webTA 4.2.8 NFC Core HR Administrator User Guide

December 2015

Published by Kronos Incorporated
297 Billerica Road, Chelmsford, Massachusetts 01824-4119
Phone: 978-250-9800, Fax: 978-367-5900
Kronos Incorporated Global Support: 1-800-394-HELP (1-800-394-4357)

webTA 4.2
NFC Core HR AdministratorUser Guide
Product Version: webTA 4.2.8
Release Date: December 2015

Contents

Introduction 1
- Selecting Employees and Timesheets 2
- Select Employees page 2
- Searching for Employees 3
  - Using search criteria in free-text fields 3
  - Using drop-down lists to filter information 3
  - Select Action menus. 4
- Selecting Timesheets 4
  - Using drop-down lists to filter information 6
  - Using links on the Select Timesheets page 6
  - Select Action menus. 7

Managing Delegates 7
  - Adding delegates 7
  - Deleting delegates 8
  - Reassigning employees to Timekeepers 8
  - Reassigning employees to Supervisors 9

Sending Messages 10

Timesheet Summary 10
- About Processed Timesheets 11
  - Viewing processed timesheets 11

Timesheet Profiles 12
  - Editing timesheet profiles 16
  - Splitting timesheet profiles 17

Leave Balances 18
  - Viewing employee leave balances 18
  - Adjusting employee leave balances 19
- About COP Balances 19
  - Viewing COP events 19
  - Viewing employee COP balances 20

Working with Employee Profiles 21
  - Adding employees 24

Contents

Viewing employee profiles . . . 25
Resetting user passwords . . . 25
Adding users who do not track time . . . 25

Working with Schedules . . . 29
About default schedules . . . 29
Viewing default schedules . . . 29
About advanced scheduling . . . 30
Adding or modifying shifts . . . 33
Assigning shifts to organizations . . . 34
Unassigning shifts from organizations . . . 34
Adding schedule templates . . . 36
Assigning schedule templates to organizations . . . 36
Opening the Employee Schedules List View . . . 37

Leave Transfer Program Management . . . 38
Adding LTP accounts . . . 38
Closing LTP accounts . . . 38
Deleting LTP accounts . . . 39
Adding recipients . . . 39
Editing recipients . . . 40
Deleting recipients . . . 40
About donations . . . 40
Adding donations . . . 41
Approving donations . . . 41
Deleting donations . . . 42
Rejecting donations . . . 42
Reverting donations to pending . . . 42

Organization Management . . . 43
Viewing organizations and sub-organizations . . . 43
Deleting organizations . . . 44
Inactivating organizations . . . 44
Deleting sub-organizations . . . 45
Moving sub-organizations . . . 46

Contents

Adding and deleting organization members 46
Exporting organizations 47

Managing Accounts 48
Creating accounts 49
Editing accounts 49
Deleting accounts 51
Viewing the account master list 52

System Set Up 53
Bidirectional Configurations 53
Specifying the bidirectional configuration 54

Running webTA Reports 55
Specifying the date range in reports 55
Active Timesheets 55
Bidirectional Leave Changes 56
Bidirectional New Hires 57
Bidirectional Profile Audit 57
Bidirectional Summary 58
Final Timesheets Report 58
New Employees Report 59
Organization Assignment 59
Role Assignment 60
Supervisor Assignments 61
Telework by Employee Report 61
Telework Degree of Participation 62
Telework Summary of Hours by Pay Period 63
Timekeeper Assignments 63
Timesheet Status Report 64
Timesheet Summary Report 65
Unassigned Employees 66
Uncertified Timesheets Report 66

Contents

Unprocessed Timesheets . . . 67

Working with webTA Standard Report Tools . . . 69
Using the Background Execution tool . . . 69
Selecting Background Execution options . . . 69
Using the My Saved and Scheduled Reports tool . . . 70
Retrieving reports generated by Background Execution options . . . 70

Working with webTA Advanced Reporting Tools . . . 71
Publishing reports by role . . . 71
Publishing reports . . . 72
Deleting published reports . . . 73
Using the Report Schedule tool . . . 74
Adding and saving report schedules . . . 76
Viewing saved and scheduled reports . . . 76
E-mailing saved and scheduled reports to yourself . . . 76
Modifying report schedules . . . 76
Deleting report schedules . . . 77
Using the Ad Hoc report tool . . . 77
Adding ad hoc reports . . . 82
Modifying ad hoc reports . . . 83
Running ad hoc reports . . . 83
Testing ad hoc reports . . . 84
Deleting ad hoc reports . . . 84
Troubleshooting common report errors . . . 84

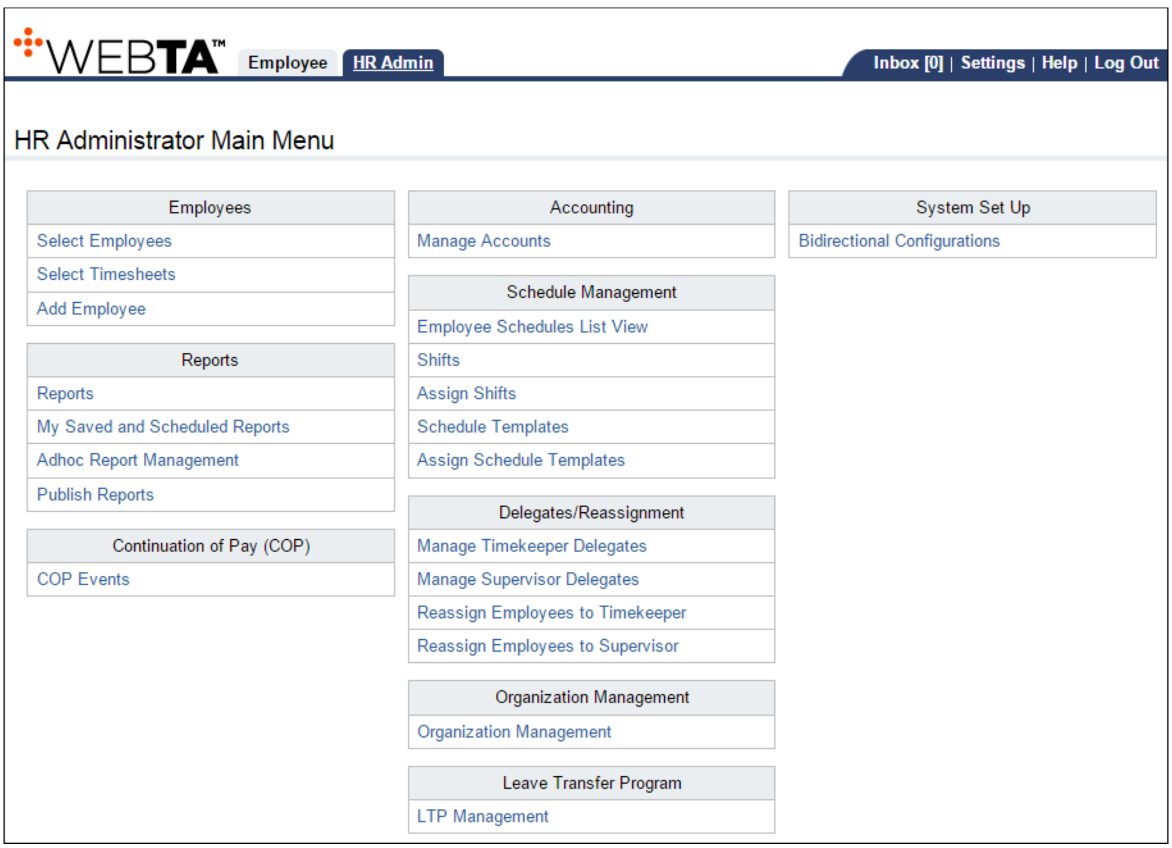
Introduction

This guide explains how to perform functions that are available to webTA users who are assigned the HR Administrator role. These functions include managing accounts, advanced schedules, organizations, and leave transfer programs. Other tasks include delegating Timekeepers and Supervisors, adjusting leave balances, and running reports.

This guide does not cover basic 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 HR Administrator main menu displays functions available to the HR Administrator role. Depending on how webTA is implemented at your agency, some functions shown in the example below may not be available.

> ***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.*



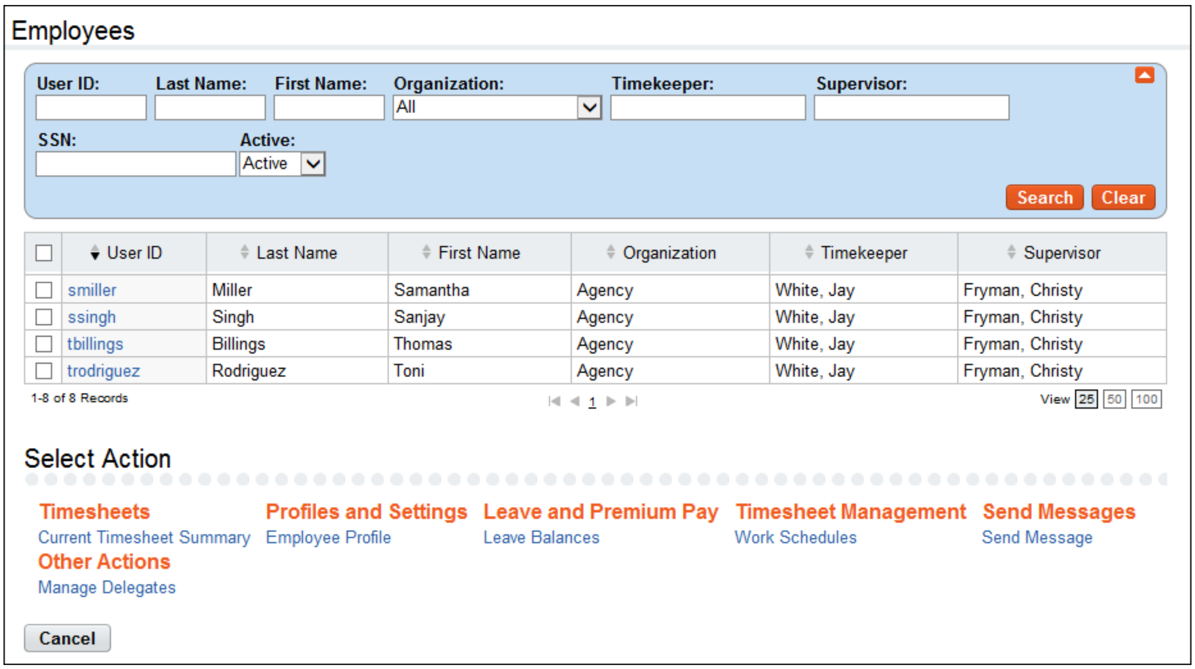
> ***NOTE:*** *This user guide contains graphical representations (screen shots) of the generic webTA application. These illustrations are intended to provide guidance and may not exactly match the configuration that is implemented at your agency. All user names are fictional.*

Selecting Employees and Timesheets

HR Administrators may use either the Select Employees page or the Select Timesheets page to work with employees and timesheets. By default, the Select Employees page is restricted to HR Administrators and Administrators. The sections below describe each page.

Select Employees page

The Select Employees page lists employees, provides search and filter capabilities, and provides access to the Select Action menus. The page is only available to HR Administrators and Administrators.



Use the Select Employees search function to filter employees by making selections from drop-down lists or typing search criteria in fields. Drop-down lists and search fields are described below:

To search for employees, use these drop-down lists or search criteria:

- **User ID**. Type search criteria to search for employees by User ID.
- **Last Name**. Type search criteria to search for employees by last name.
- **First Name**. Type search criteria to search for employees by first name.
- **Organization**. Use this drop-down list to select employees assigned to a specific organization.
- **Timekeeper**. Type search criteria to search for employees assigned to a specific Timekeeper.
- **Supervisor**. Type search criteria to search for employees assigned to a specific Supervisor.
- **SSN**. Type the exact SSN to search for a specific employee.
- **Role**. Use the drop-down list to select users assigned to a specific role. (This filter is only available to Administrators.)
- **Active**. Use this drop-down list to display records with these employee statuses:
  - All. Displays employee records with Active and Inactive statuses.
  - Inactive. Displays employee records who are no longer active in the system.

- Active. Displays employee records who are currently active in the system.

Searching for Employees

Using the Employees search function, you can search by:

- User ID
- Last name only
- First name only
- Timekeeper
- Supervisor

Search field criteria are listed below.

Using search criteria in free-text fields

You can enter text or numbers, a wildcard, or both.

> ***NOTE**: Do not include quotation marks in the search criteria.*

To enter text, numbers, or wild cards:

- By user ID. Type the user ID in the User ID search field, and then click **Search**.
- For all Employees with the same last name. Type the name in the Last Name field and then click **Search.** For example, type "White" and click **Search.** The system adds an implied asterisk wildcard at the end and matches employees with a last name of "White" , "Whitehouse", "Whitey" , etc.
- For all Employees with the same first name. Type the name in the First Name field and then click **Search**. For example, type "Jay" and click **Search**. The system finds employees with the first name "Jay."
- To use wildcards, type an asterisk to match text or numbers, or type a question mark to match a single character.

To search for employees:

1. Type search criteria in the **User ID**, **Last Name**, **First Name, Timekeeper** or **Supervisor** fields and then click **Search**.
2. The system matches the criteria.
3. To start over, click **Clear** and the page returns to its default state.

Using drop-down lists to filter information

To use a drop-down list to filter information on the Select Employees page, take these steps

1. Select the option from the filter drop-down menu. For example, select **Validated by Employee** from the Timesheet Status drop-down menu.
2. Click **Search**.
3. The results are displayed. For example, if you selected Validated by Employee from the Timesheet Status drop-down menu, timesheets with the current status *Validated by Employee* are displayed.

4. To start over, click **Clear** and the page returns to its default state.

User IDs are available as hyperlinks on the Select Employees page. Click a **user ID link** to open an employee's timesheet profile.

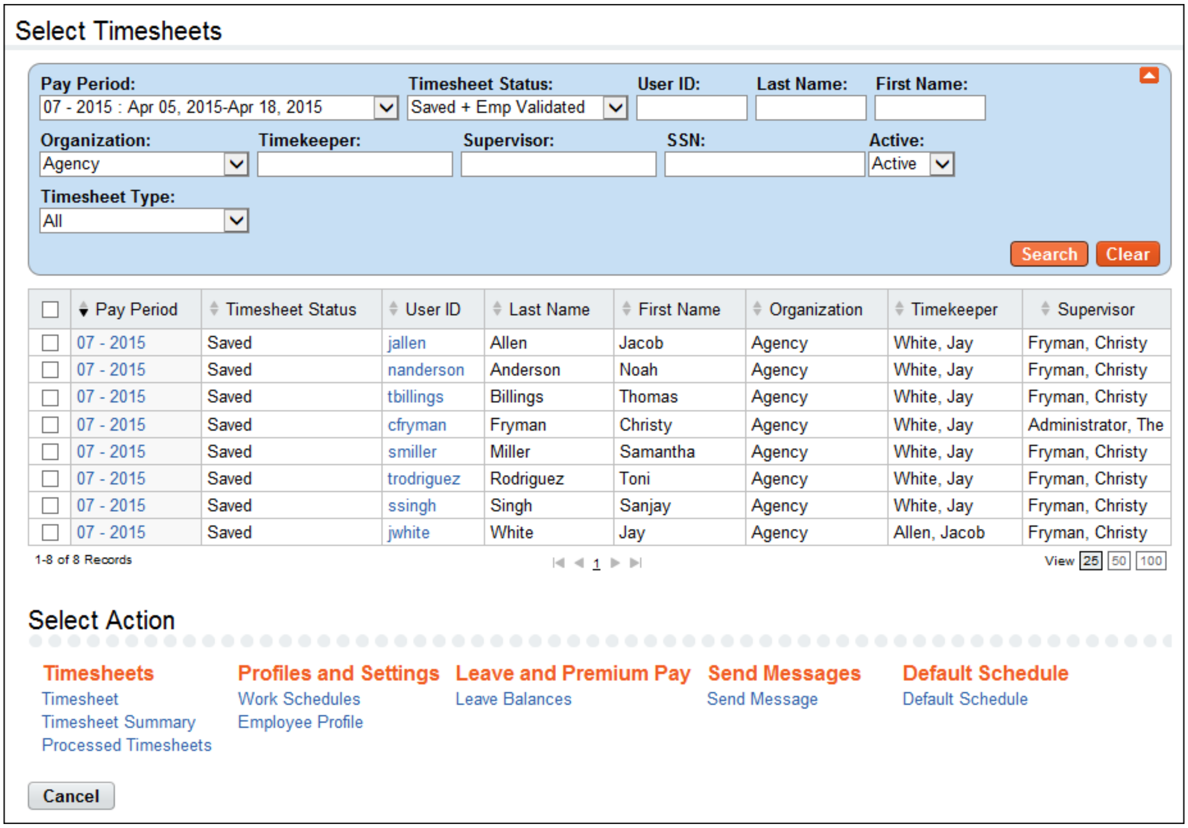
Select Action menus

The lower part of the Select Employees page contains the Select Action menus, described below.

- **Timesheets**
  - Current Timesheet Summary. View one or several Timesheet Summaries.
- **Profiles and Settings**
  - Employee Profile. View and edit an employee profile.
- **Leave and Premium Pay**
  - Leave Balances. View and adjust leave balances for one or several employees.
- **Timesheet Management**
  - Work Schedules. View and edit employee work schedules.
- **Send Messages**
  - Send Message. Send a message to one or more employees.
- **Other Actions**
  - Manage Delegates. Add, delete, or reassign delegates.

Selecting Timesheets

The Select Timesheets page lists timesheets by pay period. It includes search and filter capabilities, and provides access to the Select Action menus.



Use the Select Timesheets search filters by selecting from drop-down lists or typing search criteria in fields. Drop-down lists and search fields are described below:

To search for timesheets, use these drop-down lists or search criteria:

- **Pay Period**. Use this drop-down list to select a specific pay period or all pay periods.
- **Timesheet Status**. Use this drop-down list to display employee records with a specific timesheet status:
  - All. If you select All pay periods + All timesheet statuses, the system shows all timesheets that are not processed for every pay period. If you select a specific pay period + All timesheet statuses, the system shows all timesheets (including processed timesheets) for the specific pay period.
  - Saved. Displays records with the timesheet status Saved.
  - All Validated. Displays records that have been validated by employees and Timekeepers.
  - Validated by Employee. Displays records that have been validated by employees.
  - Validated by Timekeeper. Displays records that have been validated by Timekeepers.
  - Validation Overridden. Displays records that have had validation overridden.
  - Certified and Pre-Processed. Displays records that have been validated, certified, and are ready to be built.
  - Processed. Displays records that have been processed for payroll for a specific pay period.

