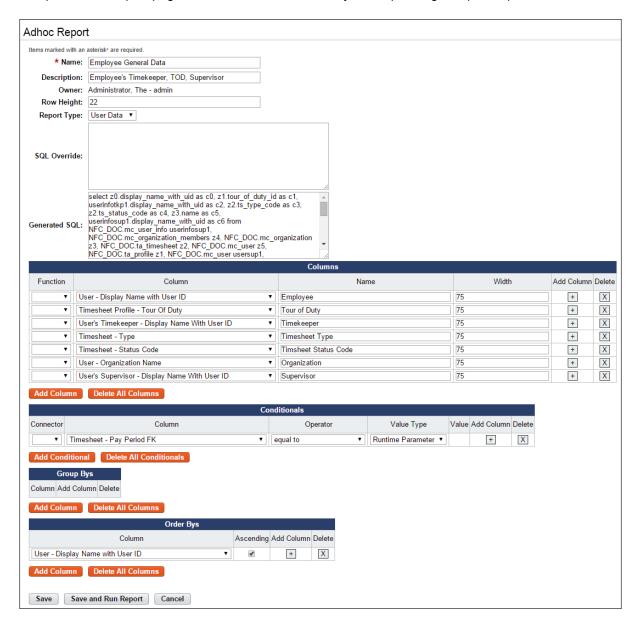
*   Adding ad hoc reports
*   Testing ad hoc reports
*   Troubleshooting common report errors
*   Deleting ad hoc reports
*   Managing report quota storage

Adhoc Report page content

The Adhoc Report page includes features for creating simple reports to more complex reports. Some of the features require skills outside the scope of this document (for example, SQL programming language.)

This topic provides a general overview of each feature with an accompanying example from a default adhoc report called "Build Report."

A sample Adhoc Report page is shown below, followed by corresponding sample output:

Adhoc Report

Items marked with an asterisk* are required.

* Name:	Employee General Data
Description:	Employee's Timekeeper, TOD, Supervisor
Owner:	Administrator, The - admin
Row Height:	22
Report Type:	User Data
SQL Override:	
Generated SQL:	select z0.display_name_with_uid as c0, z1.tour_of_duty_id as c1, userinfotkp1.display_name_with_uid as c2, z2.ts_type_code as c3, z2.ts_status_code as c4, z3.name as c5, userinfosup1.display_name_with_uid as c6 from NFC_DOC.mc_user_info userinfosup1, NFC_DOC.mc_organization_members z4, NFC_DOC.mc_organization z3, NFC_DOC.ta_timesheet z2, NFC_DOC.mc_user z5, NFC_DOC.ta_profile z1, NFC_DOC.mc_user usersup1,

Columns

Function	Column	Name	Width	Add Column	Delete
	User - Display Name with User ID	Employee	75	+	X
	Timesheet Profile - Tour Of Duty	Tour of Duty	75	+	X
	User's Timekeeper - Display Name With User ID	Timekeeper	75	+	X
	Timesheet - Type	Timesheet Type	75	+	X
	Timesheet - Status Code	Timsheet Status Code	75	+	X
	User - Organization Name	Organization	75	+	X
	User's Supervisor - Display Name With User ID	Supervisor	75	+	X

Add Column   Delete All Columns

Conditionals

Connector	Column	Operator	Value Type	Value	Add Column	Delete
	Timesheet - Pay Period FK	equal to	Runtime Parameter		+	X

Add Conditional   Delete All Conditionals

Group Bys

Column	Add Column	Delete

Add Column   Delete All Columns

Order Bys

Column	Ascending	Add Column	Delete
User - Display Name with User ID	✓	+	X

Add Column   Delete All Columns

Save   Save and Run Report   Cancel

Here is corresponding sample output form the ad hoc report:

