



WEB·TA ^{V4}

KRONOS

-MASTER TIMEKEEPER

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Introduction

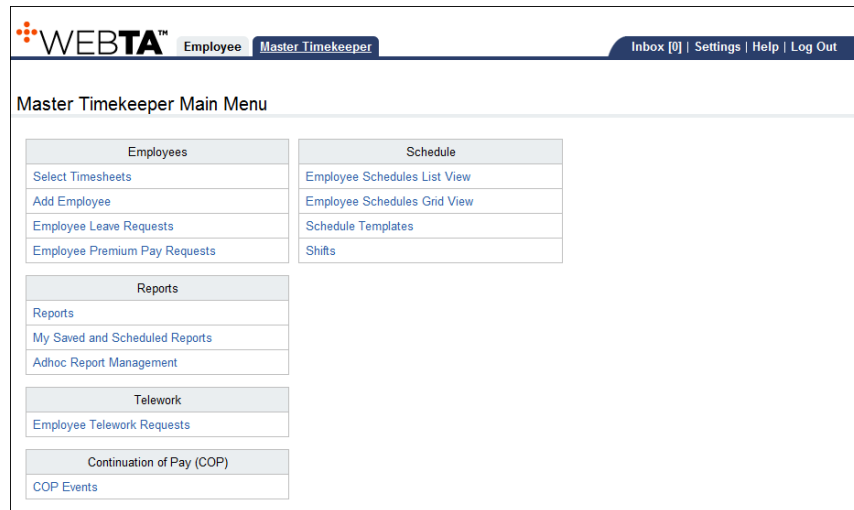
This guide explains how to perform functions that are available to webTA users who are assigned the Master Timekeeper role. The Master Timekeeper role is similar to the Timekeeper role with these important differences:

- Master Timekeepers may work with all employees in the agency (Timekeepers are limited to working with their assigned employees.)
- The Master Timekeeper role cannot be delegated. Since Master Timekeepers have neither assigned employees nor delegates, options to filter data by My Employees or My Delegated Employees do not produce results, or are not available.
- Master Timekeepers may override timesheet validation errors. (Timekeepers do not have access to the Override Validation function.)

Additional Master Timekeeper functions include validating employee timesheets, correcting timesheets, manually adding employees, maintaining employee profiles, and other tasks.

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 Master Timekeeper main menu displays some of the functions available to the Master Timekeeper role. Depending on how webTA is implemented at your agency, some functions shown in the example below may not be available.



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.

Timekeeping Cycle

webTA is configured to follow the standard Federal Government pay period schedule, which is based on a two-week pay period.

For a description of the Timekeeping Cycle and tasks that are performed by employees, Timekeepers and Supervisors, see *webTA 4.2 NFC Core Basics User Guide*. For specific guidelines about your agency's timesheet editing and validation guidelines, see your HR Administrator.

Overview of the Select Timesheets page

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

Select Timesheets

Pay Period: 07 - 2015 : Apr 05, 2015-Apr 18, 2015
Timesheet Status: Saved + Emp Validated
User ID: **Last Name:** **First Name:**
Organization: Agency **Timekeeper:** **Supervisor:** **Timesheet Type:** All

<input type="checkbox"/>	Pay Period	Timesheet Status	User ID	Last Name	First Name	Organization	Timekeeper	Supervisor
<input type="checkbox"/>	07 - 2015	Saved	jallen	Allen	Jacob	Agency	White, Jay	Fryman, Christy
<input type="checkbox"/>	07 - 2015	Saved	nanderson	Anderson	Noah	Agency	White, Jay	Fryman, Christy
<input type="checkbox"/>	07 - 2015	Saved	tbillings	Billings	Thomas	Agency	White, Jay	Fryman, Christy
<input type="checkbox"/>	07 - 2015	Saved	cfryman	Fryman	Christy	Agency	White, Jay	Administrator, The
<input type="checkbox"/>	07 - 2015	Saved	smiller	Miller	Samantha	Agency	White, Jay	Fryman, Christy
<input type="checkbox"/>	07 - 2015	Saved	trodriguez	Rodriguez	Toni	Agency	White, Jay	Fryman, Christy
<input type="checkbox"/>	07 - 2015	Saved	ssingh	Singh	Sanjay	Agency	White, Jay	Fryman, Christy
<input type="checkbox"/>	07 - 2015	Saved	jwhite	White	Jay	Agency	Allen, Jacob	Fryman, Christy

1-8 of 8 Records View

Select Action

<p>Timesheets</p> <ul style="list-style-type: none"> Timesheet Timesheet Summary Validate Selected Create Correction Processed Timesheets 	<p>Profiles and Settings</p> <ul style="list-style-type: none"> Timesheet Profile Work Schedules Default Timesheet Profile Employee Profile 	<p>Leave and Premium Pay</p> <ul style="list-style-type: none"> Leave Balances Leave Calendar Leave Requests Premium Pay Requests Telework Requests 	<p>Send Messages</p> <ul style="list-style-type: none"> Send Message 	<p>Default Schedule</p> <ul style="list-style-type: none"> Default Schedule
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Use the Select Timesheets 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 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.
- **Delegates For.** Use this drop-down list to display employee records with the following delegate criteria.
 - NONE. Shows only your employees:
 - <Delegate Name.> Shows only the employees of the selected delegate.
- **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.

Searching for Timesheets

You may use the Select Timesheets search box to search for timesheets associated with a specific employee or managed by specific Timekeepers and/or Supervisors:

- To search for timesheets associated with a specific employee, type search clues in the User ID, Last Name, and First Name text boxes, then click **Search** or press **Enter**.
- To search for timesheets of employees who are assigned to a specific Timekeeper or Supervisor, type search clues in the Timekeeper or Supervisor text boxes, then click **Search** or press **Enter**.

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 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.

Overview of the Select Actions menus

The Select Timesheets page provides access to the Select Action menus. Each menu and its functions are described below.

NOTE: *Depending on your role, some menus and functions may not be available.*

- **Timesheets**
 - Timesheet. Access one or several timesheets.
 - Timesheet Summary. View one or several Timesheet Summaries.

- **Certify Selected.** Certify one or several timesheets.
- **Validate Selected.** Validate one or several timesheets.
- **Create Correction.** Correct a processed timesheet.
- **Processed Timesheets.** View timesheets that have been certified and processed.
- **Profiles**
 - **Timesheet Profile.** View and edit one or several timesheet profiles.
 - **Default Timesheet Profile.** View and edit one or several default timesheet profiles.
 - **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.
 - **Leave Calendar.** View leave requests in a monthly calendar format.
 - **Leave Requests.** View current or archived requests. Depending on your role, you may be able to add, submit, delete, cancel, approve or deny leave requests.
 - **Premium Pay Requests.** View current or archived requests. Depending on your role, you may be able to add, submit, delete, cancel, approve or deny premium pay requests.
- **Messages**
 - **Send Message.** Send a message to one or more employees.
- **Default Schedules**
 - **Default Schedule.** View and edit one or several default schedules.

Employee and Timesheet Profiles

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

Employee Profile » Davis, Ben

Settings
Licenses
Calendars
Calendars
Locator Info
Agency Settings
Roles
Timesheet Details
Timesheet Profile

Items marked with an asterisk* are required.

No Time Tracking:

* User ID:

Password:

Retype Password:

* First Name:

Middle Name:

* Last Name:

* SSN:

Employee ID:

Active:

* Supervisor: Search for Supervisor

Organization: Find Organization

* E-Mail Address:

Timezone:

Start Page:

Save Cancel

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.
- **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

The Licenses page lists all webTA licenses to which the employee may be given access.

Calendar page contents

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

Locator page contents

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

Agency Settings page contents

The Agency Settings page contains information unique to the agency.

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, Roles, Timesheet Details, and Timesheet Profile appear on the left side of the page.

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 Timesheets** on the main menu.
The Employee Selection page opens.
2. Click the check box(es) next to the employee name(s) that you want to work with, then select **Employee Profile** from the Profiles and Settings action menu.
The Employee Profile page opens.
3. Click **Cancel** to go back to the previous page.

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.

Employee Profile » New User

Items marked with an asterisk* are required.