    ***NOTE**: You must select a specific pay period from the Pay Period drop-down list. If you select All pay periods + Processed timesheet status, no results are shown and the following alert appears: "Must choose a pay period for processed timesheets."*

  - Saved + Emp Validated. Displays records that have been saved, as well as records that have been validated by employees.
  - Saved + All Validated. Displays records that have been saved, as well as all records that have been validated.
- **User ID**. Type search criteria to search for employees by User ID.
- **Last Name**. Type search criteria to search for employees by last name.
- **First Name**. Type search criteria to search for employees by first name.
- **Organization**. Use this drop-down list to select employees assigned to a specific organization.
- **Timekeeper**. Type search criteria to search for employees assigned to a specific Timekeeper.
- **Supervisor**. Type search criteria to search for employees assigned to a specific Supervisor.
- **SSN**. Type an SSN to search for a specific employee.
- **Active**. Use this drop-down list to display records with these employee statuses:
  - All. Displays employee records with Active and Inactive statuses.
  - Inactive. Displays employee records who are no longer active in the system.
  - Active. Displays employee records who are currently active in the system.
- **Timesheet Type**. Use this drop-down list to display timesheets with these statuses:
  - All. Displays both correction and regular timesheets.
  - Correction. Displays correction timesheets.
  - Regular. Displays regular timesheets.
  - Invalid Timesheet Profile. Displays employees with incomplete timesheet profiles.
  - On Hold. Displays timesheets that have been placed on hold. If the On Hold option is checked (Timesheet Profile > On Hold), the employee's timesheet is not transmitted to the payroll provider for processing. Users can save changes to timesheets that are on hold, but the timesheet cannot be validated nor processed.

Using drop-down lists to filter information

To use a drop-down list to filter information on the Select Timesheets page, take these steps

1. Select the option from the filter drop-down menu. For example, select **Validated by Employee** from the Timesheet Status drop-down menu.
2. Click **Search**.
3. The results are displayed. For example, if you selected Validated by Employee from the Timesheet Status drop-down menu, timesheets with the current status *Validated by Employee* are displayed.
4. To start over, click **Clear** and the page returns to its default state.

Using links on the Select Timesheets page

Depending on your role, pay periods and user IDs may be available as hyperlinks on the Select Timesheets page.

Here is a brief description of each link

- **Pay period links**. Click a pay period link to open an employee's timesheet. The following correction codes may appear in parentheses after the pay period.
  - (LC) Local Correction.
  - (C) Regular Correction.

    - (P) Prior Correction.
- **User ID links**. Click a user ID link to open an employee's timesheet profile.

Select Action menus

The lower part of the Select Timesheets page contains the Select Action menus, described below.

- **Timesheets**
    - Timesheet. Access one or several timesheets.
    - Timesheet Summary. View one or several Timesheet Summaries.
    - Processed Timesheets. View timesheets that have been certified and processed.
- **Profiles**
    - Work Schedules. View and edit one or several work schedules.
    - Employee Profile. View and edit an employee profile.
- **Leave and Premium Pay**
    - Leave Balances. View leave balances for an employee, including details that show the amount accrued by pay period. The HR Administrator may make manual adjustments to accrual leave balances such as Annual Leave and Sick.
- **Messages**
    - Send Message. Send a message to one or more employees in your group.
- **Default Schedule**
    - Default Schedule. View one or several default schedules.

Managing Delegates

HR Administrators may manage Timekeeper, Supervisor, and Project Manager delegates. HR Administrators may also reassign employees to different Timekeepers and Supervisors.

Adding delegates

To delegate a Timekeeper, Supervisor or Project Manager role, take these steps:

1. Click **Manage Timekeeper Delegates** from the Delegates/Reassignment section on the main menu.

   NOTE*: Optionally, select Manage Supervisor Delegates or Manage Project Manager Delegates.*

   The Add Delegate page opens.

2. Click **Select** on the row that identifies the Timekeeper, Supervisor or Project Manager for whom you want to delegate a backup.

   The Delegate Roles page opens. A table lists users who have already been delegated as a backup for the Timekeeper, Supervisor or Project Manager.

3. Click **Add Delegate**.

   The Add Delegate page opens. A table lists users who are qualified to be selected as delegates.

4. Click the check box next to user(s) you want to select as delegates and then click **Select Checked Users**.

   A message confirms that the delegation was successful.

5. Add more delegates.

   -OR-

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

Deleting delegates

To remove a delegate from a Timekeeper, Supervisor or Project Manager role, take these steps:

1. Click **Manage Timekeeper Delegates** from the Delegates/Reassignment section on the main menu.

   NOTE*: You may select Manage Supervisor Delegates or Manage Project Manager Delegates, depending on your task.*

   The Add Delegate page opens.

2. Click **Select** on the row that identifies the Timekeeper, Supervisor or Project Manager from whom you want to remove a delegate.

   The Delegate Roles page opens. A table lists users who have already been delegated as a backup for the Timekeeper, Supervisor or Project Manager.

3. Click the "**X**" on the row that identifies the Timekeeper, Supervisor or Project Manager you want to remove as a delegate.

   A pop-up dialog opens.

4. Click **OK** to remove the delegate. A message confirms that the delegate was removed.

   -OR-

   Click **Cancel** to dismiss the operation.

Reassigning employees to Timekeepers

To assign employees to a different Timekeeper, take these steps:

1. Click **Reassign Employees to Timekeeper** from the Delegates/Reassignment section on the main menu.

   The Add Delegate page opens. A table lists users with the Timekeeper role.

2. Click **Select** on the row that identifies the Timekeeper to whom you want to assign employees.

   The table is refreshed.

3. Click **Select** on the row that identifies the Timekeeper from whom employees will be reassigned.

   A message confirms that the employees were reassigned.

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

Reassigning employees to Supervisors

To assign employees to a different Supervisor, take these steps:

1. Click **Reassign Employees to Supervisor** from the Delegates/Reassignment section on the main menu.

   The Add Delegate page opens. A table lists users with the Supervisor role.

2. Click **Select** on the row that identifies the Supervisor to whom you want to assign employees.

   The table is refreshed.

3. Click **Select** on the row that identifies the Supervisor from whom employees will be reassigned.

   A message confirms that the employees were reassigned.

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

Sending Messages

HR Administrators may send messages to employees. To send a message to one or more employees, take these steps:

1. Click **Select Employees** on the main menu.

   The Select Employees page opens.

2. Click the check box next to the employee name(s).
3. Select **Send Message** from the Send Messages action menu.

   The Send Message page opens and the names you selected are listed in the Recipients field.

4. Type a message subject, click the cursor in the Body field, and type the message.
5. Optionally, click the **High Importance link** to enable or disable the High Importance icon. (The icon darkens when enabled and dims when disabled.)
6. Click **Send Message**.

   A confirmation appears.

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

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
- Remarks
- Leave requests and status
- Premium pay requests and status
- Leave data
- Continuation of pay data (if license is enabled)
- Timesheet profile data
- Labor distribution data (if license is enabled)
- Case tracking (if license is enabled)
- Activity log of actions taken by other roles

Opening and printing Timesheet Summaries

To open and print timesheet summaries, take these steps:

1. Click **Select Timesheets** on the main menu.

   The Select Timesheets page opens.

2. Click the **check box** on the row that identifies the employee(s), and then select **Timesheet Summary** from the Timesheets action menu.

   The Timesheet Summary page opens.

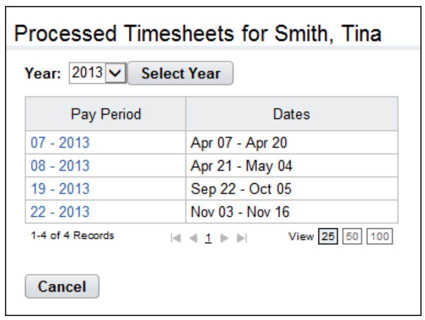
3. Click **Printable Version** at the bottom of the page.

   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 **Select Timesheets** on the main menu.

   The Select Timesheets page opens.

2. Click the **check box** on the row that identifies the employee(s), and then select **Processed Timesheets** from the Timesheets action menu.

   The Processed Timesheets page opens.

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

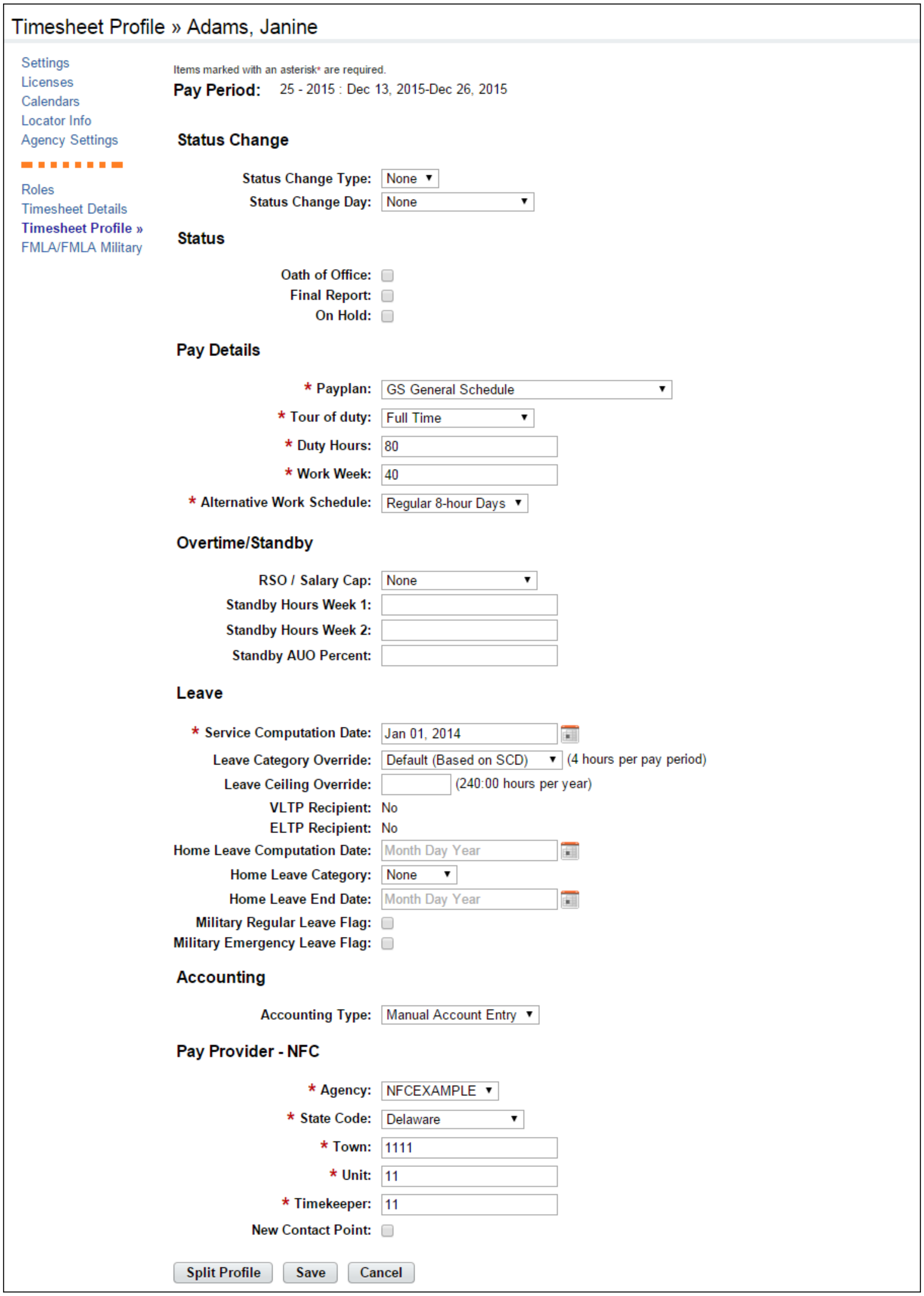
4. Click the **Pay Period link** on the row that identifies the processed timesheet you want to view.

   The Timesheet Summary page opens.

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

Timesheet Profiles

The information on the Timesheet Profile page identifies an Employee's basic payroll profile. Employees must be assigned a timesheet profile in order to access their timesheets. An example Timesheet Profile page is shown below.



The Timesheet Profile includes the following sections: Status Change, Status, Pay Details, Overtime/ Standby, Leave, Accounting, and Pay Provider. Each section is described below in more detail.

Pay Period

- **Pay Period**. The pay period to which the timesheet profile corresponds.

Status Change

- **Status Change Type** - Indicates the type of status change for split Timesheet Profiles. The field is required for dual timesheet assignments for changes made in the middle of the pay periods.
- **Status Change Day -** Indicates the day in the two week pay period when the status starts or ends.

Status

- **Oath of Office** - Identifies an Employee who is new to the agency. This also identifies the Employee's first timesheet reported.
- **Final Report -** Indicates that this is the last timesheet report that is being sent for the Employee.
- **On Hold** - Indicates that no timesheet data will be transmitted to NFC for payroll processing for the Employee.

Pay Plan

- **Pay Plan -** Identifies the Employee's pay plan.
- **Tour of Duty -** Indicates if an Employee is full time, part time, or intermittent.

  ***NOTE**: To satisfy OPM guidelines for Phased Retirement, a new tour of duty (Phased Retirement), 35 transaction codes and relevant exceptions and restrictions are available in webTA. The new transaction codes are restricted for use by employees assigned to the Phased Retirement tour of duty, also referred to as Work Schedule - R. A timesheet validation warning alerts employees if they exceed the tour of duty hours.*

- **Duty Hours -** Displays the total number of biweekly hours that the Employee is expected to work.
- **Work Week-** Defines a typical work week for an Employee.
- **Alternative Schedules -** Indicates if the Employee is assigned to an alternate work schedule (ex.5/4/9 Schedule, Variable Workday, etc.)

Overtime/Standby

- **RSO/Salary Cap** - Identifies regularly scheduled overtime settings for the Employee.
- **Standby Hours Week 1 -** Indicates an Employee's entitlement to premium pay for standby duty in week 1.
- **Standby Hours Week 2** - Indicates an Employee's entitlement to premium pay for standby duty in week 2.
- **Standby AUO Percent -** Defines the applicable percentage for the number of hours of standby used in week 1 and week 2 or the Administratively Uncontrollable. Overtime (AUO) percentage for this Employee.

Leave

- **Service Computation Date** - Used to calculate the leave accrual category.

  ***NOTE**: Updates to the Service Computation Date (SCD) carry forward to all subsequent timesheet profiles. The change may affect the Timesheet Profile status. If the profile status is Validated, the status reverts to Saved. If the profile status is Certified or Processed, the status remains the same.*

The new Service Computation Date and changes to the profile status are captured in the Action Log in the Timesheet Summary. Leave accruals are calculated based on the updated SCD.

- **Leave Category Override** - Establishes the accrual category override that is not dependent on the SCD.
- **Leave Ceiling Override -** Specifies the leave ceiling that overrides the default leave ceiling for the Employee.
- **Home Leave Computation Date - I**ndicates the start date for an Employee to participate in the home leave accrual program.
- **Home Leave Category -** Establishes the amount of home leave an Employee will accrue per pay period.
- **Home Leave End Date** - Indicates the end date for participation in the home leave accrual program.
- **VLTP Recipient** - Indicates the employee is a recipient of hours from the voluntary leave transfer program (VLTP).
- **ELTP Recipient** - Indicates the employee is a recipient of hours from the emergency leave transfer program (VLTP).
- **Military Regular Leave Flag** - Indicates that the employee is entitled to military regular leave and generates the automatic accrual.
- **Military Emergency Leave Flag** - Indicates that the employee is entitled to military emergency leave and generates the automatic accrual.

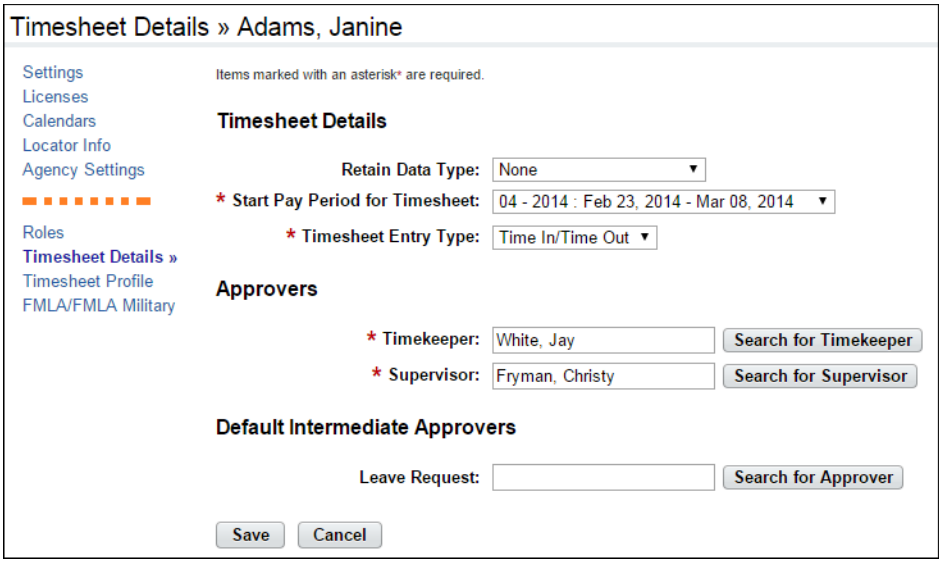
Accounting

- **Accounting Type** - If the agency has implemented accounting, time in pay and dollar transactions must have an accounting code associated with them. Each agency may specify the method of entry for account information in the employee's timesheet. The following options are available:
  - **Manual entry**. The employee selects an account for each line of time in pay and dollar transactions.
  - **Local**. The employee selects an account that is stored locally in webTA rather than at NFC. webTA then includes the accounting data in the transmission file to NFC. This option is useful for agencies that want to generate reports from webTA that are based on account codes, but have set accounts for employees.
  - **Stored**. The employee selects an account that is stored at NFC. This option is useful for agencies in which all time in pay and dollar transactions are charged to the same account.