Adhoc Report

Employee General Data

Adhoc Report

Employee	Tour of Duty	Timekeeper	Timesheet Type	Timsheet Status Code	Organization	Supervisor
Allen, Jacob - jallen	Full Time	White, Jay - jwhite	Regular	Saved	NFCEXAMPLE	White, Jay - jwhite
Anderson, Noah - nanderson	Full Time	White, Jay - jwhite	Regular	Saved	Agency	White, Jay - jwhite

General Information

This area of the adhoc report includes high level information such as the report name. Here is a brief description of each field:

- **Name**. The name of the report. This is a required field. The field supports up to 100 characters.
- **Description**. A short description. The field supports up to 255 characters. If the report will be available to other users, be clear about the purpose of the report.
- **Owner**. The name of the user who created the report.
- **Row Height**. The row height for the report output, in pixels. If the value is too small for the content of a cell, it will expand vertically. You can specify the width of each column (see "Columns.")
- **Report Type**. The type of data that the report extracts from the database. One report type may be selected for each report.
    - User Data. User data is directly associated with one or more users (for example, employee profiles, timesheets, leave balances, timesheet profile data, etc.) This is the default option.
    - Audit Data. Audit data is directly related to audit information (for example, invalid login attempts, etc.) This option is limited to System Administrators.
    - Data Sets. Data sets are ueseful for lookup values, for example, lists of Alternate Work Schedule values, Transaction Code values, Tour or Duty values, etc. This option is limited to System Administrators.

An example of the General Information area is shown below:

Adhoc Report

Items marked with an asterisk* are required.

* **Name:** Employee General Data
Description: Employee's Timekeeper, TOD, Supervisor
Owner: Administrator, The - admin
Row Height: 22
Report Type: User Data ▾

SQL Override

This feature provides a text box for manual entry of Structured Query Language (SQL) commands and may be used independently or in conjunction with the Columns table so that you can give the manual SQL columns meaningful names on the report. The SQL Override feature is only available to System Administrators. Reports that include the use of this feature cannot be published for access by other users.
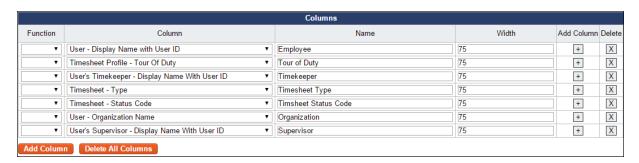
Generated SQL

When you save an ad hoc report, the system generates and displays the SQL query in the Generated SQL text box. This feature may be used to gain insight into the database structure and allows Administrators and DBAs to examine how tables are joined. Copy and paste the generated SQL into a third party tool to analyze the generated SQL.

Columns

This feature lets you specify what data you want to be displayed in the report, for example, the employee's first and last name, their TL Unit, and the date their timesheet was last validated. You can label each column and adjust the width of the row that is displayed in the report output, or accept defaults. You can also specify aggregate functions. Here is a brief description of each field:

- Function. A list of aggregates that are used in conjunction with the Group Bys feature.
  - SUM. Adds values together. For example, use SUM to total hours in the timesheet pay period instead of listing separate daily totals.
  - AVG. Average of all the values.
  - MIN. Smallest of all the values.
  - MAX. Largest of all the values.
  - COUNT. Count of all the values.
- Column. A list of data that you can specify for display in the report.
- Name. The name for the data that you selected from the Column field. (This is a required field. The system displays an error if the Name is blank.)
- Width.The width of the column, in pixels. By default, the width is 75.

An example of the Columns area is shown below:

Columns					
Function	Column	Name	Width	Add Column	Delete
▼	User - Display Name with User ID ▼	Employee	75	+	X
▼	Timesheet Profile - Tour Of Duty ▼	Tour of Duty	75	+	X
▼	User's Timekeeper - Display Name With User ID ▼	Timekeeper	75	+	X
▼	Timesheet - Type ▼	Timesheet Type	75	+	X
▼	Timesheet - Status Code ▼	Timsheet Status Code	75	+	X
▼	User - Organization Name ▼	Organization	75	+	X
▼	User's Supervisor - Display Name With User ID ▼	Supervisor	75	+	X

Add Column   **Delete All Columns**

Conditionals

This feature lets you construct custom queries that include conditions.