No Time Tracking:

* **User ID:**

* **Password:**

* **Retype Password:**

* **First Name:**

Middle Name:

* **Last Name:**

SSN:

Employee ID:

Active:

Supervisor:

Organization:

* **E-Mail Address:**

Timezone:

Start 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.

About 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. Timekeepers may add and update timesheet profiles for their assigned Employees.

An example timesheet profile is shown below.

Timesheet Profile » Anwar, Siri

- Settings
- Licenses
- Calendars
- Locator Info
- Agency Settings
-
- Roles
- Timesheet Details
- Timesheet Profile »**

Items marked with an asterisk* are required.

2 of 5

Pay Period: 23 - 2014 : Nov 16, 2014-Nov 29, 2014

Status Change

Status Change Type:

Status Change Day:

Status

Oath of Office:

Final Report:

On Hold:

Pay Details

* Payplan:

* Tour of duty:

* Duty Hours:

* Work Week:

* Alternative Work Schedule:

Overtime/Standby

RSO / Salary Cap:

Standby Hours Week 1:

Standby Hours Week 2:

Standby AUO Percent:

Leave

* Service Computation Date:

Leave Category Override: (4 hours per pay period)

Leave Ceiling Override: (240:00 hours per year)

Home Leave Computation Date:

Home Leave Category:

Home Leave End Date:

VLTP Recipient: No

ELTP Recipient: No

FMLA Invoked:

FMLA Expiration Date:

FMLA Military Invoked:

FMLA Military Expiration Date:

Military Regular Leave Flag:

Military Emergency Leave Flag:

Accounting

Accounting Type:

Pay Provider - NFC

* Agency:

* State Code:

* Town:

* Unit:

* Timekeeper:

New Contact Point:

2 of 5

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.
- **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** - Indicates the start date for an Employee to participate in the home leave accrual program.
- **Federal 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).
- **FMLA Invoked, FMLA Expiration Date**- A check mark in the FMLA Invoked check box indicates that the employee's leave request for FMLA has been invoked and approved. A date in the FMLA Expiration Date field identifies the date that the employee's FMLA expires; this date is 12 months from the Start Date in the leave request. The check box and the date may be system-generated, or manually entered by a user. Two scenarios are described below.
 - webTA enables FMLA Invoked and populates the FMLA Expiration Date. This scenario takes place when an employee invokes and submits an FMLA leave request, and the employee's Supervisor approves the request. Upon Supervisor approval, webTA enables the FMLA Invoked check box in the employee's Timesheet Profile and populates the FMLA Expiration Date. The FMLA Expiration Date is 12 months from the Start Date in the leave request.
 - If the Supervisor denies the FMLA request, there are no changes in the Timesheet Profile.
 - If the Supervisor reverts an approved request to Pending, the system clears both the FMLA Invoked check box and the FMLA Expiration Date field.
 - Users manually enable the check mark and type the FMLA Expiration Date. Users who have system permission to edit the Timesheet Profile (Timekeepers, Master Timekeepers, HR Administrators, and Administrators) may manually enable the FMLA Invoked check box and type the FMLA Expiration Date, or clear the check box and FMLA Expiration Date. This may be useful if the leave request is adjusted and a manual update is required.
- **FMLA Military Invoked, FMLA Military Expiration Date.** (Please see the explanation above for FMLA Invoked, FMLA Expiration Date.)
- **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:

Timesheet Details » Singh, Sanjay

Settings Licenses Calendars Locator Info Agency Settings Roles Timesheet Details » Timesheet Profile Labor Distribution

Items marked with an asterisk* are required.

Timesheet Details

Retain Data Type: None

* Start Pay Period for Timesheet: 21 - 2012 : Oct 07, 2012 - Oct 20, 2012

* Timesheet Entry Type: Hours

Approvers

* Timekeeper: White, Jay Search for Timekeeper

* Supervisor: Fryman, Christy Search for Supervisor

Default Intermediate Approvers

Leave Request: Search for Approver

Premium Pay Request: Search for Approver

Save Cancel

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.
 - Time In/Time Out. Specify this option for punch-based time entries. (NOTE: This option requires the webTA TITO license.)
- **Approvers** - These options designate who will validate and certify the employee's timesheet.
 - **Timekeeper.** The timekeeper to whom the employee is assigned. Click **Search for Timekeeper** to locate the timekeeper's name. The Select User page opens. Click **Select** on the row that identifies the Timekeeper. You return to the previous page and the name appears in the field.
 - **Supervisor.** The supervisor to whom the employee is assigned. Click **Search for Supervisor** to locate the supervisor's name. The Select User page opens. Click **Select** on the row that identifies the Supervisor. You return to the previous page and the name appears in the field.
- **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 Timesheets** on the main menu.
The Select Timesheets 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 **Timesheet Profile** from the Profiles 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

Timekeepers 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 Timesheets** on the main menu.
The Select Timesheets 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 **Timesheet Profile** from the Profiles and Settings action 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 Timesheets** on the main menu.
The Select Timesheets 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 **Timesheet 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.

About default timesheet profiles

The default timesheet profile is the timesheet profile associated with the default timesheet. When you enter transactions on the default timesheet, the system uses the values from the default timesheet profile to correctly populate values on the default timesheet.

Sending Messages

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the **check box(es)** 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.

Employee Timesheets

Depending on your agency, you may be responsible for working with employee timesheets. Your responsibilities may include adding, editing and deleting work and leave time, and validating timesheets.

webTA supports two types of timesheets: hourly timesheets and Time-In/Time-Out (TITO) timesheets.

Hourly timesheets are for employees who enter durations of time, for example, 8 hours of Regular Time, or 4 hours of Annual Leave. Here is an example of an hourly timesheet:

Timesheet

 Unvalidated
 Validated
 Certified
 Sent

Employee: Rodriguez, Toni

Pay Period: 23 - 2014 : Nov 16, 2014-Nov 29, 2014 * S Select Pay Period

Timesheet Type: Regular
Status: Unvalidated

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

Schedule		Totals		Remarks (0)		Leave Balances	
Su	M	T	W	Th	F	Sa	
11/16	11/17	11/18	11/19	11/20	11/21	11/22	
	8:00	8:00	8:00	8:00	8:00	8:00	
	8:00	8:00	8:00	8:00	8:00	8:00	

Action Remarks:

Characters Remaining: 255

Save
Validate
Override Validation
Delete Timesheet
Remove All Entries
Cancel

TITO timesheets are for employees who enter a start time and a stop time for worked hours (for example, 9 a.m. to 5:00 p.m. Regular Time) or leave hours (for example, 9 a.m. to 5:00 p.m. Annual Leave.) Here is an example of a TITO timesheet:

Timesheet Unvalidated Validated Certified Sent

Employee: Wilson, Mia Timesheet Type: Regular
 Pay Period: 23 - 2014 : Nov 16, 2014-Nov 29, 2014 * S Status: Regular Unvalidated

Quick Time Entry

Select Days														Time In	Time Out	Meal	Transaction	Account	
S	M	T	W	T	F	S	S	M	T	W	T	F	S				Select Transaction	Select Account	<input type="button" value="Clear"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Week 1

	Date	Transaction	Account	Time In	Time Out	Meal	Shift Total	Daily Total
<input type="checkbox"/>	Sun 11/16							
<input checked="" type="checkbox"/>	Mon 11/17	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input checked="" type="checkbox"/>	Tue 11/18	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input checked="" type="checkbox"/>	Wed 11/19	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input checked="" type="checkbox"/>	Thu 11/20	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input checked="" type="checkbox"/>	Fri 11/21	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input type="checkbox"/>	Sat 11/22							
							Week 1 Total	40:00
							Pay Period Total	80:00

Week 2

	Date	Transaction	Account	Time In	Time Out	Meal	Shift Total	Daily Total
<input type="checkbox"/>	Sun 11/23							
<input checked="" type="checkbox"/>	Mon 11/24	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input checked="" type="checkbox"/>	Tue 11/25	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input checked="" type="checkbox"/>	Wed 11/26	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input checked="" type="checkbox"/>	Thu 11/27	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input checked="" type="checkbox"/>	Fri 11/28	01 - Regular Base Pay	B1000	8:30am	5:00pm	0:30	8:00	8:00
<input type="checkbox"/>	Sat 11/29							
							Week 2 Total	40:00
							Pay Period Total	80:00

Dollar Transactions

	Date	Transaction Code	Account	Amount
<input type="checkbox"/>				
				Total
				0.00

Schedule

Su 11/16	M 11/17	T 11/18	W 11/19	Th 11/20	F 11/21	Sa 11/22	Su 11/23	M 11/24	T 11/25	W 11/26	Th 11/27	F 11/28	Sa 11/29
	8:30am-5:00pm	8:30am-5:00pm	8:30am-5:00pm	8:30am-5:00pm	8:30am-5:00pm			8:30am-5:00pm	8:30am-5:00pm	8:30am-5:00pm	8:30am-5:00pm	8:30am-5:00pm	
	8:00	8:00	8:00	8:00	8:00			8:00	8:00	8:00	8:00	8:00	

Action Remarks:
 Characters Remaining: 255

Depending on how the user's Employee Profile has been set up, new timesheets may be blank, or pre-populated with data from the previous pay period or with standard data from a schedule.