Pay Provider NFC

- **Agency** - The agency that the employee's Timekeeper is assigned to. This data is populated from the Timekeeper's timekeeper profile.
- **State Code -** The state that the employee's Timekeeper is assigned to. This data is populated from the Timekeeper's timekeeper profile.
- **Town** - The town that the employee's Timekeeper is assigned to. This data is populated from the Timekeeper's timekeeper profile.
- **Unit** - The unit that the employee's Timekeeper is assigned to. This data is populated from the Timekeeper's timekeeper profile.
- **Timekeeper** - The Timekeeper's ID. This data is populated from the Timekeeper's timekeeper profile.
- **New Contact Point -** Whether the contact information has been updated.

Additional information related to the timesheet profile is located on the Timesheet Details page, shown below:



The Timesheet Details page includes these options:

Retain Data Type *-These options determine what data, if any, will be used to populate new timesheets.*

- **None**. New timesheets are blank.
- **Entries Only – No Times**. Work entries from the previous pay period's timesheet are copied into the employee's timesheet when the new pay period begins; hours are not carried over. For example, if the employee selected Regular as the transaction code and accounting code in the previous pay period, the new timesheet would contain these entries; it would not include any hours.
- **All**. Work entries and hours from the previous pay period's timesheet are copied into the employee's timesheet when the new pay period begins; hours are carried over. For example, if the employee selected Regular as the pay code in the previous pay period, the new timesheet would contain these entries; it would also include hours.
- **Pay from Schedule**. Work entries and hours from the schedule are copied into the employee's timesheet when the new pay period begins. For example, if the schedule is set up with Regular Time, and daily 8:30 a.m. start times, 30 minute meals, and 5:00 p.m. stop times, the TITO timesheet is populated with the same work and time entries.

  If the employee's actual work or time entries differ from the schedule entries, the employee may edit the timesheet so that the actual work or time entries are recorded.
- **Exception Processing**. Work entries and hours from the default schedule are copied into the employee's timesheet when the new pay period begins. For example, if the default schedule contains 80 hours of Regular Time, the hourly timesheet is populated with the same work and time entries.

  If the employee's actual work or leave time entries differ from the default schedule, the employee must record the deviation (also called an "exception") directly in the timesheet. The entries from the default timesheet will be automatically adjusted. For example, if Monday contains 8 hours of Regular Time from the default schedule, and the employee enters 4 hours of Annual Leave, the Regular Time entry is reduced from 8 hours to 4 hours, maintaining a total of 8 hours for the day.

- **Start Pay Period for Timesheet** - The starting pay period in which the timesheet will be available. The default is the current pay period. A previous pay period or the current pay period may be specified.
- **Timesheet Entry Type**.
  - Hours. Specify hours for duration-based time entries.
  - No timesheets. Specify this option if the employee does not use a timesheet.
  - Time In/Time Out. Specify this option for punch-based time entries.
- **Approvers** - These options designate who will validate and certify the employee's timesheet.
  - **Timekeeper**. The timekeeper to whom the employee is assigned. Click Search to locate the timekeeper's name. The Select User page opens. Click Select to assign the timekeeper. The name is entered in the Timekeeper field on the Timesheet Details page.
  - **Supervisor**. The supervisor to whom the employee is assigned. Click Search to locate the supervisor's name. The Select User page opens. Click Select to assign the supervisor. The name is entered in the Supervisor field on the Timesheet Details page.
- **Default Intermediate Approvers** - These options designate who will respond, by default, as intermediate approvers to leave or premium pay requests.
  - **Leave Request**. The intermediate approver who will, by default, respond to leave requests. Click **Search for Approver** to locate the intermediate approver's name. The Select User page opens. Click **Select** on the row that identifies the approver. You return to the previous page and the name appears in the field.
  - **Premium Pay Request**. The intermediate approver who will, by default, respond to premium pay requests. Click **Search for Approver** to locate the intermediate approver's name. The Select User page opens. Click **Select** on the row that identifies the approver. You return to the previous page and the name appears in the field.

To enter timesheet details, take these steps:

1. Click **Select Employees** or **Select Timesheets** on the main menu.

   The page opens.
2. Click the **User ID link** of the employee you want to work with.

   - OR -

   Click the check box on the row that identifies the employee and then select **Employee Profile** from the Profiles and Settings menu.
3. Click **Timesheet Details** from the menu on the left side of the page.

   The Timesheet Details page opens.
4. Update or review the information.
5. Click **Save** and then click **Cancel** to go back to the previous page.

Editing timesheet profiles

HR Administrators may manually update timesheet profiles so that the system considers the profile valid and the timesheet can be used. To update a timesheet profile, take these steps:

1. Click **Select Employees** or **Select Timesheets** on the main menu.

   The page opens.

2. Click the **User ID link** of the employee whose timesheet profile you want to work with.

   - OR -

   Click the check box on the row that identifies the employee and then select **Employee Profile** from the Profiles and Settings menu.
3. Update the information.
4. Click **Save** and then click **Cancel**.

Splitting timesheet profiles

If an Employee's profile changes on a non-pay period boundary, use the Split Profile option to update the profile with the change. To split a timesheet profile, take these steps

1. Click **Select Employees** or **Select Timesheets** on the main menu.

   The page opens.
2. Click the **User ID link** of the employee whose timesheet profile you want to work with.

   - OR -

   Click the check box(es) on the row that identifies the employee(s) and then select **Employee Profile** from the Profiles and Settings action menu.
3. Click **Split Profile** near the bottom of the page.

   Two versions of the profile are displayed side-by-side. The original profile appears on the left. The new version appears on the right.
4. From the **Starting Date of New Status** drop-down list, select the date that the new status will begin.
5. Make additional changes to the new version of the profile.
6. Click **Save**.
7. Optionally, click **UnSplit**.

   IMPORTANT! *If **Unsplit** is clicked before **Save**, any changes made to the Split Timesheet Profile page, including status change information, will be lost.*

Leave Balances

HR Administrators may view or adjust leave balances. The Leave Balances page lists leave balances for each leave type for which an employee is eligible. A partial sample Leave Balances page is shown below:

Leave Balances for Clark, Alex

1 of 3

Balances for pay period: 25 - 2012 : Dec 02, 2012 - Dec 15, 2012 **Go**

Accrual Leave Balances

Leave Type	Forward	Adj Forward	Accrued	Used	Expired	Adjustments	Capped	Balance	EOY Balance	EOY Use or Lose
Annual Leave	18:00	18:00	6:00	0:00	0:00	0:00	0:00	24:00	35:00	35:00
Unapplied Annual Leave Hours	0:00	0:00	2:00	0:00	0:00	0:00	0:00	2:00	9:00	0:00
Sick Leave	12:00	12:00	4:00	0:00	0:00	0:00	0:00	16:00	23:00	0:00

To view details about each leave type or to make a manual adjustment, click the **leave type name link**. The Details page opens, shown below.

Details of Annual Leave for Clark, Alex

Leave Balance Details

Pay Period	Date	Adjustment Type	Amount	Balance	Expiration Date
01-2013	01/26/2013	Timesheet Accrual	0:00	0:00	
01-2013	01/26/2013	Timesheet Accrual	0:00	0:00	
27-2012	01/12/2013	Ceiling Rule Cap	-35:00	0:00	
27-2012	01/12/2013	Timesheet Accrual	5:00	0:00	
26-2012	12/29/2012	Timesheet Accrual	6:00	30:00	
25-2012	12/15/2012	Timesheet Accrual	6:00	24:00	
24-2012	12/01/2012	Timesheet Accrual	6:00	18:00	
23-2012	11/17/2012	Timesheet Accrual	6:00	12:00	
21-2012	10/20/2012	Timesheet Accrual	6:00	6:00	

1-9 of 9 Records 1 View 25 50 100

Add Manual Forward Adjustment **Cancel**

Viewing employee leave balances

To view leave balances for employees, take these steps:

1. Click **Select Employees** or **Select Timesheets** on the main menu.

   The page opens.

2. Click the check box next to the employee name(s) you want to work with.

3. Select **Timesheet Summary** from the Timesheets action menu. The Timesheet Summary page opens. Scroll down to the Leave Data section to view leave balances. Click **Cancel** to go back to the previous page.

   - OR -

   Select **Leave Balances** from the Leave and Premium Pay action menu.

   The Leave Balances page opens.

4. To view the leave balances for a pay period other than the current one, select the pay period from the **Balances shown for pay period** drop-down menu and click **Select Pay Period**.
5. To view details about a specific type of leave, click the **leave type name link** in the Leave Type column.

   The Details of Leave page opens. Click **Cancel** to go back to the previous page.

Adjusting employee leave balances

To manually adjust an employee’s leave balance, take these steps:

1. Click **Select Employees** or **Select Timesheets** on the main menu.

   The page opens.
2. Click the check box next to the name of the employee(s) you want to work with.
3. .Select **Leave Balances** from the Leave and Premium Pay action menu.

   The Leave Balances page opens.
4. Click the **leave type name link** that you want to adjust.

   The Details of Leave page opens.
5. Click **Add Manual Forward Adjustment**.

   The Adjust Forward Balance page opens.
6. Click the **Pay Period** drop-down list and select the pay period in which the adjustment will take place.
7. Type the new balance in the Adjusted Forward Balance field.
8. Click **Save** and then click **Cancel** to go back to the previous page.

About COP Balances

If the Continuation of Pay (COP) module is implemented at your agency, you may view COP events and balances. Here is a brief overview of the COP workflow.

The COP Administrator creates a COP event in webTA for eligible employees. 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.

Viewing COP events

To view COP recipient accounts, take these steps:

1. Click **COP Events** from the Continuation of Pay (COP) section on the main menu.

   The COP Events page opens.
2. Click the **employee name link** on the row that identifies the event you want to view.

The COP Event Details page opens.

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

Viewing employee COP balances

To view COP leave balances, take these steps:

1. Click **Select Employees** or **Select Timesheets** on the main menu.

   The page opens.

2. Click the check box next to the employee you want to work with.

3. Select **Timesheet** from the Timesheets menu. The timesheet opens. Click the **Leave Balances tab** to view COP leave balances.

   - OR -

   Select **Timesheet Summary** from the Timesheets menu. The Timesheet Summary opens. COP hours appear in the Timesheet section, the Leave Data section and the Continuation of Pay section

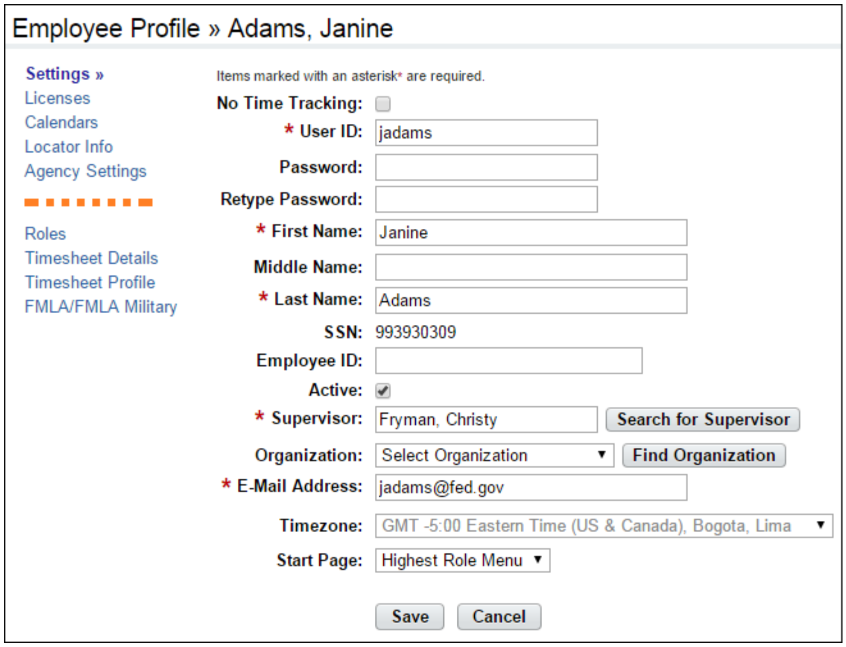
   - OR -

   Select **Leave Balances** from the Leave and Premium Pay menu. The Leave Balances page opens. COP hours appear in the Accrual Leave Balances table; to see details, click the **COP Occurrence name link**. The Details page opens with the Leave Balance Details table.

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

Working with Employee Profiles

Every user has a core employee record in webTA, referred to as the employee profile. It includes user settings, webTA licenses, the agency calendar, locator information, and settings specific to the agency. A sample Employee Profile is shown below.



__NOTE__: Depending on which licenses are enabled for the user, the options that appear on the left side of the page may vary. For example, if the webTA license is enabled, the Roles, Timesheet Details and Timesheet Profile options appear. If the Case Tracking module license is enabled, the Case Tracking option appears. If the Labor Distribution module license is enabled, the Labor Distribution option appears.

Employee Profile page contents--Settings page

- **No Time Tracking**. The user does not use webTA to record time and attendance on their own behalf, rather they monitor and direct the work of other employees to ensure that tasks are being done correctly. Users who have No Time Tracking enabled are classified as employees in the system, but do not have timesheets or other T&A options such as schedules, leave balances, or timesheet profiles. The user may be assigned one or more roles and may perform any of the functions related to the roles.
- **User ID** -The login ID for the employee.
- **Password** - The employee’s password for logging on to the system.
- **Name fields**. The employee's first, middle and last name. The system displays the Last Name exactly as it is entered or imported, including suffixes with upper or mixed case characters.
- **SSN** -The employee’s social security number. When entering an SSN number, the dashes between the 3 parts of the social security number are not required.
- **Employee ID** -A secondary ID that the agency may use for employees.
- **Active** - Indicates whether the employee is active (that is, eligible to use webTA) or inactive. When employees are inactivated, none of their records are deleted from the system, but they will no longer be able to log into the system, and their records are ignored during verification, certification, and transmission file builds.

- **Essential** - If the Emergency Contact Management license is enabled, use the Essential check box to identify whether the employee should be classified as “essential” under special work conditions.
- **Supervisor** - The employee's Supervisor. (To use the Search option, type the Supervisor's last name in the Search field and then click Search.)
- **Organization** - The employee's organization. (Click **Find Organization** to open a list of organizations and sub-organizations.)
- **E-mail Address** -This is the e-mail address that the employee has been assigned so they can send and receive webTA messages from the designated e-mail application.
- **Timezone** - The time zone in which the employee is located.
- **Start Page** - Specify the default role for the main menu, if the employee is assigned more than one role.

Licenses page contents

The Licenses page lists all webTA licenses to which the employee may be given access. To enable licenses, take these steps:

1. Click **Licenses** from the Employee Profile Settings menu.

   The Licenses page opens.

2. Click the check box next to each license that the employee will use.
3. Click **Save**.

   ***NOTE**: Depending on which licenses are enabled, different options may appear. For example, if the webTA license is enabled, the Timesheet Profile and Timesheet Details options appear on the left side of the page. If the webTA Case Tracking license is enabled, the Case Tracking profile option appears on the left side of the page.*

Calendar page contents

The Calendars page lists holiday calendars or unfunded mandate calendars that may be assigned to the employee.

To assign a calendar, take these steps:

1. Click **Select Employees** on the main menu.

   The Select Employees page opens.

2. Click the check box on the row that identifies the employee, and then select **Employee Profile** from the Profiles menu.

   The Employee Profile opens.

3. Click **Calendar** from the menu list on the left side of the page.

   The Calendar page opens.

4. Click the check box on the row that identifies the calendar you want to assign to the employee.

   - OR -

   Clear the check box to remove the assignment.

5. Click **Save**.

Locator page contents

The Locator page contains the employee's work address, phone, cell, pager, and fax information.

To add locator information, take these steps:

1. Click **Select Employees** on the main menu.

   The Select Employees page opens.

2. Click the check box on the row that identifies the employee, and then select **Employee Profile** from the Profiles menu.

   The Employee Profile opens.

3. Click **Locator Info** from the menu list on the left side of the page.

   The Locator Info page opens.

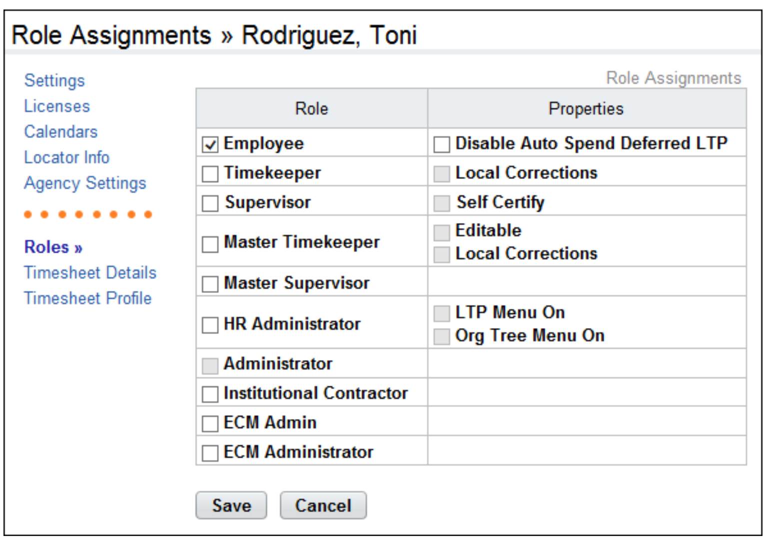
4. Complete the fields.
5. Click **Save**.

Agency Settings page contents

The Agency Settings page contains information unique to the agency.

Role Assignments page contents

The Role Assignments page designates the role that the user will be assigned in webTA. An example Role Assignments page is shown below:



You may also enable or disable the following optional properties for the Employee, Timekeeper, Supervisor, Master Timekeeper and HR Administrator roles:

- **Employee property**
  - **Disable Auto Spend Deferred LTP**. Disables the employee from automatically using LTP hours that have been deferred.

- **Timekeeper property**
  - **Local Corrections**. Gives the Timekeeper the ability to make corrections to timesheets; the corrections are strictly for agency purposes and will not be transmitted for processing by NFC.
- **Supervisor property**
  - **Self-Certify**. Gives the Supervisor the ability to certify his or her own timesheet.
- **Master Timekeeper properties**
  - **Editable**. Gives the Master Timekeeper the ability to edit user profile and timesheet data. If this property is not checked, the Master Timekeeper will have read-only access to the data.
  - **Local Corrections**. Gives the Master Timekeeper the ability to make corrections to timesheets; the corrections are strictly for agency purposes and will not be transmitted for processing by NFC.
- **HR Administrator properties**
  - **LTP Menu ON**. Gives the HR Administrator access to the Leave Transfer Program Management menu, which includes options to work with leave transfer program accounts, recipients, donations and deductions.
  - **Org Tree Menu ON**. Gives the HR Administrator access to the Organization Management menu, which includes options to add, move, edit and delete organizations and sub-organizations.