- Connector. A list of logic connectors. Use connectors to construct conditionals. For example, you might construct a conditional that performs the following query: "Select data where ((first name is Bart and last name is Berman) OR (first name is Rashid and last name is Ahmed) AND (pay period is not 0000-01)). The query would select timesheet data for Bart Berman and Rashid Ahmed but not for pay periods with the year "0" and pay period number "1." Connectors are listed below:
  - ( ).
  - AND.
  - OR.
  - NOT.
- Column. A column that forms the first piece of the conditional.

- Operator. A list of logic operators. Use operators to construct conditionals. Operators are listed below:
  - Equal to. The value in the Column is exactly equal to the Value Type and Value.
  - Case insensitive equal to. The value in the Column is equal to the Value Type and Value, whether or not the value is upper or lower case.
  - Not equal to. The value in the Column is not equal to the Value Type and Value.
  - Less than. The value in the Column is less than the Value Type and Value.
  - Less than or equal to. The value in the Column is less than or equal to the Value Type and Value.
  - Greater than. The value in the Column is greater than the Value Type and Value.
  - Greater than or equal to. The value in the Column is greater than or equal to the Value Type and Value.
  - Like. The value in the Column is a case-sensitive wild card.
  - Case insensitive like. The value in the Column is a case-insensitive wild card.
  - In. Use the "in" operator in conjunction with the "query" Value Type to run a sub-query.
  - Is null. The value in the Column is blank.
  - Is not null. The value in the Column is anything that is not blank.
- Value Type.
  - Literal. The value in the Column matches whatever is specified in the Value field.
  - Runtime Parameter. The value in the Column matches whatever the user types in the Report Parameter field.
  - Query. Lists all of the ad hoc reports the user has created. This allows users to run an existing ad hoc report as a nested sub-query. Use this in conjunction with the "in" or the "equal to" operators.
  - Table Column. Links two table columns with each other. For example, compare the first and last name of an employee against the first and last name of their Timekeeper. If there is a match, the employee may be their own Timekeeper (unless there is another user in the system with the same first and last name as the employee in question.)

An example of the Conditionals area is shown below:

Conditionals						
Connector	Column	Operator	Value Type	Value	Add Column	Delete
▼	Timesheet - Pay Period FK ▼	equal to ▼	Runtime Parameter ▼		+	X
Add Conditional **Delete All Conditionals**						

Group Bys

This feature works in conjunction with the aggregate function specified in the Columns feature. For example, if SUM is specified for total hours in the user's timesheet, specify how the data will be grouped. A sample Group Bys section is shown below:

Group Bys		
Column	Add Column	Delete
User - Display Name with User ID ▼	+	X
Add Column **Delete All Columns**		

Order Bys

This feature determines the sort order in which the data will be presented in the report. Enable the check box to list data in ascending order. A sample Order Bys section is shown below:

Adding ad hoc reports

To add an ad hoc report, take these steps:

1. Click **Adhoc Reports** from the Reports section on the main menu.

   The Adhoc Report Management page opens.

2. Click **Add New Adhoc Report**.

   The Adhoc Report page opens.

3. Type a report name in the **Name** field. This is a required field.

4. Type a short description in the **Description** field.

5. Accept the default row height or type in a different height.

6. Accept the default value from the **Report Type** drop-down list.

   NOTE: The default value is User Type, which extracts data that is directly associated with one or more users (for example, employee profiles, timesheets, leave balances, timesheet profile data, etc.) Administrators have access to the Audit Type and Data Sets options. The Audit Type option extracts data that is directly related to audit information (for example, invalid login attempts, etc.) Data Sets are useful for lookup values, for example, Alternate Work Schedule values, Transaction Code values, Tour or Duty values, etc.