Hourly Timesheets

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

Adding work and leave time in employee hourly timesheets

IMPORTANT: Depending on your agency, you may add, edit or delete leave time in timesheets only under special circumstances. Be aware that manually editing leave or premium pay in timesheets can produce validation errors if the changes do not match the corresponding leave or premium pay requests.

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

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

The Select Timesheets page opens.

2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

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

A new row appears.

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

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

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

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

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

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

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

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

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

Editing work and leave time in employee hourly timesheets

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

- *Change a specific duration.* For example, you might change 8:00 to 6:00 in the cell for Monday. The transaction code and account remain the same. In this case, simply use the **Backspace** key to clear the current entry and type in the new entry.
- *Change the transaction code or attributes associated with an entire row.* For example, you might change the transaction code from Regular Time to On the Job Training for an entire row. In this case, select the transaction code, account or other attribute from the appropriate drop-down list.

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

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

The Select Timesheets page opens.

2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

3. To edit existing time entries, click the cursor in the field that you want to edit and press the **Backspace** key to delete the existing hours. Type the new hours and then click **Save**.
4. To select a different transaction code, click the **transaction code link**. The Transaction Code pop-up opens. Select a transaction code from the drop-down list and then click **Select Work Time Transaction** or **Leave Time Transaction**. The pop-up is removed and the transaction code is filled in.
5. Accept the default account or click the **account link** to select a different one.
The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.
6. Optionally, to edit activities on the Labor Distribution tab, see "Working with activities in timesheets."
7. Optionally, to edit cases on the Case Tracking tab, see "Working with cases in timesheets."
8. Click **Save** and then click **Cancel** to go back to the main menu.

Deleting work and leave time in employee hourly timesheets

Make the following types of deletions in timesheets:

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

To delete time entries in timesheets, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

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

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

4. To delete a row, click the **"X"** at the beginning of the transaction row.
The row is removed.
5. To delete all transactions on a timesheet (including Remarks, Labor Distribution, and Case Tracking), click **Remove All Entries**. Click **Yes** to respond to the confirmation message.
webTA removes all rows from the timesheet and tabs.
6. To delete the timesheet and the associated timesheet profile, click **Delete Timesheet**. Click **Yes** to respond to the confirmation message. All entries are removed from the timesheet and the current timesheet profile is replaced with data from the previous pay period.
7. Click **Save** and then click **Cancel** to go back to the main menu.

TITO Timesheets

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

Adding work and leave time in employee TITO timesheets

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
 2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
 3. If you want to enter the same data on multiple days, see "Using Quick Time Entry" below.
- OR -
If you want to enter unique data for a specific day, continue to the next step.
- NOTE:** *To enter multiple entries on the same day, click the **plus sign (+)** under Week 1 or Week 2. A new row is added.*
4. Click the **plus sign (+)** under Week 1 or Week 2 to add a time entry to that day.
The Transaction Code pop-up opens.
 5. Select a **transaction code** from the Work Time or Leave Time drop-down list and then click **Select Work Time Transaction** or **Leave Time Transaction**.
The pop-up is removed and the transaction code is filled in.
 6. Accept the default account or click the **account link** to select a different one.

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

7. Click the cursor in the **Time In** field. Type the start time using the format **HH:mm** (hour and minutes, separated by a colon). For example, enter 8:30. webTA auto-populates a.m. If work hours are not standard, it may be necessary to type p.m. to correct the entry.
8. Press the **Tab** key to move the cursor to the **Time Out** field, then type the stop time using the format **HH:mm** (hour and minutes, separated by a colon). For example, enter 5:15. webTA auto-populates p.m. If work hours are not standard, it may be necessary to type a.m. to correct the entry.
9. Press the **Tab** key to move the cursor to the **Meal Time** field. Type the duration, such as 00:45 minutes. Use the format **HH:mm** (hours and minutes, separated by a colon.) For example, enter 00:30 for a thirty minute meal break.
10. Optionally, to record dollar transactions, click the **plus sign (+)** under the Dollar Transactions section. A new row appears. Specify the transaction code and account, and type the dollar amount using the format dollars and cents, separated by a decimal. For example, type 62.73.
11. Optionally, to record activities on the Labor Distribution tab, see “Working with activities in timesheets.”
12. Optionally, to record cases on the Case Tracking tab, see “Working with cases in timesheets.”
13. Click **Save** and then click **Cancel** to go back to the main menu.

Using Quick Time Entry

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

1. If you haven't already done so, open the timesheet.
2. Click the **check box(es)** under Select Days.
3. Type the **Time In**, the **Time Out**, and the **meal duration**.
4. Click the **transaction code link** to select a transaction code.

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

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

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

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

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

7. Click the **plus sign (+)** at the end of the row to populate the timesheet with the quick time entry data.
8. Click **Save** and then click **Cancel** to go back to the main menu.

Editing work and leave time in employee TITO timesheets

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. To edit existing time entries, click the cursor in the field that you want to edit and press the **Backspace** key to delete the existing hours. Type the new hours and then click **Save**.
4. To select a different transaction code, click the **transaction code link**. The Transaction Code pop-up opens. Select a **transaction code** from the Work Time or Leave Time drop-down list and then click **Select Work Time Transaction** or **Leave Time Transaction**. The pop-up is removed and the transaction code is filled in.
5. Accept the default account or click the **account link** to select a different one.
The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.
6. Optionally, to edit activities on the Labor Distribution tab, see “Working with activities in timesheets.”
7. Optionally, to edit cases on the Case Tracking tab, see “Working with cases in timesheets.”
8. Click **Save** to save the timesheet.
9. Click **Cancel** to go back to the main menu.

Deleting time entries from employee timesheets

Make the following types of deletions in timesheets:

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

To delete time entries in timesheets, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

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

3. To delete a time entry, insert the cursor in the cell that contains the value and press the **Backspace** key. You can type a new entry. When you are done, click **Save**.
4. To delete a row, click the "**X**" at the beginning of the transaction row.
The row is removed.
5. To delete all transactions on a timesheet (including Remarks, Labor Distribution, and Case Tracking), click **Remove All Entries**. Click **Yes** to respond to the confirmation message.
webTA removes all rows from the timesheet and tabs.
6. To delete the timesheet and the associated timesheet profile, click **Delete Timesheet**. Click **Yes** to respond to the confirmation message. All entries are removed from the timesheet and the current timesheet profile is replaced with data from the previous pay period.
7. Click **Save** and then click **Cancel** to go back to the main menu.

About timesheet remarks

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

Adding a pay period remark

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. Click the **Remarks** tab near the bottom of the timesheet.
The tab opens.
4. Place the cursor in the **Pay Period Remarks** field and type the text.
5. Click **Save**.

Adding a daily remark

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. Click the cursor on the time entry to which you want to add the remark.
4. Double-click or press **Shift-R**. The Remarks tab near the bottom of the timesheet opens and a new row appears. The row populates with the date of the time entry (for example, Fri 7/19), the type of entry (for example, 01 - Regular Time), the user name, user ID, the current date and time, and the user's role.
-OR-
Click the Remarks tab near the bottom of the timesheet. The tab opens. Click the plus sign (+) under the Add column. A new row appears. The row populates with the user name, user ID, the current date and time, and the user's role. Select the date from the Date drop-down list.
5. Type the text in the **Remarks** field.
6. Click **Save**.
A red triangle appears in the upper right corner of the time entry cell to indicate that a remark has been added.