Adding employees

To manually add an employee to the system, take these steps:

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

   The Employee Profile >> New User page opens.

2. Type a **User ID** for the new employee.

   NOTE*: The format of the user ID and password may vary by agency. As needed, see agency guidelines on creating user IDs and passwords.*

3. Type a **Password** for the employee.

4. Type the password in the **Retype Password** field.

   IMPORTANT*! The employee profile will not be saved unless the contents of the Password and Retype Password fields are the same.*

5. Complete the remaining fields. Required fields are marked with an asterisk. The Active check box must be enabled in order for the new user to be able to log in to the system.

6. Click **Save** when the information is complete.

   A message confirms that the profile was successfully saved. Additional options such as Licenses, Holiday Calendar, and Roles.

7. Continue specifying additional information.

   -OR-

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

Viewing employee profiles

To view an existing employee profile, take these steps:

1. Click **Select Employees** or **Select Timesheets** on the main menu.

   The page opens.

2. Click the check box on the row that identifies the employee, and then select **Employee Profile** from the Profiles and Settings action menu.

   The Employee Profile page opens.

3. Click options from the menu list on the left side of the page to view additional information.
4. Click **Cancel** to go back to the previous page.

Resetting user passwords

To reset a user's password, take these steps:

1. Click **Select Employees** or **Select Timesheets** on the main menu.

   The page opens.

2. Click the check box on the row that identifies the employee, and then select **Employee Profile** from the Profiles and Settings action menu.

   The Employee Profile opens.

3. Type the new password in the **Password** field.

   ***NOTE**: The format of the user ID and password may vary by agency.*

4. Type the new password in the **Retype Password** field.

   ***IMPORTANT**! The employee profile will not be saved unless the contents of the New Password and Retype New Password fields are the same.*

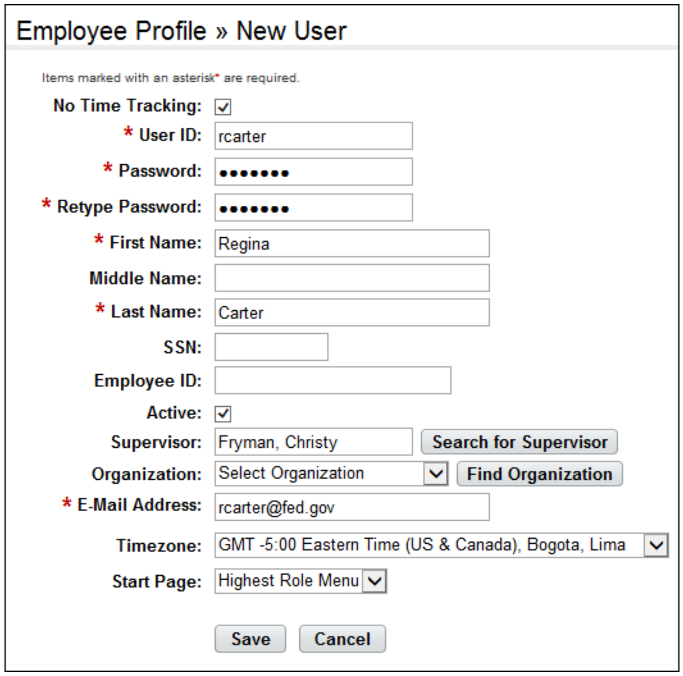
5. Click **Save**. A message confirms that the profile was updated.

   ***NOTE**: The next time the user logs in to the system, the Change Password page will open. The user will be required to enter the password that you typed in their employee profile, and change it to a new password of their own choosing.*

Adding users who do not track time

The No Time Tracking feature is for users who do not record time and attendance in webTA on their own behalf, rather they monitor and direct the work of other employees to ensure that tasks are being done correctly. They are classified as Employees in the system, but do not have timesheets or other T&A options such as schedules, leave balances, or timesheet profiles. The user may be assigned one or more roles and may perform any of the functions related to those roles.

When you enable the No Time Tracking check box, the Employee Profile > New User page refreshes and removes the Required asterisk next to the SSN, Supervisor, and Time Zone fields. You may complete these fields or skip them. Other features in webTA that are typically used by employees for T&A tracking purposes are also removed. For example, the Employee main menu does not display the Timesheet, Leave Requests, Premium Pay Requests, or Schedules options. Licenses such as webTA Console, webTA SmartTime, and some webTA Federal Apps are not included on the Licenses page.



To add an employee whose only function is to monitor and direct the work of other employees in webTA, take these steps:

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

   The Employee Profile >> New User page opens.

2. Click to enable the **No Time Tracking** check box.

   The Employee Profile > New User page refreshes and removes the Required asterisk next to the SSN, Supervisor, and Time Zone fields.

3. Type a **User ID** for the new employee.

   NOTE*: The format of the user ID and password may vary by agency. As needed, see agency guidelines on creating user IDs and passwords.*

4. Type a **Password** for the employee.

5. Type the password in the **Retype Password** field.

   IMPORTANT*! The employee profile will not be saved unless the contents of the Password and Retype Password fields are the same.*

6. Complete the remaining fields. Required fields are marked with an asterisk. The Active check box must be enabled in order for the new user to be able to log in to the system.

7. Click **Save** when the information is complete.

   A message confirms that the profile was successfully saved. Additional options such as Licenses and Roles appear on the left side of the page.

8. Continue specifying additional information.

   -OR-

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

The following list describes the effects of the No Time Tracking feature for the user for whom it is enabled.

Employee Profile Settings page

- SSN, Supervisor, Time Zone fields are optional.

Employee Profile Licenses page

- The Console, webTA FedPP, webTA FedTC, webTA FedTITO, webTA SmartTime, and webTA TITO licenses are not available.

Employee Profile Calendar page

- The Calendar section does not display.

Employee Profile Roles page

- The Supervisor role property "Self-Certify" does not display on the Roles page.

Timesheet Profile page

- The Timesheet Profile page does not display.

Timesheet Details page

- The Timesheet Details page does not display.

Telework Settings page

- The Telework Settings page does not display.

Labor Distribution Settings page

- The Labor Distribution Settings page does not display.

Case Tracking Settings page

- The Case Tracking Settings page does not display.

Employee main menu page

The options listed below do not display on the Employee main menu:

- Timesheet
- Timesheet Profiles
- Processed Timesheets
- Leave Requests
- Premium Pay Requests
- Leave Balances
- Default Schedules
- Advanced Schedules
- Leave Audit Report
- Telework Request
- Telework Agreement
- Continuation of Pay

- Send Message to Timekeeper
- Accounts
- Leave Donations
- Case Tracking

The user may have access to Employee Emergency Contacts and Intermediate Approver. If the agency implements Employee Emergency Contacts, Intermediate Approvers, webTA FedLPP and/or Advanced Reporting, the user may have access to these functions on the Employee main menu.

Other Details

- HR Administrators and Administrators may search for and access No Time Tracking users from the Select Timesheets page.
- No Time Tracking users are excluded from selection lists for the Schedule Grid View, Schedule List View, Leave Recipient, Leave Donor, COP Details, Reassign to Timekeeper, and Timekeeper Takeover.

Working with Schedules

Depending on your agency's implementation of webTA, two types of schedules may be available: default schedules or advanced schedules.

About default schedules

Default schedules display the transaction code and account to which hours are charged, and a biweekly schedule of work hours. Entries from the default schedule are displayed on the Schedule tab of the employee's timesheet; entries may also be populated in the timesheet cells, if the Retain Data Type in the employee's Timesheet Detail is specified as "Pay from Schedule." Employees may add and maintain their default schedule or the responsibility may belong to the Timekeeper. HR Administrators have view-only access to default schedules.

An example default schedule is shown below:

Default Schedule

Employee: Clark, Alex

Week 1

Date	Transaction	Account	Time In	Time Out	Meal	Shift Total	Daily Total
Sun							
Mon 1/05	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Tue 1/06	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Wed 1/07	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Thu 1/08	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Fri 1/09	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Sat							
					Week 1 Total		40:00

Week 2

Date	Transaction	Account	Time In	Time Out	Meal	Shift Total	Daily Total
Sun							
Mon 1/12	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Tue 1/13	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Wed 1/14	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Thu 1/15	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Fri 1/16	Regular Base Pay - 01		8:30am	5:00pm	0:30	8:00	8:00
Sat							
					Week 2 Total		40:00
					Pay Period Total		80:00

Cancel

Viewing default schedules

To view default schedules, take the following steps:

1. Click **Select Timesheets** on the main menu.

   The Select Timesheets page opens.

2. Click the check box on the row that identifies one or more employees, and then select **Default Schedule** from the Default Schedule action menu.

   The Default Schedule page opens.

3. If more than one schedule is displayed, use the arrow near the top or bottom of the page to view the next default schedule.

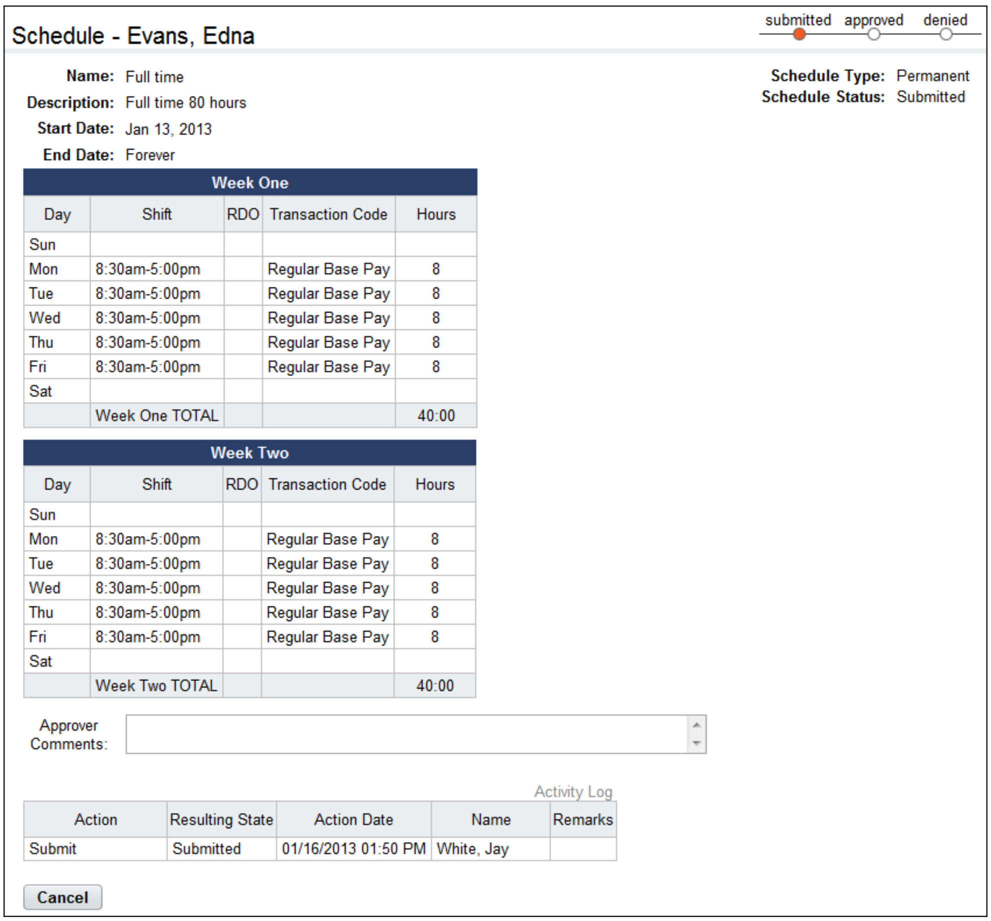
   \- OR -

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

About advanced scheduling

Advanced schedules are similar to default schedules but offer additional features such as Regular Days Off, temporary schedules, flex and core hours bands, additional pay period options, and a Supervisor approval process. Timekeepers maintain and submit advanced schedules on behalf of their employees; Supervisors approve or deny schedule requests. HR Administrators add and assign shifts and schedule templates.

An example advanced schedule is shown below. Notice that the schedule was submitted by the Timekeeper and approved by the Supervisor (see the status bar near the top of the schedule and the entries in the Activity Log near the bottom of the schedule.)



Schedule - Evans, Edna

submitted approved denied

Name: Full time
Description: Full time 80 hours
Start Date: Jan 13, 2013
End Date: Forever

Schedule Type: Permanent
Schedule Status: Submitted

Week One				
Day	Shift	RDO	Transaction Code	Hours
Sun				
Mon	8:30am-5:00pm		Regular Base Pay	8
Tue	8:30am-5:00pm		Regular Base Pay	8
Wed	8:30am-5:00pm		Regular Base Pay	8
Thu	8:30am-5:00pm		Regular Base Pay	8
Fri	8:30am-5:00pm		Regular Base Pay	8
Sat				
	Week One TOTAL			40:00

Week Two				
Day	Shift	RDO	Transaction Code	Hours
Sun				
Mon	8:30am-5:00pm		Regular Base Pay	8
Tue	8:30am-5:00pm		Regular Base Pay	8
Wed	8:30am-5:00pm		Regular Base Pay	8
Thu	8:30am-5:00pm		Regular Base Pay	8
Fri	8:30am-5:00pm		Regular Base Pay	8
Sat				
	Week Two TOTAL			40:00

Approver Comments:

Activity Log

Action	Resulting State	Action Date	Name	Remarks
Submit	Submitted	01/16/2013 01:50 PM	White, Jay	

Cancel

The Advanced Scheduling module includes the following tools:

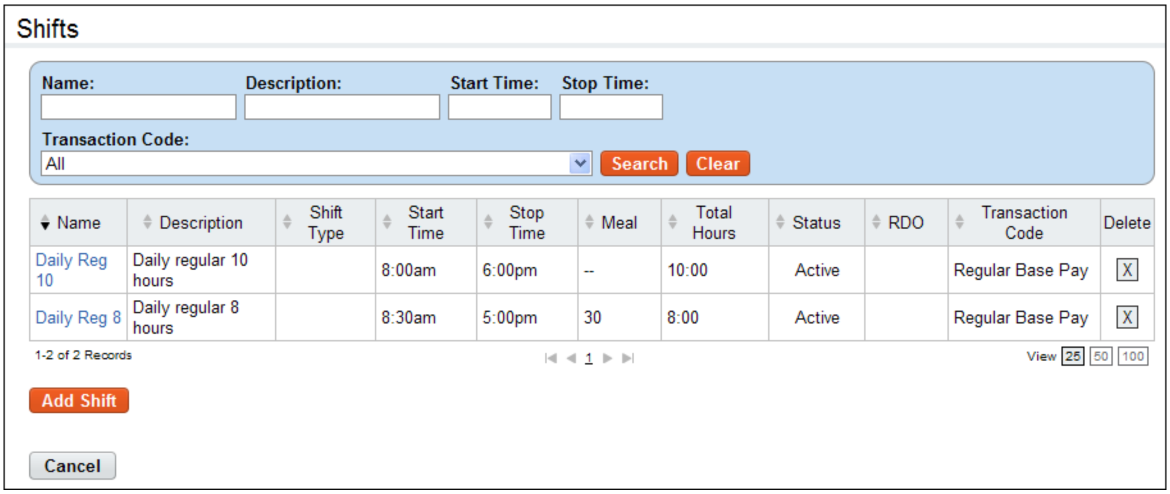
- **Shift**. A shift is the smallest segment of a schedule. The HR Administrator adds shifts and may assign shifts to organizations.
- **Schedule templates**. Schedule templates contain values that the system uses to populate schedules. The HR Administrator adds schedule templates and may assign schedule templates to organizations.
- **Employee Schedules List View**. The Employee Schedules List View displays a high level summary of schedules assigned to employees. The HR Administrator may click user name links to

view employee schedules that have been approved for use in the pay period specified near the top of the page.

Each tool is described below in more detail.

About shifts

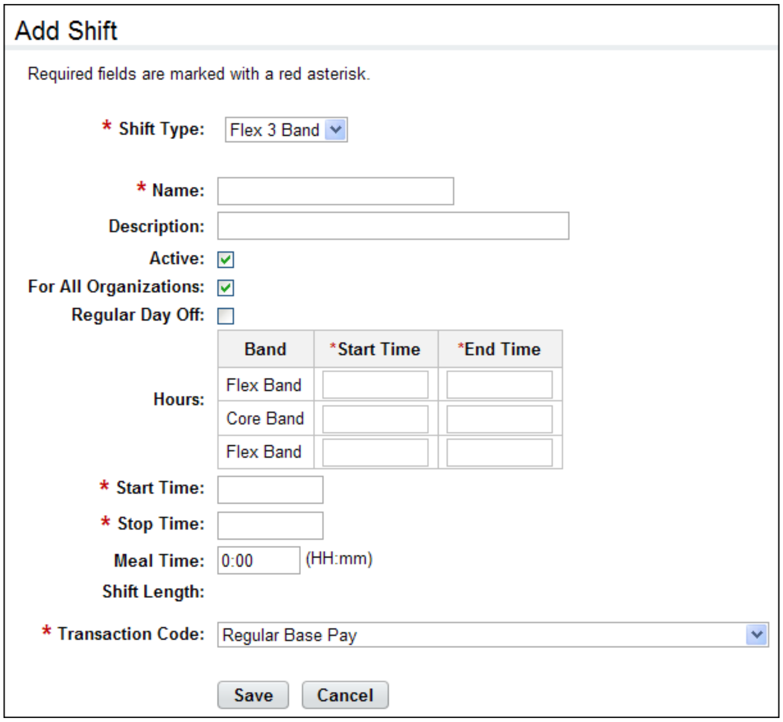
A shift is the smallest segment of time that can be used in a schedule. The HR Administrator adds and maintains a list of shifts as shown on the example Shifts page below:



The page includes these columns

- **Name link**. The shift name. Depending on your role, you may be able to click the name link to view shift details.
- **Description**. A brief description of the shift.
- **Start Time**. The time that the shift begins (HH:MM), for example, 8:00 a.m. NOTE: If the shift is an RDO, enter the same start time and stop time, for example, 8 a.m. This bypasses the mandatory field validation check and results in zero hours.
- **Stop Time**. The time that the shift ends (HH:MM), for example, 4:00 p.m. NOTE: If the shift is an RDO, enter the same start time and stop time, for example, 8 a.m. This bypasses the mandatory field validation check and results in zero hours charged to the transaction code in the timesheet.
- **Meal**. The duration of the meal in minutes, for example, 0:30 minutes.
- **Total Hours**. The total number of hours for the day, for example, 7:30 hours.
- **Status**. Whether the shift is active or inactive. If the shift is inactive, it is not listed as available when assigning shifts to schedules.
- **RDO**. Whether the shift is a Regular Day Off (RDO). NOTE: If the shift is an RDO, you must still enter a Start Time, Stop Time and Transaction Code for the shift.
- **Transaction Code**. The transaction code associated with the shift hours.