7. Optionally, enter SQL commands in the **SQL Override** text box. (This option may not be available to all users.)

8. To add columns, take these steps:

   • Click **Add Column**. A new row is added under the Columns area.

   • Select a value from the **Column** drop-down list.

   • Type a descriptive name in the **Name** field. (If the field is blank, the report displays the default column name.)

   • Accept the default row width or type in a different width

   • Optionally, select an operator from the **Function** drop-down list.

9. To add conditionals, take these steps:

   • Click **Add Conditional**. A new row is added under the Conditionals area.

   • Select a value from the **Column** drop-down list.

   • Select a logic phrase from the Operator drop-down list.

   • Select an end user display option from the Value Type drop-down list. SME: Is this the purpose of Value Type?

- Select a logic connector from the Connector drop-down list.

10. To specify the order in which columns are displayed in the report, take these steps:

    - Click **Add Column**. A new row is added under the Group Bys area.

    - Select a value from the **Column** drop-down list.

11. To specify the order, take these steps:

    - Click **Add Column**. A new row is added under the Group Bys area.

    - Select a value from the **Column** drop-down list.

12. Click **Save**. Click **Run Report** to test the output.

    -OR-

    Click **Cancel** to go back to the previous page.

Modifying ad hoc reports

To modify an ad hoc report, take these steps:

1. Click **Adhoc Reports** from the Reports section on the main menu.

   The Adhoc Report Management page opens.

2. Click the **ad hoc report name link**.

   The Adhoc Report page opens.

3. Make changes.

4. Click **Save**. A message confirms that the changes were saved.

5. Click **Cancel** to go back to the previous page.

   - OR -

   Click **Save and Run Report** to run the report with the changes you made.

Running ad hoc reports

To run an ad hoc report, take these steps:

1. Click **Reports** from the Reports section on the main menu.

   The Reports page opens.

2. Click the **Adhoc Report name link**.

   The Adhoc Report page opens.

3. Select the report from the **Adhoc Report** drop-down list.

4. Select a role from the **Role** drop-down list. Only roles to which you have been assigned are available.

5. Click the **Include Delegates** check box to see all employee data for all roles delegated to you. Clear the check box to see employee data limited to your direct role assignments.

6. Depending on the report, you may be able to select additional parameters.

7. Click **Run Report**.

   The report output is displayed. Click **Reset** to restore the page to default settings.

- OR -

Click **Schedule Report** to run the report at regularly scheduled intervals.

- OR -

Click **Cancel** to go back to the previous page.

Testing ad hoc reports

To test an ad hoc report, take these steps:

1. Click **Adhoc Reports** from the Reports section on the main menu.

   The Adhoc Report Management page opens.

2. Click the **ad hoc report name link**.

   The Adhoc Report page opens.

3. Click **Run Report** near the bottom of the page.

   The Ad Hoc Report Parameters appear. Depending on the report, the parameters may vary.

4. Select the report that you want to test from the **Adhoc Report** drop-down list.

5. Select a role from the **Role** drop-down list. Only roles to which you have been assigned are available.

6. Click the **Include Delegates** check box to see all employee data for all roles delegated to you. Clear the check box to see employee data limited to your direct role assignments.

7. Depending on the report, you may be able to click **Pick Value** for pay period data, users, or AWS.

8. Click **Run Report**.

   The report output is displayed. Click **Cancel** to go back to the previous page.

   - OR -

   Click **Schedule Report** to run the report at regularly scheduled intervals.

   - OR -

   Respond to errors, make changes, and test the report again.

Deleting ad hoc reports

You can only delete ad hoc reports that you created. To delete an ad hoc report, take these steps:

1. Click **Adhoc Reports** from the Reports section on the main menu.

   The Adhoc Report Management page opens.

2. Click the "X" under the Delete column on the row that identifies report.

   A message confirms that the report was deleted.

Troubleshooting common report errors

Common report errors will be accompanied by a descriptive error message that identifies what the problem is.