Deleting remarks from timesheets

To delete remarks from timesheets, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. Click the **Remarks** tab near the bottom of the timesheet.
The tab opens.
4. Click the cursor in the field under Pay Period Remarks and use the Backspace key to delete the text.
-OR-
Click the **"X"** on the row that identifies the daily remark that you want to delete. The row is deleted.
5. Click **Save**.

About the Timesheet Summary

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

- Validation messages
- Timesheet daily totals and associated hours codes
- Dollar transactions
- 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 validating timesheets

Before timesheets can be certified and transmitted to payroll, Timekeepers must validate timesheet data. Master Timekeepers may also validate timesheets, and if validation errors are generated, Master Timekeepers may override validation errors so that the timesheet can be certified and processed.

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

Validating employee timesheets

To validate one or several timesheets, take these steps:

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

The Select Timesheets page opens.

2. Click the **Pay Period link** on the row that identifies the timesheet.

-OR-

3. Click the check box next to the name of one or more employee(s) and then select **Validate Selected** from the Timesheets menu.

The timesheet(s) open.

4. Review the timesheet for accuracy and then click **Validate**.

One of the following results occurs:

- A confirmation message appears above the timesheet header, for example, "Timesheet validated successfully." The status changes to "Validated by Timekeeper." A message is automatically sent to the Supervisor to alert them of the change in the timesheet status.
- An error message appears above the timesheet header, for example, "An account is required." Errors must be resolved before validating the timesheet. Under special circumstances, Master Timekeepers may override validation errors so that the timesheet can be certified and processed.
- A warning message appears above the timesheet header, for example, "Total Regular Duty and Leave Requests hours of 79:00 must equal Biweekly Hours of 82." Work with the employee and/or Supervisor to resolve the warning and then validate the timesheet again. If no action is taken or if the corrective action is unsuccessful, work with the Supervisor to resolve the warning.

5. If you are validating multiple timesheets, click the **arrow** near the top or bottom of the page to continue; otherwise, click **Cancel** to return to the Select Timesheets page.

Overriding validation errors

Under special circumstances, the Master Timekeeper (or another designated role) may need to bypass errors generated during the validation process. For example, an employee's timesheet may include leave that was not approved through a leave request due to an emergency. Depending on how your agency's validation rules are set up, this may generate a validation error. In this case, the Master Timekeeper may use the Override Validation option so that the employee's timesheet can be submitted for payroll processing.

To override a timesheet that contains validation errors:

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

The Select Timesheets page opens.

2. Click the **Pay Period link** on the row that identifies the timesheet.

-OR-

Click the **check box** next to the name of one or more employees, and then select **Timesheet** from the Timesheets menu.

The timesheet(s) open.

3. Click **Override Validation** located at the bottom of the timesheet.

A message confirms that validation was successfully overridden and the timesheet status changes to Validation Overridden.

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

Correcting employee timesheets

To correct a timesheet, 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 **Create Correction** from the Timesheets menu.
The Create Correction page opens.
3. Optionally, select the year from the **Select Year** drop-down list and then click **Go**.
4. Depending on the type of correction, click **Create Local Correction**, **Create Prior Correction**, or **Create Correction**.
A pop-up alerts you that a timesheet profile has been created for the pay period.
5. Click **OK** to dismiss the alert and open the timesheet.
6. Make changes and click **Save**.
7. Click **Cancel** to go back to the Create Correction page.

About Processed Timesheets

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

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.

Employee Schedules

Depending on your agency's implementation of webTA, two types of schedules may be available: default schedules or advanced 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. An example default schedule is shown below:

Default Schedule

Employee: Clark, Alex

Quick Time Entry

Select Days		Time In	Time Out	Meal	Transaction	Account	
S M T W T F S S M T W T F S					None	Select Account	<input type="button" value="Clear"/>

Week 1

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

Week 2

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

Advanced schedules are similar to default schedules but offer additional features such as Regular Days Off, temporary schedules, 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.

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 **Schedule Type:** Permanent
Description: Full time 80 hours **Schedule Status:** Submitted
Start Date: Jan 13, 2013
End Date: Forever

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	

About default schedules

Employees may have the ability to add and maintain their own default schedule, or Timekeepers may perform these tasks on behalf of their employees.

Adding default schedules

To add a default schedule for an employee with an hourly timesheet, 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 **Default Schedule** from the Default Schedule action menu.
The Default Schedule page opens.
3. Click the **plus sign (+)** under Work Time.
A new row appears.
4. Accept the default transaction code or click the **transaction code link** to select a different one.
The Transaction Code pop-up opens. Select the transaction code from the drop-down list and then click **Select Work Time Transaction**.

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

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

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

6. Press the **Tab** key to move the cursor to the appropriate cell and type the duration using the format HH:mm (hours and minutes, separated by a colon.) For example, type 7.5 for seven hours and thirty minutes. Complete the schedule by entering the duration for each day.
7. Click **Save** and then click **Cancel** to go back to the previous page.

NOTE: *If the Retain Data Type in the employee profile is specified as "Pay From Schedule," the default schedule populates new timesheets. If a timesheet has already been created for the pay period and you want it to be populated by the default schedule, delete the timesheet and then reopen it.*

To add a default schedule for an employee with a TITO timesheet, 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 **Default Schedule** from the Default Schedule action menu.

The Default Schedule page opens.

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

- OR -

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

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

The Transaction Code pop-up opens.

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

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

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

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

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

7. Click the cursor in the **Time In** field. Type the start time using the format HH:mm (hour and minutes, separated by a colon). For example, enter 8:30. webTA auto-populates a.m. If work hours are not standard, it may be necessary to type p.m. to correct the entry.
8. Press the **Tab** key to move the cursor to the **Time Out** field, then type the stop time using the format HH:mm (hour and minutes, separated by a colon). For example, enter 5:15. webTA auto-populates p.m. If work hours are not standard, it may be necessary to type a.m. to correct the entry.
9. Press the **Tab** key to move the cursor to the Meal Time field. Type the duration, such as 00:45 minutes. Use the format HH:mm (hours and minutes, separated by a colon.) For example, enter 00:30 for a thirty minute meal break.

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

NOTE: *If the Retain Data Type in the employee profile is specified as “Pay From Schedule,” the default schedule populates new timesheets. If a timesheet has already been created for the pay period and you want it to be populated by the default schedule, delete the timesheet and then reopen it.*

Using Quick Time Entry

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

1. 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 **Default Schedule** from the Default Schedule action menu.
The Default Schedule page opens.
3. Click the check box(es) under **Select Days**.
4. Type the **Time In**, the **Time Out**, and the **meal duration**.
5. Click the **transaction code link** to select a transaction code.
The Transaction Code pop-up opens.
6. Select a transaction code from the drop-down list and then click **Select Work Time Transaction** or **Select Leave Time Transaction**.
The pop-up is cleared and the transaction code is filled in.
7. Click **Select Account** to select an account.
The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.
8. Click the **plus sign (+)** at the end of the row to populate the timesheet with the quick time entry data.
9. Click **Save** and then click **Cancel** to go back to the main menu.

Editing default schedules

To edit an employee’s default schedule, 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 **Default Schedule** from the Default Schedule action menu.
The Default Schedule page opens.
3. To edit existing entries, click the cursor in the field that you want to edit and press the **Backspace** key to delete the existing hours. Type the new hours and then click **Save**.

4. To select a different transaction code, click the **transaction code link**. The Transaction Code pop-up opens. Select a transaction code from the drop-down list and then click **Select Work Time Transaction**. The pop-up is removed and the transaction code is filled in.
5. Accept the default account or click the **account link** to select a different one.
The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.
6. Click **Save** and then click **Cancel** to go back to the previous page.