The HR Administrator adds shifts from the Add Shift page, as shown in the example below.



Shift page contents

The Shift page includes these fields:

- **Shift Type.**
  - Regular. The shift starts and ends at specific times, for example, 8am - 5pm.
  - Flex 1 Band. The shift is a flexible schedule that does not have core hours.
  - Flex 3 Band. The shift consists of one band of core hours and two bands of flexible hours.
  - Flex 5 Band. The shift consists of two bands of core hours and three bands of flexible hours.

  ***NOTE**: Bands of core hours require the employee to be on duty or present. Bands of flexible hours allow employees to arrive or depart anytime within the band. When totaled, core hours and flexible hours must equal the shift length.*

- **Name**. The shift name.
- **Description**. A brief description of the shift.
- **Active**. Whether the shift is active or inactive. If the shift is inactive, it is not listed as available when assigning shifts to schedules.
- **For All Organizations**.Whether the shift is assigned to all organizations.
- **Regular Day Off**. Whether the shift is a Regular Day Off (RDO).

  ***NOTE**: If the shift is an RDO, you must still enter a Start Time, Stop Time and Transaction Code for the shift.*

- **Hours** (This option appears if the Shift Type is Flex 3 Band or Flex 5 Band.)
  - Flex Band. The employee may arrive or leave anytime during the flex band.
  - Core Band. The employee must be on duty or present during the core band.
- **Start Time**. The time that the shift begins (HH:MM), for example, 8:00 a.m.

__NOTE__: If the shift is an RDO, enter the same start time and stop time, for example, 8 a.m. This bypasses the mandatory field validation check and results in zero hours.

- **Stop Time**. The time that the shift ends (HH:MM), for example, 4:00 p.m.

  __NOTE__: If the shift is an RDO, enter the same start time and stop time, for example, 8 a.m. This bypasses the mandatory field validation check and results in zero hours charged to the transaction code in the timesheet.

- **Meal**. The duration of the meal (HH:MM), for example, 0:30 minutes.
- **Shift Length**. The duration of the shift, for example, 8:00 hours. The system calculates the shift length based on the Start Time, Stop Time and Meal Time. The value is populated by the system.
- **Transaction Code**. The transaction code associated with the shift hours.

Adding or modifying shifts

If an existing shift is assigned to one or more employees or if it is currently being used in a schedule template, you cannot modify it. Unassign the shift first, and then continue working.

To add or modify a shift, take these steps:

1. Click **Shifts** from the Schedule Management section on the main menu.

   The Shifts page opens.

2. To add a shift, click **Add Shift** near the bottom of the page.

   The Add Shift page opens.

   - OR -

   Click the **shift name link** of the shift you want to modify. If the shift is assigned to one or more employees or is being used in a schedule template, the information is read-only. To modify the shift, unassign the shift from employees and schedule templates, and then continue.

   The Shift Details page opens.

3. Click the **Shift Type** drop-down list to select one of the following types of shifts:

   Regular. The shift begins and ends at specific times.

   Flex 1 Band. The shift is a flexible schedule that does not have core hours.

   Flex 3 Band. The shift consists of one band of core hours and two bands of flexible hours.

   Flex 5 Band. The shift consists of two bands of core hours and three bands of flexible hours.

   Depending on the shift type, the page adjusts to display additional fields.

4. Type a name in the **Name** field.
5. Type a brief description in the **Description** field.
6. Accept or clear the check mark in the **Active** box. If the box is cleared, the shift cannot be assigned to a schedule.
7. Accept or clear the **Regular Day Off** check box. If the box is checked, the shift represents a regular day off (RDO).
8. If you selected **Regular** for the shift type, go to the next step.

   - OR -

If you selected **Flex 3 Band** or **Flex 5 Band** for the shift type, enter the Start Time and End Time for each band of hours. The Start Time for each band of core hours must be the same as the End Time for the previous band of flexible hours, otherwise, an error appears and the schedule cannot be saved.

9. Accept or clear the **For All Organizations** check box. If the box is checked, the shift is assigned to all organizations.
10. Type a **Start Time** and a **Stop Time** in hours and minutes.

    ***NOTE**: If the shift is an RDO, enter the same start time and stop time, for example, 8 a.m. This bypasses the mandatory field validation check and results in zero hours.*
11. Type a **Meal** in hours and minutes (duration).
12. The system calculates the Shift Length based on the Start Time, Stop Time and Meal. The field is read-only.
13. Select a transaction code from the **Transaction Code** drop-down list.
14. Click **Save** and then click **Cancel** to go back to the previous page.

Assigning shifts to organizations

To assign a shift to an organization, take the following steps:

1. Click **Assign Shift** from the Schedule Management section on the main menu.

   The Assign Shift page opens.
2. Click **Assign Organizations** on the row that identifies the shift.

   The Assigned Organizations to Shift page opens. A table lists organizations that are currently assigned to the shift.
3. Click **Add Organizations**.

   The Organization Management - Assign Organizations page opens.
4. Click **Select** on the row that identifies the organization you want to assign.

   \- OR -

   Click the **organization name lin**k to view sub-organizations and then click **Select** on the row that identifies the sub-organization you want to assign.

   You return to the Assigned Organizations to Shift page.
5. Assign another organization or click **Cancel** to go back to the previous page.

Unassigning shifts from organizations

To unassign a shift from an organization, take the following steps:

1. Click **Assign Shift** from the Schedule Management section on the main menu.

   The Assign Shift page opens.
2. Click **Assign Organizations** on the row that identifies the shift.

   The Assigned Organizations to Shift page opens. A table lists organizations that are currently assigned to the shift.
3. Click the "**X**" under the Delete column on the row that identifies the organization.

A pop up box opens.

4. Click **OK** to unassign the organization from the shift.

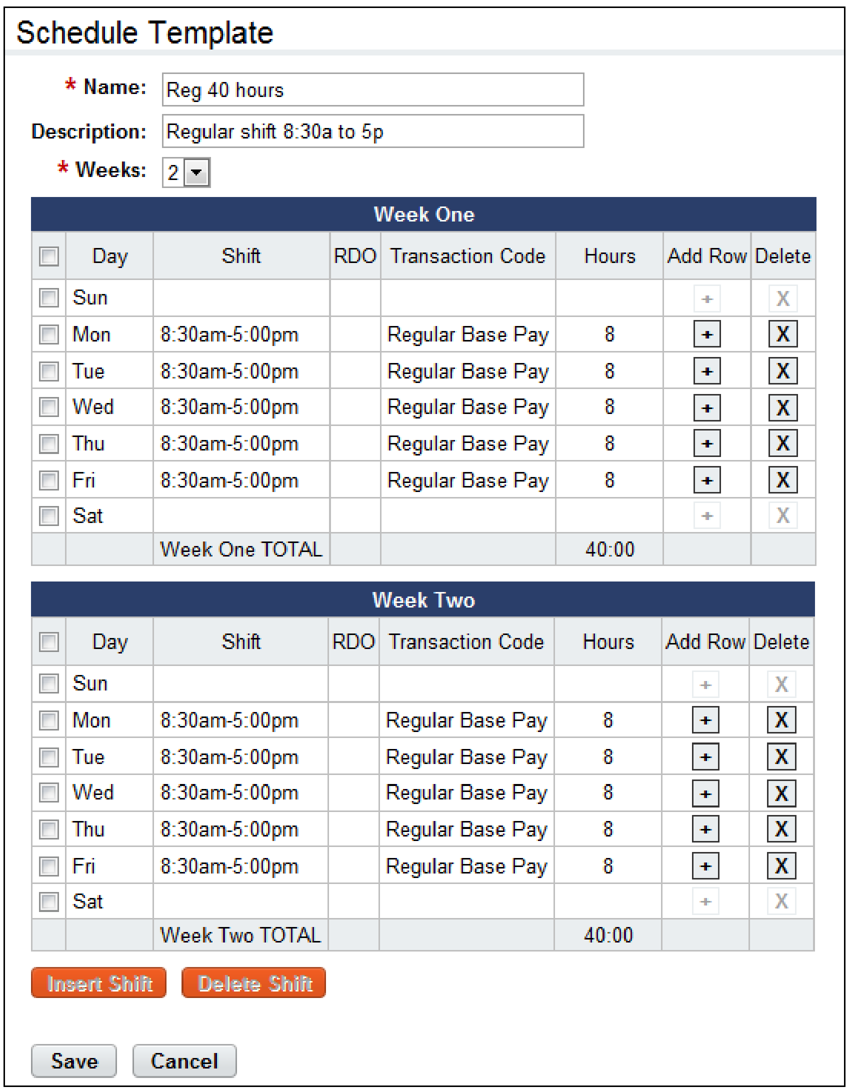
   \- OR -

   Click **Cancel** to cancel the deletion.

About schedule templates

Schedule templates offer a quick, easy way to add permanent or temporary schedules. Schedule templates contain values that Timekeepers may use to populate schedules assigned to employees. Schedule templates eliminate the need to manually create individual schedules for employees. Instead, when a Timekeeper adds a schedule for an employee, they can insert a schedule template to automatically populate the employee's schedule.

The HR Administrator adds and maintains schedule templates. A sample schedule template is shown below.



Adding schedule templates

To add a schedule template, take the following steps:

1. Click **Schedule Templates** from the Schedule Management section on the main menu.

   The Schedule Templates page opens.

2. Click **Add Schedule Template** near the bottom of the page.

   The Schedule Template page opens.

3. Type a schedule template name in the **Name** field.
4. Optionally, type a brief description in the **Description** field.
5. Select the number of weeks from the **Weeks** drop-down menu.
6. Click check boxes next to the days of the week in which you want to insert a shift.
7. Click **Insert Shift**.

   The Insert Shift pop-up box opens.

8. Click the row that identifies the shift and then click **OK**.

   You return to the Schedule Template page and the shift populates the days you identified.

9. Optionally, click the plus sign (+) under the Add Row column to insert another shift on a day that is populated with an existing shift. A second row appears.
10. Click the check box to the left of the row and then click **Insert Shift**. The Insert Shift pop up box opens. Click the row that identifies the shift and then click **OK**.

    You return to the Schedule Template page.

11. Optionally, click the "**X**" under the Delete column to remove a shift.

    - OR -

    Click the check box to the left of the row you want to remove and then click **Delete Shift**.

    The shift is removed.

12. Click **Save** to save the schedule template and return to the Schedule Templates page.

    - OR -

    Click **Cancel** to return to the Schedule Templates page without saving changes.

Assigning schedule templates to organizations

To assign a schedule template to an organization, take the following steps:

1. Click **Assign Schedule Template** from the Schedule Management section on the main menu.

   The Assign Schedule Template page opens.

2. Select a template from the Select Schedule Template drop-down list and then click **Go**.

   The template is selected. If the template has already been assigned to one or more organizations, click the plus (**+**) sign next to the parent organization to view the assigned organizations.

3. Search for and assign the template to a specific organizations, or assign the template to one or more organizations:

- To search for and assign the template to a specific organizations, type the organizations code in the Find Organizations field and click **Search**.

  If the search is successful, the organization is listed under the parent organization. Click the check box next to the organization to assign the template to the organization.

  If the search did not produce results, a message appears. Search again or click **Cancel**.

- To assign the template to one or more organizations, click the plus (**+**) sign next to the parent organization. All organizations to which you have access are listed. Click the check box next to each organization to which you want to assign the template.

4. Click **Save** and then click the **Main Menu link** to go back to the main menu.

   - OR -

   Click **Cancel** to return to the main menu without saving changes.

About the Employee Schedules List View

The Employee Schedules List View page displays employees and their assigned schedules for the specified pay period. Timekeepers may click the employee name link to work with the employee's permanent or temporary schedule.

Opening the Employee Schedules List View

To open the Employee Schedules List View, take these steps:

1. Click **Employee Schedules List View** from the Schedule Management section on the main menu.

   The Employee Schedules List View page opens.

2. Click the **employee name link** of the employee.

   The Schedule Assignment page opens.

3. Depending on your role, click the **schedule name link** to view or respond to the assigned schedule.

   -OR-

   Depending on your role, add a permanent or temporary schedule.

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

Leave Transfer Program Management

The leave transfer program supports voluntary leave transfer accounts, leave bank accounts and emergency leave transfer accounts.

The system tracks these types of transactions associated with each account:

- **Approved recipient**. For an approved recipient to use donated leave, an “event” must be established for that person. An event has a starting and ending date and a limit on the amount of donated leave the recipient may use.
- **Donations to the account**. Donations can be made from within the agency or outside of the agency. Donations may be made by employees or by the HR Administrator on behalf on employees.
- **Deductions from the account**: webTA tracks the balances of the donations and deductions as donations are used. Donations may be made to the recipient’s timesheet after he or she has exhausted all of their annual and sick time.
- **Restored leave**: After an account is closed by the HR Administrator, webTA restores unused leave back to donors.

Adding LTP accounts

To add an LTP account, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the HR Administrator main menu.

   The LTP Management page opens.

2. Click **Add LTP Account**.

   The Add LTP Account page opens.

3. Type an account name in the **Name** field and an accompanying description in the **Description** field.
4. Select the account type from the **Type** drop-down list.
5. Click **Save**.

   The Edit LTP Account page opens. The page contains a summary of the leave account information, the assigned recipient(s), donations, deductions and restored leave.

6. Click **Save**.

Closing LTP accounts

The HR Administrator may either close an LTP account or delete the account. The distinction between closing and deleting an account is as follows:

- Deleting an account removes records from the database.
- Closing an account makes the recipient ineligible to use donated time, and also returns unused donations to the original donor. The unused time is pro-rated.

To close an LTP account, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the HR Administrator

main menu.

The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. Click **Close Account** near the bottom of the page.

   A confirmation message appears.

4. Click **Yes** to close the account.

   - OR -

   Click **Cancel** to dismiss the operation.

Deleting LTP accounts

To delete an LTP account, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.

2. Click the “**X**” on the row that identifies the account you want to delete.

   A message asks you confirm the deletion.

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

   - OR -

   Click **Cancel** to dismiss the operation.

Adding recipients

To add a recipient to an LTP account, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. Click **Add Recipient** under the Recipient table.

   The Select Recipient page opens.

4. Click **Select** on the row that identifies the recipient.

   The LTP Recipient page opens.

5. Enter the **Event** (for example, Self Health.)
6. Enter the recipient's **Position**, **Grade** and **Step**.
7. Enter the **LTP Leave Limit** in hh:mm format. This is the maximum amount of leave that the recipient may use.
8. Click the **Personal** or **Family** radio button to specify whether the emergency applies to the employee or to a family member.

9. Type the **Start Date** or click the **calendar icon** to specify when the recipient may begin using donated leave.
10. Type the **End Date** or click the **calendar icon** to specify when the recipient must stop using donated leave.
11. Click **Save** and then click **Cancel** to go back to the Edit LTP Account page.

Editing recipients

To edit LTP recipient information, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.
2. Click the **account name link** that you want to work with.

   The Edit LTP Account page opens.
3. Click the **recipient name link** in the Recipient table.

   The LTP Recipient page opens.
4. Make changes.
5. Click **Save** and then click **Cancel** to go back to the Edit LTP Account page.

Deleting recipients

To remove a recipient from an LTP account, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.
2. Click the **account name link** that you want to work with.

   The Edit LTP Account page opens.
3. Under the Recipient table, click the “**X**” on the row that identifies the recipient.

   A confirmation message appears.
4. Click **OK** to delete the recipient.

   - OR -

   Click **Cancel** to dismiss the operation.

About donations

Employee donations to leave transfer accounts can either be entered by donating through the Leave/ Premium Pay section on the Employee main menu, or they can be entered by an HR Administrator from the LTP Account page. Either way, the donation must be approved by an HR Administrator before it can be used by an approved recipient.

A recipient cannot use donated leave after the end of the event. The end date of the event may be extended and its maximum hours increased by editing the event record.

The HR Administrator may add donations on behalf of employees, both from within the agency or from external sources.

Adding donations

The HR Administrator may add LTP donations on behalf of employees. To add an LTP donation on behalf of an employee, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. Click **Add Donation**.

   The Select Donor page opens.

4. Click **Select** on the row that identifies the donor.

   The Leave Balances page opens.

5. Click the **leave type name link** that identifies the type of leave the employee may donate.

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

6. Enter the donor's **Position**, **Grade** and **Step**.
7. Enter the number of hours to donate in the Amount field.
8. 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.)
9. Optionally, enter remarks.
10. Click **Save**. A message confirms that the donation was saved.
11. Click **Cancel** to go back to the LTP Account page.

    -OR-

    Click **Approve**, **Reject** or **Delete** to continue with the approval process.

Approving donations

Donations must be approved by the HR Administrator before the recipient can use the donation.

To approve a donation, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. From the **Donations** table, click the name of the donor you want to approve.

   The Edit LTP Donation page opens.

4. Click **Approve**.

   A message confirms the donation or alerts you if there was a problem.

5. Click **Cancel** to dismiss the message and go back to the previous page.

Deleting donations

Donations that have been submitted but not yet approved or rejected may be deleted. To delete a donation from an LTP account, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. Click "**X**" on the row that identifies the donation you want to delete from the LTP account.

   A confirmation pop-up appears.

4. To proceed with the deletion, click **OK**. The donation is deleted

   -OR-

   To dismiss the operation, click **Cancel**.

Rejecting donations

To reject a leave donation, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. From the **Donations** table, click the name of the donor you want to work with.

   The Edit LTP Donations page opens.

4. Click **Reject**.

   A message confirms that the donation is rejected.

5. Click **Cancel** to dismiss the message and go back to the previous page.

Reverting donations to pending

To change the status of an approved or rejected leave donation, take these steps:

1. Click **LTP Management** from the Leave Transfer Program section on the main menu.

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. From the **Donations** table, click the name of the donor you want to work with.

   The Edit LTP Donations page opens.

4. Click **Revert to Pending**.

   A message confirms that the status is reverted.