Deleting default schedules

To delete an employee's default schedule, 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 **Default Schedule** from the Default Schedule action menu.
The Default Schedule page opens.
***IMPORTANT!** Deleted information cannot be restored; once deleted, data must be re-entered.*
3. To delete a time entry, insert the cursor in the cell that contains the value and press the **Backspace** key. You can type a new entry. When you are done, click **Save**.
4. To delete a row, click the **"X"** at the beginning of the transaction row.
The row is removed.
5. To delete all entries, click **Remove All Entries**. Click **Yes** to respond to the confirmation message.
webTA removes all rows from the default schedule.
6. Click **Save** and then click **Cancel** to go back to the previous page.

About advanced schedules

If the Advanced Scheduling module is implemented at your agency, Timekeepers may add and submit permanent or temporary schedules for their assigned Employees. A permanent schedule is an employee's regular day to day schedule. A temporary schedule may be assigned to an employee for a length of time with a specific pay period start and end date. For example, an employee may be assigned a temporary schedule if they are attending training. Temporary schedules may also be created for a historical pay period or pay period range to generate a corrected timesheet for those pay periods. Whether a schedule is permanent or temporary, the total hours must match the Duty Hours specified in the employee's timesheet profile; otherwise the system generates a validation error.

Timekeepers create and submit schedules for employees and Supervisors respond to submitted schedule requests. The system applies the permanent schedule every pay period unless a temporary schedule has been approved for the employee. When an approved temporary schedule ends, the system automatically reverts to the employee's permanent schedule. Until the schedule has been approved by the employee's Supervisor, the schedule cannot be applied to the employee's timesheet.

The Advanced Scheduling module includes the following tools:

- **Shift.** A shift is the smallest segment of a schedule.
- **Schedule templates.** Schedule templates contain values that may be used to automatically populate employee schedules.
- **Employee Schedules List View.** The Schedule List View displays a high level summary of schedules assigned to employees. Timekeepers may click user name links to view or work with schedules for their assigned Employees.
- **Employee Schedules Grid View.** displays employees and the daily shifts assigned to each employee for the specified pay period. Timekeepers may click user name links to view or work with schedules for their assigned Employees.

Each tool is described below in more detail.

About shifts

A shift is the smallest segment of time that the Timekeeper can select to create a schedule. The HR Administrator adds and maintains a list of shifts. Master Timekeepers may view the list of available shifts on the Shifts page, shown below.

Shifts

Name: **Description:** **Start Time:** **Stop Time:**

Transaction Code: **Search** **Clear**

Name	Description	Shift Type	Start Time	Stop Time	Meal	Total Hours	Status	RDO	Transaction Code
Daily Reg 10	Daily regular 10 hours		8:00am	6:00pm	--	10:00	Active		01 - Regular Base Pay
Daily Reg 8	Daily regular 8 hours		8:30am	5:00pm	30	8:00	Active		01 - Regular Base Pay

1-2 of 2 Records View

Cancel

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.

Viewing shifts

To view a list of available shifts, take these steps:

1. Click **Shifts** from the Schedule section on the main menu.
The Shifts page opens.
2. View the list.
3. Click **Cancel** to return to the main menu.

About schedule templates

Schedule templates offer a quick, easy way to add permanent or temporary schedules. Schedule templates contain values that Master Timekeepers may use to populate schedules assigned to employees. Schedule templates eliminate the need to manually create individual schedules for employees. Instead, when a Master 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.

Schedule Template				
Name: Reg 40 hours				
Description: Regular shift 8:30a to 5p				
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
<input type="button" value="Cancel"/>				

Viewing schedule templates

To view available schedule templates, take these steps:

1. Click **Schedule Templates** from the Schedule section on the main menu.
The Schedule Templates page opens.
2. Click the **schedule template name link** that you want to view.
The Schedule Template page opens. The page is read-only for all roles except the HR Administrator.
3. Click **Cancel** to return to the previous page

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 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 adjust the assigned schedule.
-OR-
Depending on your role, add a permanent or temporary schedule. See “Adding and assigning schedules” for details.
4. Click **Cancel** to return to the previous page

About the Employee Schedules Grid View

The Employee Schedules - Grid View page displays employees and the daily shifts assigned to each employee for the specified pay period. The total scheduled hours for each day appear in the TOTALS row near the bottom of the page.

Opening the Employee Schedules Grid View

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

1. Click Employee Schedules Grid View from the Schedule section on the main menu.
The Employee Schedules Grid 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 adjust the assigned schedule.
-OR-
Depending on your role, add a permanent or temporary schedule. See “Adding and assigning schedules” for details.
4. Click **Cancel** to return to the previous page

About permanent and temporary schedules

Timekeepers are responsible for monitoring, adding and submitting schedules for their assigned Employees. An example schedule is shown below. Notice the status bar in the upper right corner. The activity log near the bottom of the page identifies who submitted and approved the schedule, and when.

Schedule - Evans, Edna submitted approved **denied**

Name: Full time **Schedule Type:** Permanent
Description: Full time 80 hours **Schedule Status:** Approved
Start Date: Jan 13, 2013
End Date: Forever

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
Approve	Approved	01/17/2013 08:58 AM	Fryman, Christy	
Submit	Submitted	01/16/2013 01:50 PM	White, Jay	

Viewing employee schedules

To view an employee's assigned schedule, take the following steps:

1. Click **Employee Schedules - List View** from the Schedule section on the main menu.
The Employee Schedules - List View page opens.
- OR -
Click **Employee Schedules - Grid View** from the Schedule section on the main menu.
The Employee Schedules - Grid View page opens.
2. Click the **employee name link** to open the employee's schedule assignment.
The Schedule Assignment page opens.
3. Click the **schedule name link** of the permanent or temporary schedule that you want to view.
The Schedule page opens.
4. View the schedule.
5. Click **Cancel** to return to the previous page.

Adding and assigning schedules

To add and assign a permanent or temporary schedule to an employee, take the following steps:

1. Click **Employee Schedules - List View** from the Schedule section on the Main Menu.
The Employee Schedules - List View page opens.
2. Click the **employee name link** to open the employee's schedule assignment.
The Schedule Assignment page opens.
3. Click **Add Permanent Schedule**.
The (Add) Schedule page opens.
- OR -
Click **Add Temporary Schedule**.
The (Add) Temporary Schedule page opens.
4. Optionally, click **Insert Schedule Template** to select an existing schedule template.
The schedule is populated with values from the schedule template. Continue to the next step to modify the name, description, shift or other information or go to the last step to submit the schedule.
5. Type a schedule name in the **Name** field.
6. Type a brief description in the **Description** field.
7. Select the number of weeks from the **Weeks** drop down menu.
8. Accept the default **start date** or click the calendar icon to specify a different start date. The start date must coincide with the start date of a pay period.
9. Accept the default **end date** or click the calendar icon to specify a different end date. The end date must coincide with the end date of a pay period. An end date is required for temporary schedules and optional for permanent schedules.
10. Click check boxes next to the days of the week in which you want to insert a shift.
11. Click **Insert Shift**.
The Insert Shift pop-up box opens.
12. Click the row that identifies the shift you want to insert and then click **OK**.
You return to the (Add) Schedule page and the shift populates the days you identified.
13. Optionally, click the **plus sign (+)** under the Add Row column to insert another shift on a day that is populated with an existing tour. A second row appears.
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 you want to insert and then click **OK**. You return to the (Add) Schedule page.
14. Optionally, click the **"X"** under the Delete column to delete 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.

15. Click **Submit** to save the schedule and submit it to the Supervisor.

- OR -

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

Leave Balances

Master Timekeepers may view, monitor, and adjust employee leave balances.

About 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

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	

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Viewing employee leave balances

To view leave balances for employees, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee name(s) you want to work with.

3. Select **Timesheet Summary** from the Timesheet 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 **Go**.
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 Timesheets** on the main menu.
The Select Timesheets 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. Optionally, click the **Balances for pay period** drop-down list to select a different pay period and then click **Select Pay Period**.
The leave balance table is updated.
5. Click the **leave type name link** that you want to adjust.
The Details of Leave page opens.
6. Click **Add Manual Forward Adjustment**.
The Adjust Forward Balance page opens.
7. Click the **Pay Period** drop-down list and select the pay period in which the adjustment will take place.
8. Type the new balance in the Adjusted Forward Balance field.
9. Click **Save** and then click **Cancel** to go back to the previous page.

Employee Leave Requests

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

About leave request workflows

A typical leave request process may have the following workflow:

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

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

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

Monitoring leave requests

The Leave Requests - Current page displays pending, approved, or denied leave requests for the current and future pay periods. The page also shows leave requests from past pay periods that are in pending status. The Leave Requests - History page displays approved or denied requests for past pay periods. A sample Leave Requests - Current page is shown below.

Status	User	Start Date	End Date	Leave Type	Hours	Submission Date	Supervisor	Timekeeper
Pending	Allen, Jacob	01/08/2013	01/08/2013	62 - Sick Leave	2:00	01/08/2013 10:07 AM	Fryman, Christy	White, Jay
Approved	Smith, Tina	01/07/2013	01/07/2013	62 - Sick Leave	8:00	01/08/2013 09:58 AM	Fryman, Christy	White, Jay

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View

[History](#) [View Calendar](#) [Cancel](#)

Click **History** to see historical leave requests. Click **Current** to see current and future leave requests. Click **View Calendar** to see leave request information in the format of a monthly calendar.

Working with leave requests

MasterTimekeepers may view leave requests for assigned employees. If the Master Timekeeper has been designated as an intermediate approver, the Master Timekeeper may also approve or deny requests.

Viewing employee leave requests

To view an employee leave request, take these steps:

1. Click **Employee Leave Requests** on the main menu.
- OR -
Click **Select Timesheets** on the main menu. Click the **check box(es)** next to the employee name(s) that you want to work with, then select **Leave Requests** from the Leave and Premium Pay action menu.
The Leave Requests - Current page opens.
2. Click the **leave request status link** on the row that identifies the request you want to view.
The Leave Request Form page opens.
3. Click **Cancel** to go back to the previous page.

Approving and denying intermediate approver leave requests

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

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

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

1. Click **Review Leave Requests** from the Intermediate Approvals section on the Employee main menu.
The Leave Requests - Current page opens.
2. Click the **leave request status link** on the row that identifies the request you want to work with.
The Leave Request Form page opens.
3. To approve the request, click **Intermediate Approve** near the bottom of the page. A message confirms that the request has been updated. The system routes the request to the next approver.
-OR-
To deny the request, type the reason in the Approver Comments text box and then click **Update**.
Click **Intermediate Deny**. A message confirms the action.
4. Click **Cancel** to go back to the previous page.

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

Pending Approved Denied

Leave Request Form

Leave Balance Calculator

Employee: Allen, Jacob

Leave Type: 61 - Annual Leave

Transaction Leave Balance: Annual Leave 106:00

		Leave Request Times					
* Start Date	* End Date	All Day	Start Time	Stop Time	Daily Hours	Total Hours	Action
Nov 26, 2014	Nov 26, 2014	<input checked="" type="checkbox"/>	7:00am	3:00pm	8:00	8:00	

Remarks

Submitter Remarks:

Approver Comments:

Intermediate Approvers

Overall Status: Pending

Name	Status
Stock, Donna	Pending

Sick Leave Purpose

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

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

Family and Medical Leave Act

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

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

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

Certification

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

Privacy Act

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

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

Activity Log

Action	Resulting State	Date	Name
Submit	Pending	11/24/2014 11:14 AM	Allen, Jacob

Intermediate Approve Intermediate Deny Cancel

Employee Premium Pay Requests

Master Timekeepers use the Premium Pay Request function to track the status of premium pay requests, and view current or historical premium pay requests. Depending on whether your Agency implements the Intermediate Approver feature, Timekeepers may also have the ability to perform tasks as Intermediate Approvers.

About premium pay request workflows

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

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

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

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

Monitoring premium pay requests

The Premium Pay Requests - Current page displays pending, approved, or denied premium pay requests for the current and future pay periods. The page also shows premium pay requests from past pay periods that are in pending status. The Premium Pay Requests - History page displays approved or denied requests for past pay periods. A sample Premium Pay Requests - Current page is shown below:

Status	User	Start Date	End Date	Transaction	Total Hours	Submit Date	Supervisor
Approved	Anderson, Noah	01/06/2013	01/06/2013	32 - Compensatory Travel Earned	4:00	01/08/2013 03:19 PM	Fryman, Christy - cfryman
Pending	Davis, Ben	01/07/2013	01/07/2013	19 - Overtime Over 8	3:30	01/08/2013 03:17 PM	Fryman, Christy - cfryman

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◀ ◁ 1 ▷ ▶

View

Click **History** to see historical premium pay requests. Click **Current** to see current and future requests. Click **View Calendar** to see premium pay request information in the format of a monthly calendar.

Working with premium pay requests

MasterTimekeepers may view premium pay requests for assigned employees. If the Master Timekeeper has been designated as an intermediate approver, the Master Timekeeper may also approve or deny requests.

Viewing employee premium pay requests

To view employee premium pay requests, take these steps:

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

-OR-

Click **Select Timesheets** on the main menu. Click the check box(es) next to the employee name(s) that you want to work with, then select **Premium Pay Requests** from the Leave and Premium Pay action menu.

The Premium Pay Requests page opens.

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

The Premium Pay Request page opens.

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

Approving and denying intermediate approver premium pay requests

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

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

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

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

The Premium Pay Requests - Current page opens.

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

The Premium Pay Request Form page opens.

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

-OR-

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

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

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

Premium Pay Request

Pending
Approved
Denied

Transaction and Dates

Employee: Allen, Jacob

Transaction: 32 - Compensatory Travel Earned

Premium Pay Request Times

* Start Date	* End Date	Start Time	Stop Time	Daily Hours	Total Hours	Action
Oct 05, 2013	Oct 06, 2013	9:00am	5:00pm	8:00	16:00	

Remarks

Submitter Remarks: Prep for shutdown

Approver Comments:

Intermediate Approvers

Overall Status: Pending

Name	Status
Miller, Samantha	Pending
Stock, Donna	Pending

Activity Log

Action	Resulting State	Date	Name	Comments
Submit	Pending	11/24/2014 12:03 PM	Allen, Jacob	
Submit	Pending	11/20/2014 02:26 PM	White, Jay	
Submit	Pending	10/14/2013 04:12 PM	Allen, Jacob	

webTA Add-on Modules

Master Timekeepers may work with the following add-on modules.

webTA Labor Distribution

Agencies may implement the Labor Distribution module to track time and attendance data against labor distribution activity categories, activity sets and activities. If timesheets include the Labor Distribution tab, then you may have the ability to add, edit or delete activities.

Schedule	Totals	Remarks	Leave Balances	Labor Distribution							Case Tracking						
Activity	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Wk1	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Wk2	Delete
Customer Satisfaction/ Customer Satisfaction Survey/ Develop customer satisfaction survey/ Test customer satisfaction survey		2:30						2:30									<input type="checkbox"/>
Customer Satisfaction/ Customer Satisfaction Survey/ Develop customer satisfaction survey/ Analyze customer sat survey results					4:00			4:00		4:00				4:00		8:00	<input type="checkbox"/>
Total		(2:30)	(0:00)	(0:00)	(4:00)	(0:00)		(6:30)		(0:00)	(4:00)	(0:00)	(0:00)	(4:00)		(8:00)	

Add Activity

Summary:
 Timesheet Total: 72:00
 Labor Dist. Total: (14:30)

Save Validate Override Validation Delete Timesheet Remove All Entries Cancel

Working with activities in timesheets

To add activities to a timesheet, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. Click the **Labor Distribution tab** near the bottom of the timesheet.
The Labor Distribution tab opens.
4. Click **Add Activity**.
The Add Activity page opens.
5. Click the **check box** next to the activity you want to add to your timesheet.
NOTE: In order for activities to appear on the Add Activity page, activities must be assigned to employees or organizations. If activities do not appear, contact the employee's Supervisor for assistance.
6. Click **Save**.
The activity set is listed under the Activity column on the Labor Distribution tab.
7. Enter **activity hours** or **percentages** in the Labor Distribution cells.

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

To edit activities in a timesheet, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. Click the **Labor Distribution tab** near the bottom of the timesheet.
The Labor Distribution tab opens.
4. Edit **activity hours** or **percentages** in the Labor Distribution cells.
5. Click **Save** to save the timesheet.