5. Click **Cancel** to dismiss the message and go back to the previous page.

Organization Management

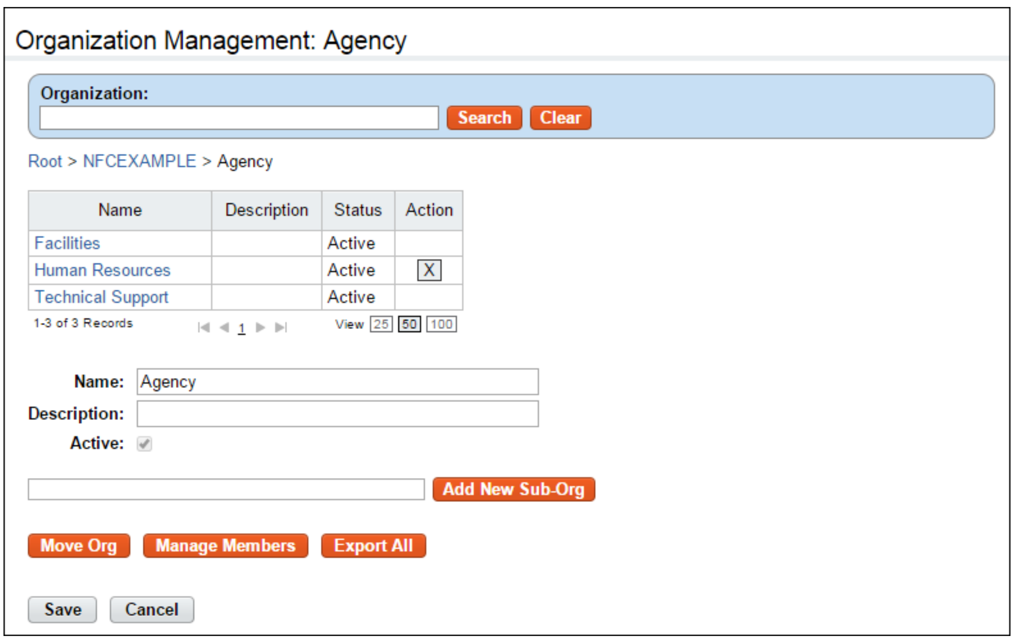
Use the Organization Management function to add, edit, delete or move organizations or sub-organizations, add or remove user members from organizations, and export organization data into an Excel file.

Top level organizations (also referred to as "parent" organizations) typically contain one or more sub-organizations (also referred to as "child" organizations.) When you click a parent organization name link, notice the following changes:

- A navigation "breadcrumb" path appears. The first part of the path is named "Root." Click **Root** to return to the parent organization table anytime.
- The parent organization table is replaced by the sub-organizations table. As you drill down to additional sub-organizations, the breadcrumb path includes links to each previous level.

> ***NOTE****: The organization structure is unique to each agency. The breadcrumb path names will correspond to the names of the organizations and sub-organizations at the agency.*

An example Organization Management <sub-organization name> page is shown below.



Viewing organizations and sub-organizations

To view an organization or sub-organization, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.

2. Click the **organization name link** that you want to view.

   The Sub-Orgs table opens. A navigation breadcrumb path appears directly above the table. The first part of the path is named "Root." Click Root to return to the Organization table anytime.

3. Click a **sub-organization name link** to view a sub-organization.

- OR -

Click **Manage Members** to view users assigned to the organization.

4. Continue to view organizations, sub-organizations and members.

   - OR -

   Click **Root** to return to the Organization Management page.

Adding organizations

To add an organization, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.

2. Type the new organization name in the field next to Add New Org and then click **Add New Org**.

   The organization is added to the Organization Management table.

3. Continue adding organizations.

   - OR -

   Click **Cancel** to return to the Organization Management page.

Deleting organizations

Before you delete an organization, delete or move all sub-organizations and user members assigned to the organization, otherwise, an error message appears. As an alternative, you may inactivate the organization instead of deleting it; the organization can be reactivated later if it is needed in the future.

To delete an-organization, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.

2. Click the "**X**" on the row that identifies the organization. A confirmation message appears. Click **Yes** to delete the organization. To cancel the operation, click **Cancel**.

   - OR -

   If the Delete option is not available, delete or move sub-organizations or user members until the Delete option becomes available, then repeat this step.

3. Click **Root** to return to the Organization Management page.

Inactivating organizations

As an alternative to deleting organizations, you may inactivate the organization; the organization can be reactivated later if it is needed in the future. Before you inactivate an organization, you must first take these steps:

- Remove assigned employees.
- Inactivate sub-organizations.

To inactivate an organization, take these steps:

1. Click **Organization Management** on the main menu.

The Organization Management page opens.

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

   The Organization Management <organization name> page opens. The Name, Description, and Active prompts display.

3. If the Active check box is disabled, you must first remove assigned employees and inactivate sub-organizations.

   -OR-

   If the Active check box is enabled, clear the check box.

4. Click **Save**.

   A message confirms the action.

Adding sub-organizations

To add an organization, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.

2. Click the **organization name link** of the organization to which you want to add a sub-organization.

   The sub-organization table opens. A navigation breadcrumb path appears directly above the table. The first part of the path is named “Root.” Click **Root** to return to the parent organization table anytime.

3. Type the new sub-organization name in the field next to Add New Sub-Org andt hen click **Add New Sub-Org**.

   The sub-organization is added to the table.

4. Continue adding sub-organizations.

   - OR -

   Click **Root** to return to the Organization Management page.

Deleting sub-organizations

Before you delete a sub-organization, delete or move all sub-organizations and user members assigned to the sub-organization, otherwise, an error message appears. To delete a sub-organization, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.

2. Click the **organization name link** that contains the sub-organization you want to delete.

   The sub-organization table opens.

3. Click the "**X**" on the row that identifies the sub-organization. A confirmation message appears. Click **Yes** to delete the sub-organization. To cancel the operation, click **Cancel**.

   - OR -

   If the Delete option is not available, delete or move sub-organizations or user members.

4. When all sub-organizations and user members have been deleted or moved, repeat the previous step.
5. Click **Root** to return to the Organization Management page.

Moving sub-organizations

To move sub-organizations, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.
2. Click the **organization name link** of the organization that contains the sub-organization that you want to move.

   The sub-organization table opens. A navigation breadcrumb path appears directly above the table. The first part of the path is named “Root.” Click **Root** to return to the Organization table anytime.

   As necessary, continue to click sub-organization name links until the sub-organization you want to move appears.
3. Click **Move Org**.

   The Organization Management - Select a new Parent for ... page opens.
4. Click **Select** on the row that identifies the parent organization to which you want to move the selected sub-organization.

   A confirmation message appears.
5. To move the organization, click **Yes**. A message confirms that the sub-organization is now a child of the selected parent organization.

   - OR -

   To cancel the operation, click **Cancel**.
6. Click **Root** to go back to the Organization Management page.

Adding and deleting organization members

To add members to an organization, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.
2. Click the **organization name link** of the organization to which you want to add members.

   The sub-organization table opens. As necessary, continue to click sub-organization name links until the sub-organization to which you want to add members appears.
3. Click **Manage Members**.

   The Manage Members Of ... page opens.
4. Click **Add User**.

   The Select User page opens.
5. Click **Select** next to each user name that you want to add.

   A message confirms that each user was added.

6. When you have finished adding users, click **Cancel**, and then click **Root** to return to the Organization Management page.

To remove members from an organization, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.

2. Click the **organization name link** of the organization from which you want to remove members.

   The sub-organization table opens. As necessary, continue to click sub-organization name links until the sub-organization from which you want to remove members appears.

3. Click **Manage Members**.

   The Manage Members Of ... page opens.

4. Click the "**X**" on the row that identifies the user you want to remove from the organization. A confirmation message appears. Click **Yes** to remove the user. To cancel the operation, click **Cancel**.

   \- OR -

   If the Delete option is not available, delete or move sub-organizations or user members until the Delete option becomes available, then repeat this step.

5. Click **Cancel** to return to the Organization Management page, and then click **Root** to return to the Organization Management page.

Exporting organizations

To export organizations to a CSV delimited Excel file, take these steps:

1. Click **Organization Management** on the main menu.

   The Organization Management page opens.

2. Click the **organization name link** or sub-organization name link that contains the data set to be included in the output file.

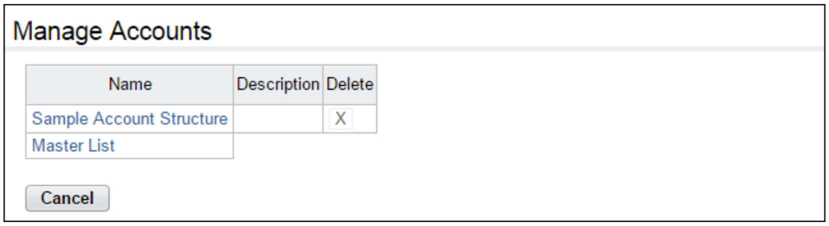
3. Click **Export All**.

   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**.

4. Click **Cancel** to return to the Organization Management page.

Managing Accounts

An account structure is a combination of fields that define how the account values are created, used and transmitted with payroll files. Account structures are unique for each agency and are configured by Kronos Professional Services to meet the agency's needs.



Definition and Example of "Account"

The term *account* is used throughout the webTA application and accompanying documentation as data entered in pre-defined account structure fields and saved as a string. For example, let's say an account structure consists of three fields: Fund, Project, Case Number. A user creates an account with the following values for Fund, Project, and Case Number:

Fund: F01

Project: PN001

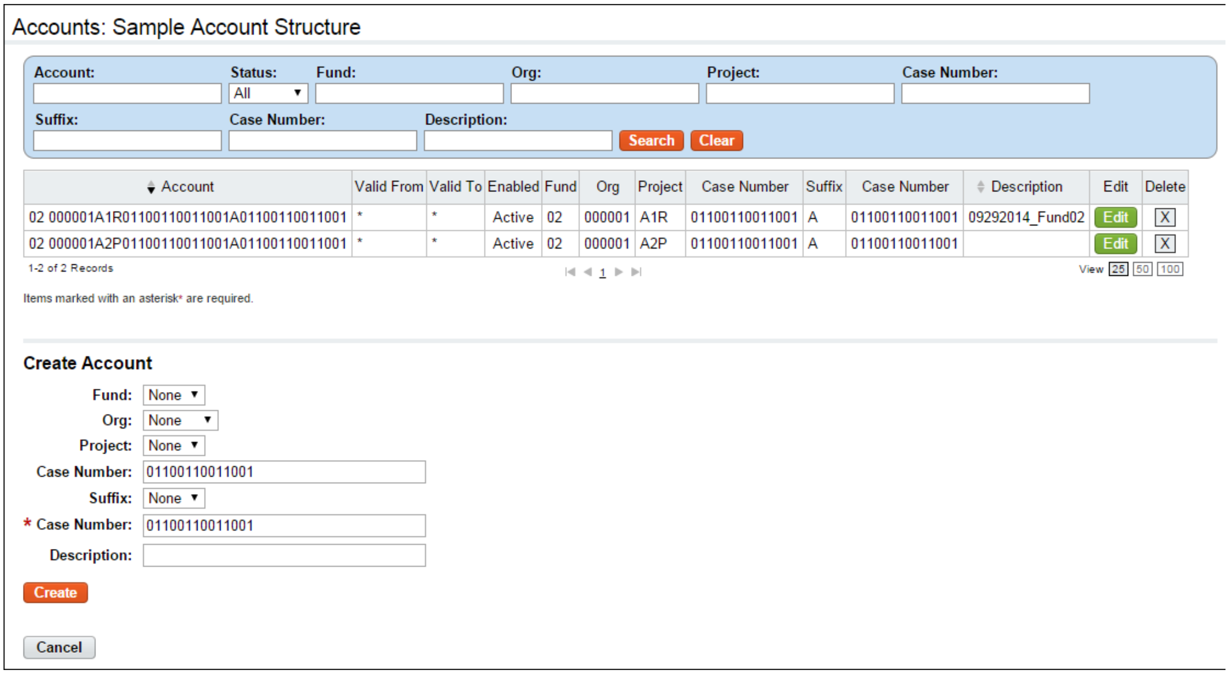
Case Number: CN001

The account that is created is represented by the string **F01PN001CN001**. This is what employees see in timesheets, schedules, projects, dollar requests, and elsewhere. For brevity, instead of "account string", we refer to F01PN001CN001 as "the account."

HR Administrators may perform the following tasks:

- Create, edit, enable, disable, and delete accounts
- Edit the account description
- Specify the account Valid From and Valid To date range
- Specify the account display order
- Add groups, assign groups to accounts, and remove groups from accounts
- View the Master List

An example Accounts: <account name> page is shown below.



Creating accounts

To create an account, take these steps:

1. Click Manage Accounts from the main menu.

   The Manage Accounts page opens.

2. Click the account name link under the Name column.

   If you are the Administrator, the Account Structure page opens. Scroll to the bottom of the page and click Accounts. The Accounts page opens.

   -OR-

   If you are the HR Administrator, the Accounts page opens.

3. Under Create Account, select or enter values. (Depending on your agency, the fields vary.) An asterisk identifies required fields, if any.

4. Click Create.

   The account is added to the table at the top of the page.

5. Add another account.

   -OR-

   Click Cancel to go back to the previous page.

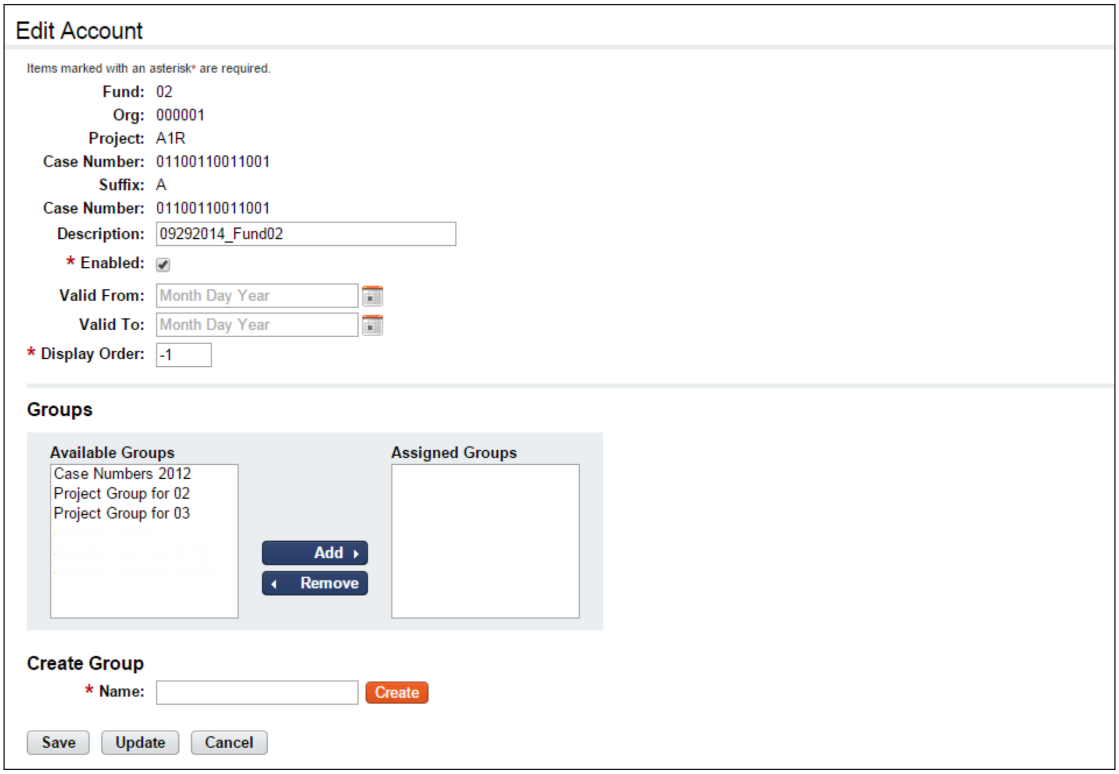
Editing accounts

Administrators and HR Administrators may perform the following tasks on the Edit Account page:

- Edit the account description.
- Enable or disable the account.

- Specify the account Valid From and Valid To date range (also referred to as "end-dating" the account).
- Specify the account display order.
- Add groups, assign groups to accounts, and remove groups from accounts.

An example Edit Account page is shown below.



Edit Account page contents

The fields on the Edit Account page are described below:

- **Description**. The description of the account.
- **Enabled**. This option determines whether the account is active in the system. If the account is disabled, it is no longer available to users but remains in the system. You should only disable an account if it will never be used again. Disabled accounts cannot be used for correction purposes; instead, use a proper end date in the Valid From and Valid To date range.
- **Valid From and Valid To**. The time frame that the system refers to when applying the definition. This option is recommended as an alternative to deleting an account. You can "end-date" the account so that it can only be used for correction purposes and is no longer available to users.

  NOTE*: The dates may be blank and open ended. If your Agency implements a requirement for the Valid To date to be a fiscal year or pay period start date, an asterisk appears next to the field.*

- **Display Order**. Type a positive or negative integer to change the order in which the value is listed.
- **Groups**. A group is an attribute that the Administrator may use when defining restrictions. You may assign the account to an existing group, create a new group, or remove the account from the group.

To edit an account, take these steps:

1. Click **Manage Accounts** from the main menu.

   The Manage Accounts page opens.

2. Click the **account name link** under the Name column.

   If you are the Administrator, the Account Structure page opens. Scroll to the bottom of the page and click **Accounts**. The Accounts page opens.

   -OR-

   If you are the HR Administrator, the Accounts page opens.

3. Make changes, as described above.

   Optionally, assign the account to a group that can be used as an attribute when defining restrictions. You may assign the account to an existing group or create a new group.

   To assign the account to an existing group, click to highlight the group under the Available Groups column and then click the **Add** button to move the group to the Assigned Groups column.

   -OR-

   To add a new group, type a group name in the Name field below Create Group and then click **Create**. The new group appears under the Available Groups column. Click to highlight the group under the Available Groups column and then click the **Add** button to move the group to the Assigned Groups column.

4. Click **Update** to save changes and continue working on the same page.

   -OR-

   Click **Save** to save changes and go back to the previous page.

Deleting accounts

For audit purposes, accounts that have been used anywhere in the system cannot be deleted. The system displays alerts or errors if you try to delete an account that has been used (for example, in a timesheet, schedule, project, dollar request, etc.)

As an alternative to deleting the account, you may specify Valid From and Valid To dates (also referred to as "end-dating" the account) or you may disable the account. See the procedure “Editing accounts” for details.