To delete activities from a timesheet, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. Click the **Labor Distribution tab** near the bottom of the timesheet.
The Labor Distribution tab opens.
4. Click the "X" under the Delete column on the row you want to remove.
The row is deleted, including the hours or percentages entered for the activity.

webTA Continuation of Pay (COP)

Employees who are injured while engaged in official work activities or on work premises may be eligible for Continuation of Pay (COP). If the employee meets eligibility criteria, the COP Administrator creates a COP event in webTA.

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 employee COP leave balances

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. Click the **Leave Balances tab** to view COP leave balances.
4. Click **Cancel** until you return to the main menu.

Adding COP leave time in hourly timesheets

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.
- OR -
Click the **Pay Period link** on the row that identifies the employee you want to work with.
The timesheet opens.
3. Click the **plus sign (+)** under Leave Time.
A new row appears.
4. Click the **transaction code link** to select a COP leave time transaction code.
The Transaction Code pop-up opens.
5. Select the **transaction code** from the drop-down list and then click **Select. Leave Time Transaction**.

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

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

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

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

7. Accept the default account or click the **account link** to select a different one.
The Accounting pop-up opens. Click **Select** on the row that identifies the account. The pop-up is removed and the account is filled in.

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

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

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

Adding COP leave time in TITO timesheets

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

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

- OR -

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

4. Click the **plus sign (+)** under Week 1 or Week 2 to add a COP leave time entry to that day.
The Transaction Code pop-up opens.

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

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

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

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

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

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

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

9. Press the **Tab** key to move the cursor to the **Time Out** field, then type the stop time using the format **HH:mm** (hour and minutes, separated by a colon). For example, enter 5:15. webTA auto-

populates p.m. If work hours are not standard, it may be necessary to type a.m. to correct the entry.

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

Using Quick Time Entry

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

1. If you haven't already done so, open the timesheet.
2. Click the **check box(es)** under Select Days.
3. Type the **Time In**, the **Time Out**, and the **meal duration**.
4. Click the **transaction code link** to specify a COP leave transaction code.

The Transaction Code pop-up opens.

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

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

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

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

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

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

8. Click the **plus sign (+)** at the end of the row to populate the timesheet with the quick time entry data.
9. Click **Save** and then click **Cancel** to go back to the main menu.

webTA Case Tracking

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

Working with cases in timesheets

To add cases to a timesheet, take these steps:

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

The Select Timesheets page opens.

2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

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

The Case Tracking tab opens.

4. Click **Add Case**.

The Select Cases page opens.

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

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

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

6. Click **Save**.

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

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

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

The Select Timesheets page opens.

2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

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

The Case Tracking tab opens.

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

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

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

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

The Select Timesheets page opens.

2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

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

The Case Tracking tab opens.

4. Edit **case hours** in the Case Tracking cells.
5. Click **Save** to save the timesheet.

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

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

The Select Timesheets page opens.

2. Click the check box next to the employee you want to work with and then select **Timesheet** from the Timesheets menu.

- OR -

Click the **Pay Period link** on the row that identifies the employee you want to work with.

The timesheet opens.

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

The Case Tracking tab opens.

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

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

webTA Telework

If the webTA Telework module has been implemented at your agency, the Telework section may appear on the Timekeeper main menu. Timekeepers may submit telework requests on behalf of their assigned employees. The system sends workflow notifications to the employee, Timekeeper and Supervisor as the request is routed. Depending on how webTA is configured, telework hours may be automatically populated in an employee's timesheet upon approval by the Supervisor.

A sample Telework Request - Current page is shown below:

Timekeeper Main Menu >

Telework Request - Current

Status	User	Start Date	End Date	Telework Code	Hours	Submission Date
Pending	Adams, Janine	03/28/2014	03/28/2014	Telework Home	8:00	03/06/2014 04:15 PM
Pending	Davis, Ben	03/07/2014	03/07/2014	Telework Home	8:00	03/06/2014 04:16 PM
Pending	Smith, Tina	03/17/2014	03/21/2014	Telework Home	40:00	03/06/2014 04:14 PM

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History Cancel

Click **History** to see historical premium pay requests. Click **Current** to see current and future requests. Click **View Calendar** to see premium pay request information in the format of a monthly calendar.

A sample Telework Request page is shown below.

Telework Request

Pending
Approved
Denied

Telework Type and Dates
Employee: Fryman, Christy

* Telework Code:

* Reason:

Reason Notes:

Start Date	End Date	Start Time	Stop Time	Daily Hours	Total Hours	Action
Feb 13, 2014	Feb 14, 2014	9:00am	5:00pm	8:00	16:00	<input type="button" value="Delete"/>

Remarks

Approver:

Comments:

Activity Log

Action	Date	Name	Comments
Submit	02/06/2014 02:48 PM	Fryman, Christy	

Adding employee telework requests

To add and submit an employee telework request, take these steps:

1. Click **Telework Requests** under the Telework section on the main menu.
The Telework Request page opens.
2. Click **Add New Request**.
The Telework Request page opens.
3. Complete the fields.
4. Click **Submit**.

-OR-

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

Deleting employee telework requests

To delete an employee telework request, take these steps:

1. Click **Telework Requests** under the Telework section on the main menu.
The Telework Request page opens.
2. Click the **telework request status link** on the row that identifies the request you want to delete.
The Telework Request page opens.
3. Click **Delete**.

A confirmation message appears.

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

-OR-

Click **Cancel** to dismiss the operation.

Modifying employee telework requests

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

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

The Telework Request page opens.

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

The Telework Request page opens.

3. Make changes.

4. Click **Submit**.

-OR-

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

-OR-

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

Reports

The following webTA reports are available to Master Timekeepers:

- Adhoc Report
- Timesheet Status

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

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.

Timesheet Status									
Pay Period	Timekeeper	Org	Total	Pending	Validated	Certified	Processed	On Hold	
2014-06	White, Jay	NFCEXAMPLE	22	20	0	0	2	0	
2014-07	White, Jay	NFCEXAMPLE	23	22	1	0	0	0	

Page 1

Report Parameters

Report Header:

Timekeeper:

Organization:

Include Sub Orgs:

From PP:

To PP:

Users:

To generate a Timesheet Status report, take these steps:

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.

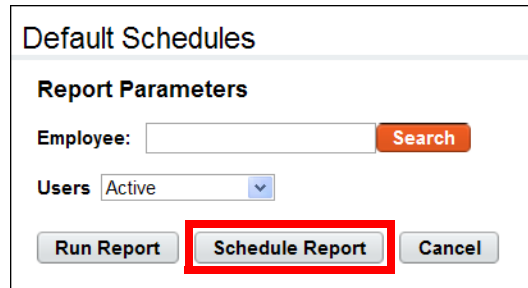
- Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
 - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
 - Click the **Users** drop-down list to specify a user status:
 - **Active**. 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.

webTA Advanced Reporting tools

If your agency has implemented the webTA Advanced Reporting module, you may be able to use the Report Schedule tool.

Using the Report Schedule tool

Use the Report Schedule tool to 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.



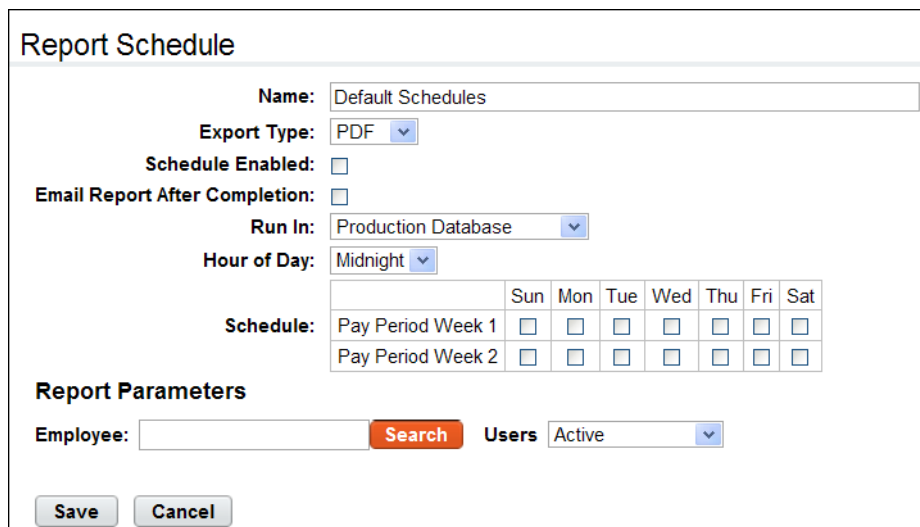
Default Schedules

Report Parameters

Employee:

Users: Active

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



Report Schedule

Name:

Export Type: PDF

Schedule Enabled:

Email Report After Completion:

Run In: Production Database

Hour of Day: Midnight

Schedule:	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Pay Period Week 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay Period Week 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Report Parameters

Employee: Users: Active

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:

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

1-1 of 1 Records

View 25 50 100

Delete Email Cancel

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

My Saved and Scheduled Reports page contents

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

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

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

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

- **Message.** System messages produced when the report was generated.
- **Download.** Download the report file to a local computer.
- **Rerun.** Run the report now.