In rare cases, you may need to delete an account that was accidently entered and has not been used. To delete an account, take these steps:

1. Click **Manage Accounts** from the main menu.

   The Manage Accounts page opens.

2. Click the **account name link** under the Name column.

   If you are the Administrator, the Account Structure page opens. Scroll to the bottom of the page and click **Accounts**. The Accounts page opens.

   -OR-

   If you are the HR Administrator, the Accounts page opens.

3. Click the "**X**" on the row that identifies the account you want to delete. (If the button is disabled, see suggested alternatives above.)

Viewing the account master list

The account master list displays all accounts that have been added to the system: To view the master list, take these steps:

1. Click **Manage Accounts** from the Accounting section on the main menu.

   The Account Structures page opens.

2. Click **Master List** under the Name column.

   The Master List page opens.

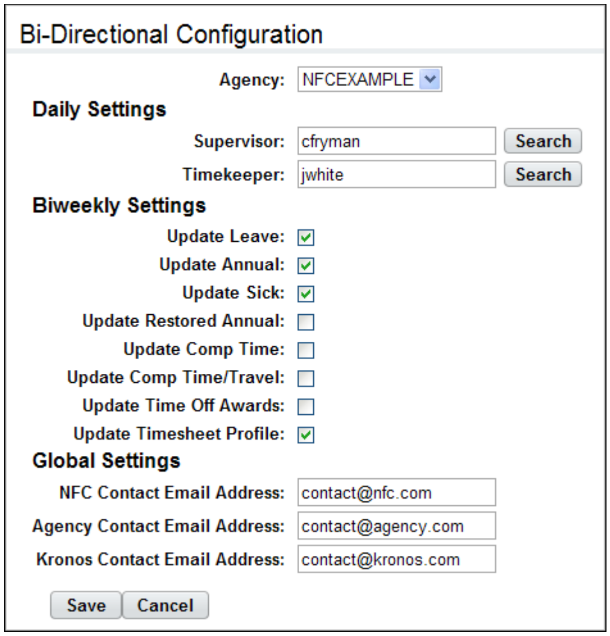
3. Click **Cancel** to go back to the previous page.

System Set Up

Bidirectional Configurations

Use the Bidirectional Configurations function to configure jobs that perform the bidirectional feed of HR and leave data.

> ***IMPORTANT**: Use **Import Job Management** to specify the bidirectional import type (Biweekly or Daily), and schedule and execute bidirectional jobs.*



Bi-Drectional Configuration page contents

- Agency.
- Daily Settings.
  - Supervisor.
  - Timekeeper.
- Biweekly Settings.
  - Update Leave.
  - Update Annual.
  - Update Sick.
  - Update Restored Annual.
  - Update Credit.
  - Update Religious Comp.
  - Update Shore.
  - Update Home.
  - Update Comp Time.
  - Update Comp Time/Travel.

    - Update Time Off Awards.
    - Update Timesheet Profile.
- Global Settings.
    - NFC Contact Email Address.
    - Agency Contact Email Address.
    - Kronos Contact Email Address.

Specifying the bidirectional configuration

To specify bidirectional configuration settings, take these steps:

1. Click **Bidirectional Configurations** on the Administrator main menu.

   The Bi-Directional Configuration page opens.

2. Complete the fields and click **Save**.
3. Click **Cancel** to go back to the previous page.

See the *Reports* section for bidirectional reports.

Running webTA Reports

The following webTA reports are available to HR Administrators:

- Active Timesheets
- Adhoc Report
- Bidirectional Leave Changes
- Bidirectional New Hires
- Bidirectional Profile Audit
- Bidirectional Summary
- Final Timesheets
- New Employees
- Organization Accounts
- Organization Assignment
- Role Assignment
- Supervisor Assignments
- Telework by Employee
- Telework Degree of Participation
- Telework Summary of Hours by Pay Period
- Timekeeper Assignments
- Timesheet Status
- Timesheet Summary
- Unassigned Employees
- Uncertified Timesheets
- Unprocessed Timesheets

***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.

Active Timesheets

The Active Timesheets report lists the active timesheets for all employees that have not been transmitted to the payroll provider. Filter results by employee, timesheet status, unit, state, or user type.

***NOTE**: Missing timesheets are not included in the report criteria.*

To generate the Active Timesheets report:

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

   The Reports page opens.

2. Click **Active Timesheets**.

The page opens:

3. Use the following report parameters:
   - Click the **Pay Period** drop-down list to specify a pay period.
   - Click **Search** next to the Employee field. The Select User page opens. Click **Select** on the row that identifies the employee. You return to the Report Parameters page and the Employee field is populated with the selected name.
   - Click the **Timesheet Status** drop-down list to specify a timesheet status:
     - **All**. Shows all employee timesheets. This is the default.
     - **Saved**. Displays timesheets with the timesheet status Saved.
     - **Pending Attestation**. Displays timesheets that have been saved but not yet validated.
     - **Emp. Validated**. Displays records that have been validated and affirmed by employees.
     - **Tk. Validated**. Displays records that have been validated by Timekeepers.
     - **Both Validated**. Displays records that have been validated by Timekeepers and employees.
     - **Valid. O/R**. Displays records that have had validation overridden.
     - **Approved**. Displays records that have been approved.
     - **Certified**. Displays records that have been both validated and certified but not yet built.
     - **Pre-processed**. Displays records that have been validated, certified, and built.
     - **Corrected**. Displays records that have been corrected.
- Type a two-digit unit code in the **Unit** field.
- Select a state code from the **State** drop-down list.
- Click the **Users** drop-down list to specify a user status:
  - **Active**. Employees are still eligible to use the system.
  - **Inactive**. Employees' records are still in the system, but they no longer have access it.
  - **Active & Inactive**. View both active and inactive employees.

4. 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.

Bidirectional Leave Changes

The Bidirectional Leave Changes report displays leave balance changes during the most recent bidirectional load. The report also displays errors that occurred during the load. To run the Bidirectional Leave Changes report, take these steps:

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

   The Reports page opens.

2. Click the **Bidirectional Leave Changes link**.

   The page opens.

3. Click **Run Report**.

The report output is displayed. To save the report in PDF, Excel, HTML, or CSV format, click the option at the top of the report. 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.

Bidirectional New Hires

The Bidirectional New Hires report displays new hires that were processed during the most recent bidirectional load. The report also displays errors that occurred during the load. To run the Bidirectional New Hires report, take these steps:

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

   The Reports page opens.

2. Click the **Bidirectional New Hires link**.

   The page opens.

3. Click **Run Report**.

   The report output is displayed. To save the report in PDF, Excel, HTML, or CSV format, click the option at the top of the report. 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.

Bidirectional Profile Audit

The Bidirectional Profile Audit report displays timesheet and employee profile changes during the most recent bidirectional load. The report also displays errors that occurred during the load. To run the Bidirectional Profile Audit report, take these steps:

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

   The Reports page opens.

2. Click the **Bidirectional Profile Audit link**.

   The page opens.

3. Click **Run Report**.

   The report output is displayed. To save the report in PDF, Excel, HTML, or CSV format, click the option at the top of the report. 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.

Bidirectional Summary

The Bidirectional Summary report displays a count of records that succeeded, failed or skipped during the most recent bidirectional load. The report also displays errors that occurred during the load. To run the Bidirectional Summary report, take these steps:

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

   The Reports page opens.

2. Click the **Bidirectional Summary link**.

   The page opens.

3. Click **Run Report**.

   The report output is displayed. To save the report in PDF, Excel, HTML, or CSV formTat, click the option at the top of the report. 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.

Final Timesheets Report

The Final Timesheets report lists, by pay period, the last timesheet submitted for employees who are no longer active.

> ***NOTE****: An employee's active status may be enabled or disabled on the Employee Profile Settings page. A check mark in the Active check box indicates that the employee's status is active.*

To generate a Final Timesheets report:

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

   The Reports page opens.

2. Click **Final Timesheets**.

   The page opens:

3. Use the following parameters:

   - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
   - Click the **Users** drop-down list to specify a user status:
     - **Active**. Employees are still eligible to use webTA.
     - **Inactive**. Employees’ records are still in the system, but they no longer have access to webTA.
     - **Active & Inactive**. View both active and inactive employees.

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.

New Employees Report

The New Employees report lists, by pay period, new users who have been added to the system. Depending on your role, new users are limited to your employee group. The report lists the employee name, ID, SSN (if configured), Timekeeper ID and Supervisor ID. New employees are identified by the Oath of Office option selected in their timesheet profile. An employee is considered "new" until a timesheet is included in a build.

To generate a New Employees report:

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

   The Reports page opens.
2. Click **New Employees**

   The page opens:
3. Use the following parameters:
   - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
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.

Organization Assignment

The Organization Assignment report lists users assigned to a given role, by organization.

To generate an Organization Assignment report:

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

   The Reports page opens.
2. Click **Organization Assignment**

   The page opens:
3. Use the following parameters:
   - Select a role from the **Select Roles** drop-down list.

   NOTE*: To select several roles, hold the CTRL-key down. To choose all roles, don't select anything from the drop-down list.*

   - Select an organization.
     - Optionally, accept the default organization.

-OR-

Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link**. The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.

- Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
- Click the **Users** drop-down list to specify a user status:
  - **Active**. Employees are still eligible to use the system.
  - **Inactive**. Employees' records are still in the system, but they no longer have access to the system.
  - **Active & Inactive**. Allows you to view both active and inactive employees.

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.

Role Assignment

The Role Assignment report lists employees assigned to a specific role. To generate a Role Assignment report:

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

   The Reports page opens.
2. Click **Role Assignment**

   The page opens:
3. Use the following parameters:
   - Select a role from the **Role Name** drop-down list.
   - Select an organization.
     - Optionally, accept the default organization.

       -OR-

       Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link**. The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.
   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Click the **Users** drop-down list to specify a user status:
     - **Active**. Employees are still eligible to use the system.
     - **Inactive**. Employees' records are still in the system, but they no longer have access to the system.
     - **Active & Inactive**. Allows you to view both active and inactive employees.
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.

Supervisor Assignments

The Supervisor Assignment report shows which employees are assigned to individual supervisors. To generate a Supervisor Assignments report:

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

   The Reports page opens.

2. Click **Supervisor Assignment**

   The page opens:

3. Use the following parameters:
   - Click **Search** next to the Supervisor field. The Select User page opens. Click **Select** on the row that identifies the Supervisor. You return to the Report Parameters page and the Supervisor field is populated with the selected name.
   - Select an organization.
     - Optionally, accept the default organization.

       -OR-

       Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link**. The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.
   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Click the **Users** drop-down list to specify a user status:
     - **Active**. Employees are still eligible to use the system.
     - **Inactive**. Employees' records are still in the system, but they no longer have access to the system.
     - **Active & Inactive**. Allows you to view both active and inactive employees.
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.

Telework by Employee Report

The Telework by Employee report displays the total hours for any telework timesheet entries. Filter the report output by organization, sub-organization, pay period or telework transaction code.

To generate a Telework Employee by Day report:

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

The Reports page opens.

2. Click **Telework by Employee**.

   The page opens.

3. Use the following parameters:
   - Select an organization:
     - Optionally, accept the default organization.
       -OR-
       Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link**. The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.
   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
   - Select a telework code from the **Transaction Code** drop-down list.

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.

Telework Degree of Participation

The Telework Degree of Participation report outlines the total number of employees in an agency, and indicates how many are eligible for telework, and how many are teleworking.

To generate a Telework Degree of Participation report, take these steps:

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

   The Reports page opens.

2. Click **Telework Degree of Participation**.

   The page opens.

3. Use the following parameters:
   - Select an organization:
     - Optionally, accept the default organization.
       -OR-
       Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link**. The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.
   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.

    - Select the telework frequency from the **Telework Frequency** drop-down list.
    - Type the number of days in the **Day(s) Per** field.
    - Select the frequency from the **Frequency** drop-down list.

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.

Telework Summary of Hours by Pay Period

The Telework Summary of Hours by Pay Period report displays the number of hours teleworked by organizations for a specified range of pay periods. The report lists the organization, Week 1 and Week 2 teleworked hours, and the pay period range total teleworked hours.

To generate a Telework Summary of Hours by Pay Period report, take these steps:

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

   The Reports page opens.
2. Click **Telework Summary of Hours by Pay Period**.

   The page opens.
3. Use the following parameters:
    - Select an organization:
        - Optionally, accept the default organization.
          -OR-
          Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link**. The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.
    - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
    - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
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.

Timekeeper Assignments

The Timekeeper Assignments report shows which employees are assigned to individual timekeepers. To generate a Timekeeper Assignments report, take these steps:

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

The Reports page opens.

2. Click **Timekeeper Assignments**.

   The page opens:

3. Use the following parameters:

   - Click **Search** next to the Timekeeper field. The Select User page opens. Click **Select** on the row that identifies the Timekeeper. You return to the Report Parameters page and the Timekeeper field is populated with the selected name.
   - Select an organization.
     - Optionally, accept the default organization.
       -OR-
     - Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link.** The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.
   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Click the **Users** drop-down list to specify a user status:
     - **Active**. Employees are still eligible to use webTA.
     - **Inactive**. Employees' records are still in the system, but they no longer have access to webTA.
     - **Active & Inactive**. View both active and inactive employees.

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.

Timesheet Status Report

The Timesheet Status report lists, by pay period and Timekeeper, the total number of timesheets, and the count of timesheets currently in the following statuses: Pending, Validated, Certified, or Processed. Timesheets that have been flagged as On Hold in the Timesheet Profile are also included.

To generate a Timesheet Status report:

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

   The Reports page opens.

2. Click **Timesheet Status**

   The page opens:

3. Use the following parameters:

   - Click **Search** next to the Timekeeper field. The Select User page opens. Click **Select** on the row that identifies the Timekeeper. You return to the Report Parameters page and the Timekeeper field is populated with the selected name.
   - Select an organization.
     - Optionally, accept the default organization.

-OR-

- Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link.** The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.

- Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
- Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
- Click the **Users** drop-down list to specify a user status:
    - **Active**. Employees are still eligible to use webTA.
    - **Inactive**. Employees' records are still in the system, but they no longer have access to webTA.
    - **Active & Inactive**. View both active and inactive employees.

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.

Timesheet Summary Report

The Timesheet Summary report produces a printable version of the T&A Summary for selected employees, by pay period.

To generate a Timesheet Summary report, take these steps:

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

   The Reports page opens.

2. Click **Timesheet Summary**.

   The page opens:

3. Use the following parameters:
    - Click the **Pay Period** drop-down list to specify a pay period.
    - The Employees field lets you search for and select up to ten employees using these options:
        - Click **Search** to select up to ten employees for the report. The Select User page opens. Click the **check box** next to the names you want to choose. Click **Select Checked Users**. You return to the previous page and the Employees field is populated with the names.
        - Click **Remove User** next to names that you don't want to include in the report.
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.

Unassigned Employees

The Unassigned Employees report lists employees who have not been assigned to a Supervisor, Timekeeper, or organization.

To generate an Unassigned Employees report, take these steps:

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

   The Reports page opens.

2. Click **Unassigned Employees**.

   The page opens:

3. Use the following parameters:
   - Click the **Users** drop-down list to specify a user status:
     - **Active**. Employees are still eligible to use webTA.
     - **Inactive**. Employees' records are still in the system, but they no longer have access to webTA.
     - **Active & Inactive**. View both active and inactive employees.

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.

Uncertified Timesheets Report

The Uncertified Timesheets report lists timesheets that have not been certified.

To generate an Uncertified Timesheets report, take these steps:

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

   The Reports page opens.

2. Click **Uncertified Timesheets**.

   The page opens:

3. Use the following parameters:
   - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
   - Click the **Include Missing** check box to specify timesheets that are uncertified and have not yet been created ((that is, timesheets that are missing). If the check box is disabled, the report will only list timesheets that have been created but not certified.
   - Select an organization.
     - Optionally, accept the default organization.
       -OR-
       Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link.** The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-

organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.

- Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
- Click the **Users** drop-down list to specify a user status:
  - **Active**. Employees are still eligible to use webTA.
  - **Inactive**. Employees' records are still in the system, but they no longer have access to webTA.
  - **Active & Inactive**. View both active and inactive employees.

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.

Unprocessed Timesheets

The Unprocessed Timesheets report lists timesheets that have been built (processed) but not sent to the payroll provider.

To generate an Unprocessed Timesheets report, take these steps:

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

   The Reports page opens.
2. Click **Unprocessed Timesheets**.

   The page opens:
3. Use the following parameters:
   - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
   - Click the **Include Missing** check box to specify timesheets that are uncertified and have not yet been created ((that is, timesheets that are missing). If the check box is disabled, the report will only list timesheets that have been created but not certified.
   - Select an organization.
     - Optionally, accept the default organization.
       -OR-
       Click **Clear** to clear the organization that is currently displayed. The organization name is replaced with the None Selected link. Click the **None Selected link.** The Organization Management page opens. Click **Select** on the row that identifies the organization or sub-organization. You return to the Report Parameters page and the Organization field is populated with the selected organization or sub-organization.
   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Click the **Users** drop-down list to specify a user status:
     - **Active**. Employees are still eligible to use webTA.
     - **Inactive**. Employees' records are still in the system, but they no longer have access to webTA.
     - **Active & Inactive**. View both active and inactive employees.

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. For details, see the section “Working with webTA Advanced Reporting Tools.”
- **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. The ad hoc report tool requires technical proficiency beyond the skills of most users. For details and procedures, see the section “Working with webTA Advanced Reporting tools.”

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.

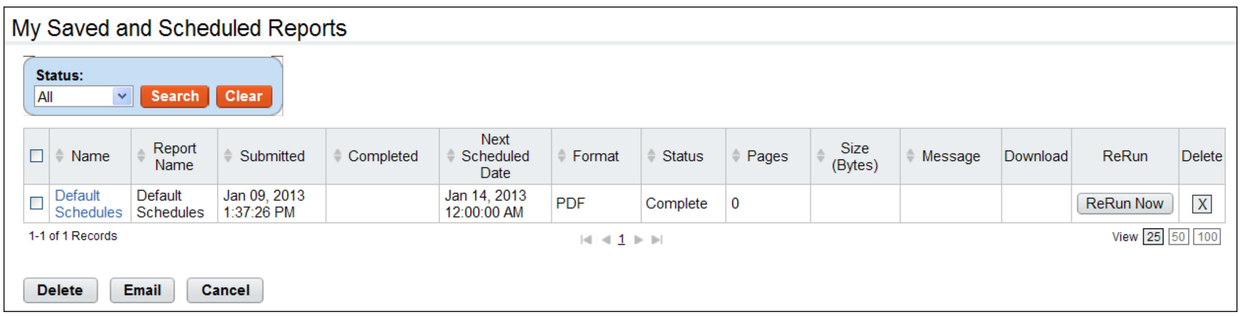
4. Click the **Background Execution** drop-down list in the upper right corner of the report parameters page. (The Background Execution drop-down list displays on some but not all NFC reports.)
5. Select an option from the Background Execution drop-down list.

   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.



Users with the Advanced Reporting license have access to additional options such as the Report Schedule tool, not shown here. For details, see the section “Working with webTA Advanced Reporting tools.”

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.

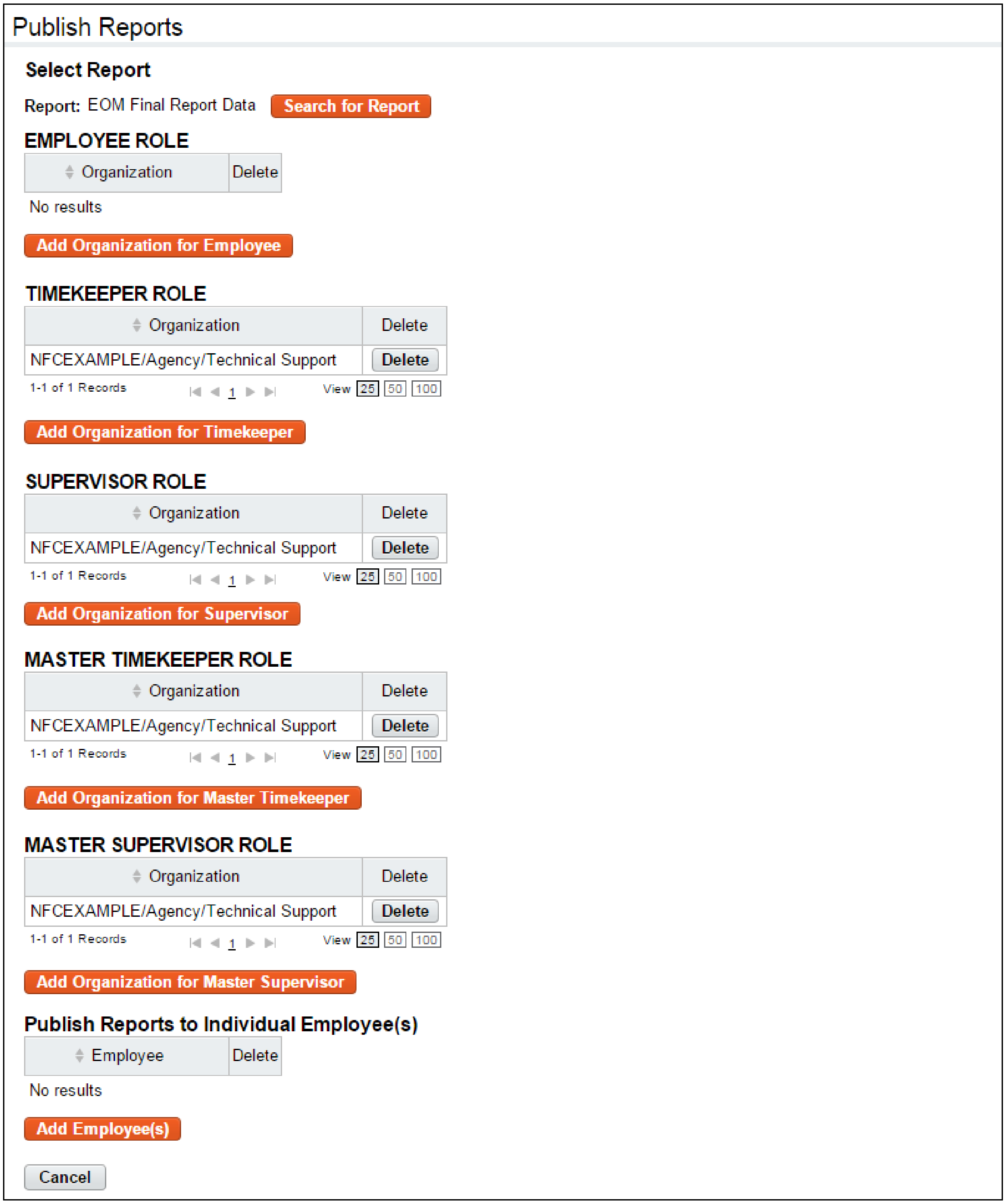
  The standard functionality serves as an analytical tool for creating report queries and viewing the result set. This is useful for gaining insight into the database structure and analyzing how tables are joined.

  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.



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.

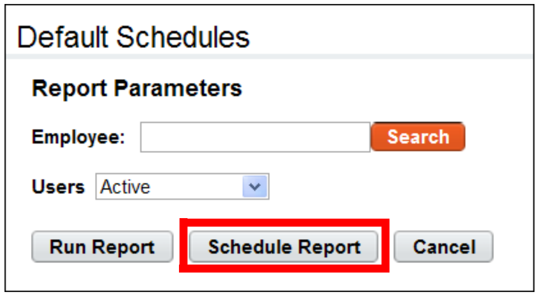
4. Under Add Organization for <Role Name>, click **Delete** on the row that identifies the organization. The organization is removed from the table. The report is no longer accessible by the role and organization.

   -OR-

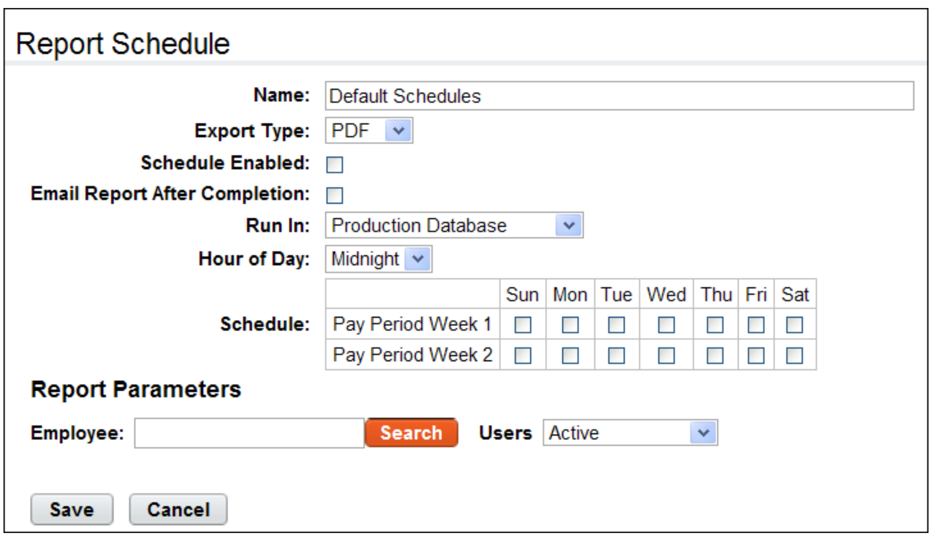
   Under Publish Reports to Individual Employee(s), click **Delete** on the row that identifies the employee. The employee is removed from the table. The report is no longer accessible by the employee.

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.*

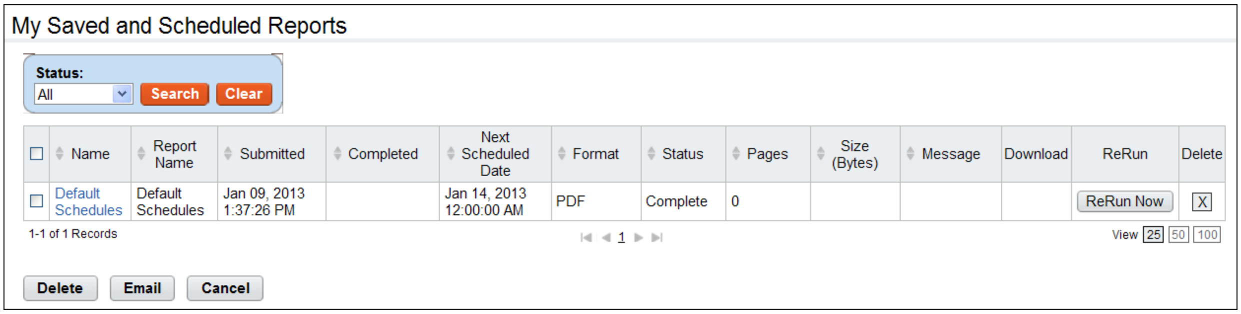
Report Schedule page contents

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 report tool

The Ad Hoc report 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:

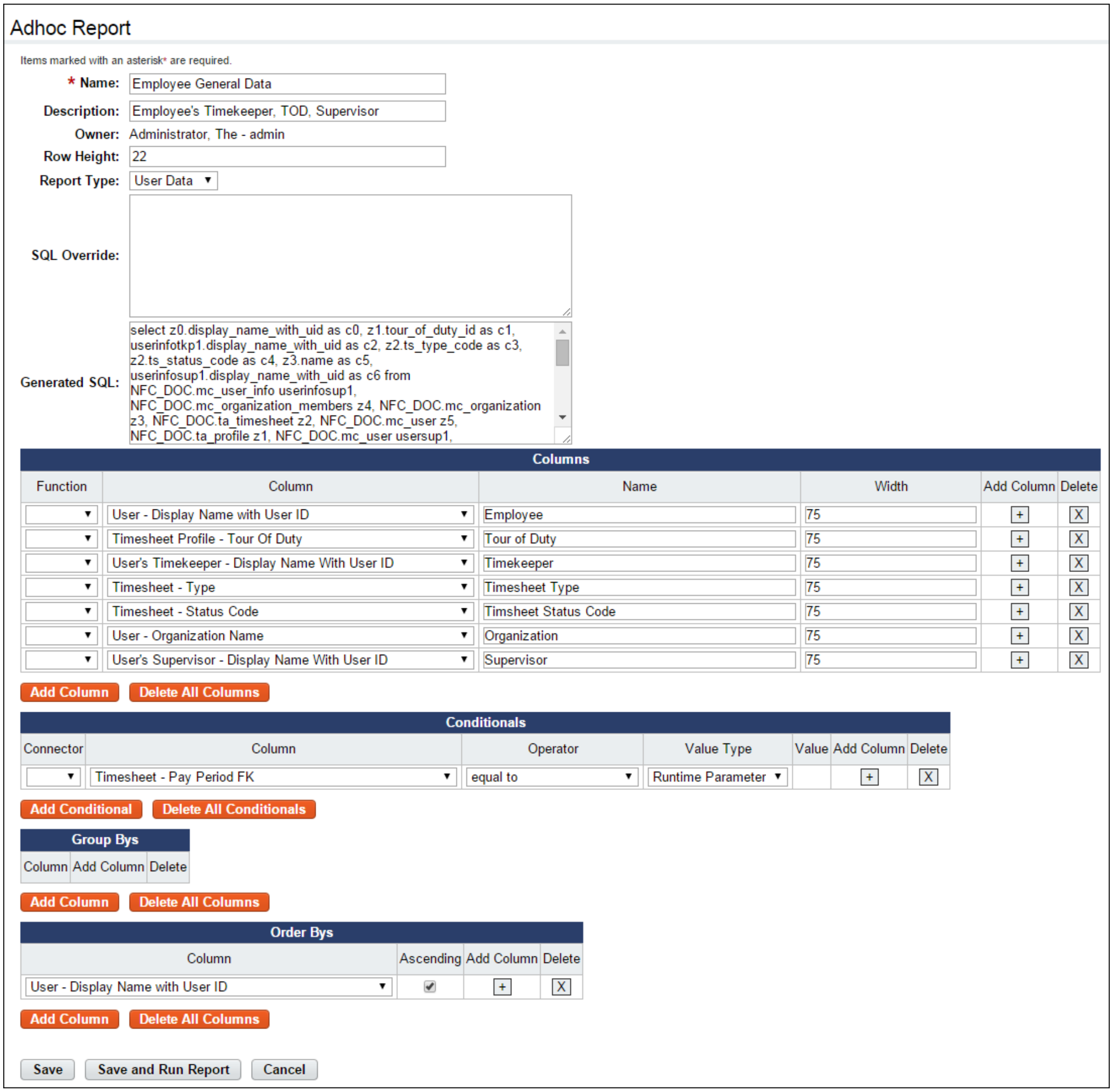
- Adding ad hoc reports
- Testing ad hoc reports
- Troubleshooting common report errors
- Deleting ad hoc reports
- Managing report quota storage

Adhoc Report page content

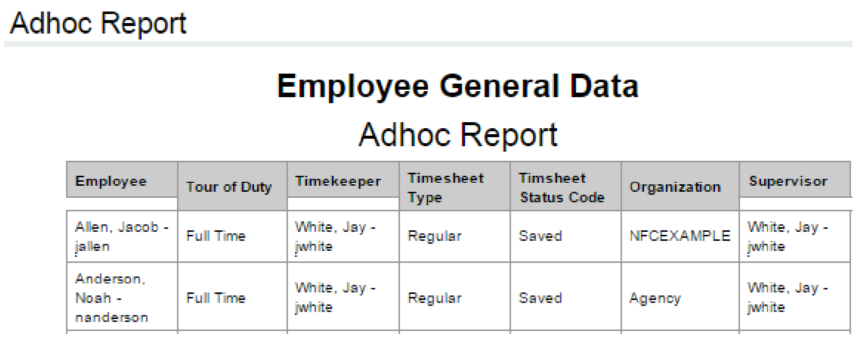
The Adhoc Report page includes features for creating simple reports to more complex reports. Some of the features require skills outside the scope of this document (for example, SQL programming language.)

This topic provides a general overview of each feature with an accompanying example from a sample adhoc report.

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



Here is corresponding sample output form the ad hoc report:



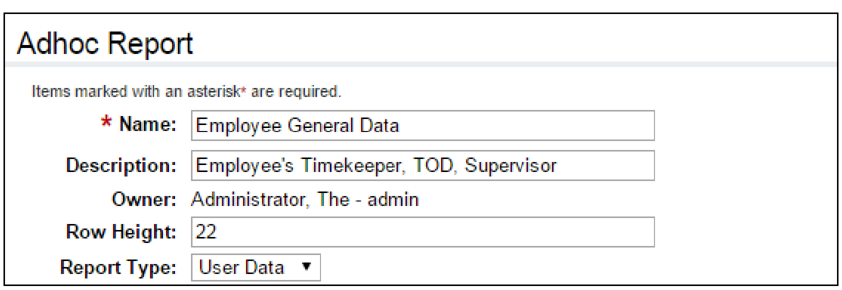
Employee	Tour of Duty	Timekeeper	Timesheet Type	Timsheet Status Code	Organization	Supervisor
Allen, Jacob - jallen	Full Time	White, Jay - jwhite	Regular	Saved	NFCEXAMPLE	White, Jay - jwhite
Anderson, Noah - nanderson	Full Time	White, Jay - jwhite	Regular	Saved	Agency	White, Jay - jwhite

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 uesful 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:



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

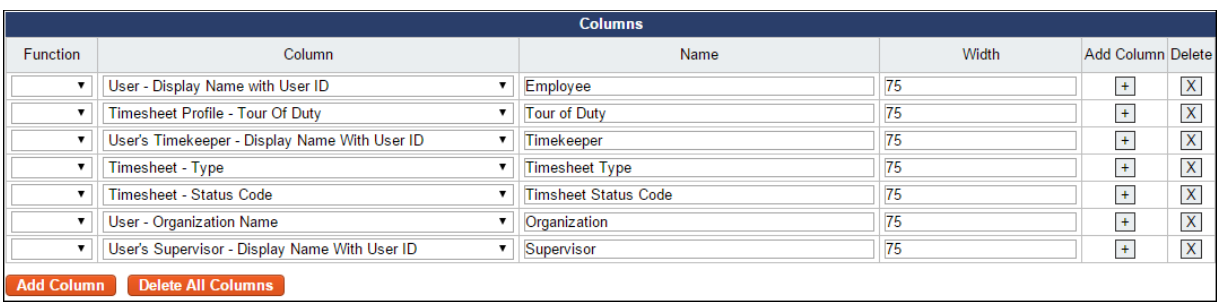
When you save an ad hoc report, the system generates and displays the SQL query in the Generated SQL text box. This feature may be used to gain insight into the database structure and allows Administrators and DBAs to examine how tables are joined. Copy and paste the generated SQL into a third party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

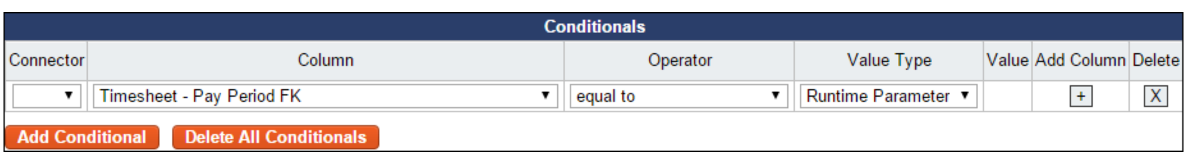
Conditionals

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.

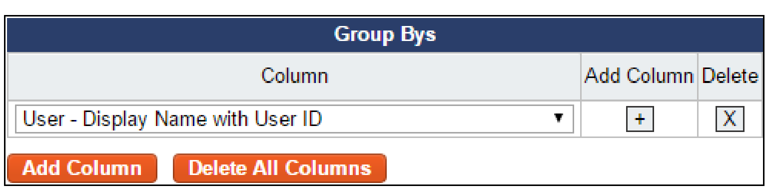
- Column. A column that forms the first piece of the conditional.
- Operator. A list of logic operators. Use operators to construct conditionals. Operators are listed below:
  - Equal to. The value in the Column is exactly equal to the Value Type and Value.
  - Case insensitive equal to. The value in 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:



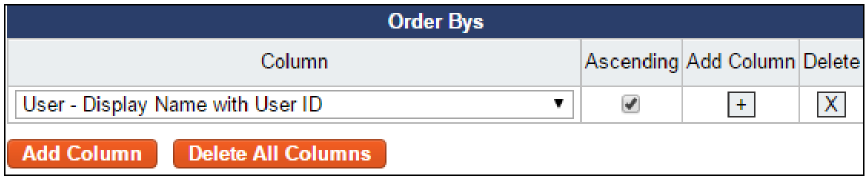
Group Bys

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:



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.