Adding and saving report schedules

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

1. Click **Reports** from the Reports section on the main menu.
The Reports page opens.
2. Click the report that you want to schedule.
The page opens.
3. Click **Schedule Report**.
The Report Schedule page opens.
4. Complete the fields.
5. Specify the report parameters.
6. Click **Save** and then click **Cancel** to go back to the previous page.

Viewing saved and scheduled reports

To view a report schedule, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.
The My Saved and Scheduled Reports page opens.
2. Click **Cancel** to go back to the previous page.

E-mailing saved and scheduled reports to yourself

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

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.
The My Saved and Scheduled Reports page opens.
2. Click the check box on the row that identifies the report and then click **Email** near the bottom of the page.
A confirmation message appears.
3. Click **Yes** to e-mail the report.
- OR -
Click **No** to cancel the operation.
4. Click **Cancel** to go back to the previous page.

Modifying report schedules

To modify a report schedule, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.
The My Saved and Scheduled Reports page opens.
2. Click the **report name link**.
The Report Schedule page opens.
3. Make changes.
4. Click **Save** and then click **Cancel** to go back to the previous page.

Deleting report schedules

To delete a report schedule, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.
The My Saved and Scheduled Reports page opens.
2. Click the check box on the row that identifies the report and then click **Delete**.
A confirmation message appears.
3. Click **Yes** to delete the report schedule.
- OR -
Click **No** to cancel the operation.

Using the Ad Hoc reports tool

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

- **Analytical tool.** Administrators and DBAs may use the tool to gain insight into the database structure and analyze how tables are joined. This is a basic function of the ad hoc report management tool and is available as a feature of the webTA NFC Core product.
- **Data extraction tool.** Administrators and other roles may use the tool to create reports that users run to extract data that is relevant to specific job roles. For example, Supervisors may need to identify overtime worked within their employee group on a pay period basis; you may use the ad hoc report tool to create a custom report to quickly gather the data. This use of the ad hoc reports tool requires implementing the Advanced Reporting module and users require the accompanying license in order to run the reports.

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

This topic explains how to perform the following ad hoc report procedures:

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

Adhoc Report page content

The Adhoc Report page includes features for creating simple reports to more complex reports. Some of the features require skills outside the scope of this document (for example, SQL programming language.) This topic provides a general overview of each feature with an accompanying example from a default adhoc report called "Build Report."

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

Adhoc Report

*** Name:** Build Report

Description: Employee build data for a specified pay period.

Published:

Row Height: 22

Report Type: Timesheet Data

SQL Override:

Columns

Function	Column	Name	Width	Add Column	Delete
▼	User - Display Name with User ID	Employee	75	+	X
▼	User - TL Unit	TL Unit	75	+	X
▼	Timesheet - Validator Display Name With User ID	Validator	75	+	X
▼	Timesheet - Date Validated	Date Validated	120	+	X
▼	Timesheet - Certifier Display Name With User ID	Certifier	75	+	X
▼	Timesheet - Date Certified	Date Certified	120	+	X
▼	Timesheet - Type	Type	75	+	X
SUM	Timesheet TITO Entry - Total Hours w/o Meal	Total Hours	75	+	X

Add Column **Delete All Columns**

Conditionals

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

Add Conditional **Delete All Conditionals**

Group Bys

Column	Add Column	Delete
User - Display Name with User ID	+	X
User - TL Unit	+	X
Timesheet - Validator Display Name With User ID	+	X
Timesheet - Date Validated	+	X
Timesheet - Certifier Display Name With User ID	+	X
Timesheet - Date Certified	+	X
Timesheet - Type	+	X

Add Column **Delete All Columns**

Order Bys

Column	Order	Add Column	Delete
User - Display Name with User ID	<input checked="" type="checkbox"/>	+	X

Add Column **Delete All Columns**

Save **Run Report** **Cancel**

Here is corresponding sample output form the ad hoc report:

Adhoc Report							
Build Report							
Employee	TL Unit	Validator	Date Validated	Certifier	Date Certified	Type	Total Hours
Aldrin, Buzz - buzz.aldrin	00101004	Administrator, The - admin	2012-05-03 15:07:55.0	Administrator, The - admin	2012-05-03 15:08:20.0	Regular	80:00
Ample, Xavier - xavier.ample	00100000	Administrator, The - admin	2012-05-03 15:10:30.0	Administrator, The - admin	2012-05-03 15:10:43.0	Regular	80:00
Anthony, Carmelo - carmelo.anthony	00100000	Administrator, The - admin	2012-05-04 09:03:32.0	Administrator, The - admin	2012-05-04 09:05:04.0	Regular	80:00

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.
- Published. Whether you want other users to be able to access the report. To allow access, click the check box; to disable access, clear the check box. Everyone who can view ad hoc reports will see published reports.
- 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.
 - User Data. This option provides access to timesheet data.
 - Audit Data. This option provides access to audit log data. This option is limited to System Administrators.

An example of the General Information area is shown below:

Adhoc Report	
* Name:	Build Report
Description:	Employee build data for a specified pay period.
Published:	<input checked="" type="checkbox"/>
Row Height:	22
Report Type:	Timesheet Data <input type="button" value="v"/>

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.

Columns

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

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

An example of the Columns area is shown below:

Columns					
Function	Column	Name	Width	Add Column	Delete
▼	User - Display Name with User ID	Employee	75	+	X
▼	User - TL Unit	TL Unit	75	+	X
▼	Timesheet - Validator Display Name With User ID	Validator	75	+	X
▼	Timesheet - Date Validated	Date Validated	120	+	X
▼	Timesheet - Certifier Display Name With User ID	Certifier	75	+	X
▼	Timesheet - Date Certified	Date Certified	120	+	X
▼	Timesheet - Type	Type	75	+	X
SUM	Timesheet TITO Entry - Total Hours w/o Meal	Total Hours	75	+	X

Conditionals

This feature lets you construct custom queries that include conditions.

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

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

An example of the Conditionals area is shown below:

Conditionals						
Connector	Column	Operator	Value Type	Value	Add Column	Delete
<input type="checkbox"/>	Timesheet - Pay Period FK	equal to	Runtime Parameter		<input data-bbox="1242 1312 1258 1333" type="button" value="+"/>	<input data-bbox="1323 1312 1339 1333" type="button" value="X"/>
<input data-bbox="267 1354 397 1375" type="button" value="Add Conditional"/>		<input data-bbox="422 1354 609 1375" type="button" value="Delete All Conditionals"/>				

Group Bys

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

Group Bys		
Column	Add Column	Delete
User - Display Name with User ID	+	X
User - TL Unit	+	X
Timesheet - Validator Display Name With User ID	+	X
Timesheet - Date Validated	+	X
Timesheet - Certifier Display Name With User ID	+	X
Timesheet - Date Certified	+	X
Timesheet - Type	+	X

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:

Order Bys			
Column	Order	Add Column	Delete
User - Display Name with User ID	<input checked="" type="checkbox"/>	+	X

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. Click the **Published** check box to allow other users to access the report. To limit the report to personal use, clear the check box.
6. Accept the default row height or type in a different height.
7. Accept the default value from the **Report Type** drop-down list.
8. Optionally, enter SQL commands in the **SQL Override** text box. (This option may not be available to all users.)
9. 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.
10. 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.
11. 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.
12. 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.
13. 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.