

Kronos webTA 4.2

DOC Supervisor User Guide

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DOC Supervisor User Guide
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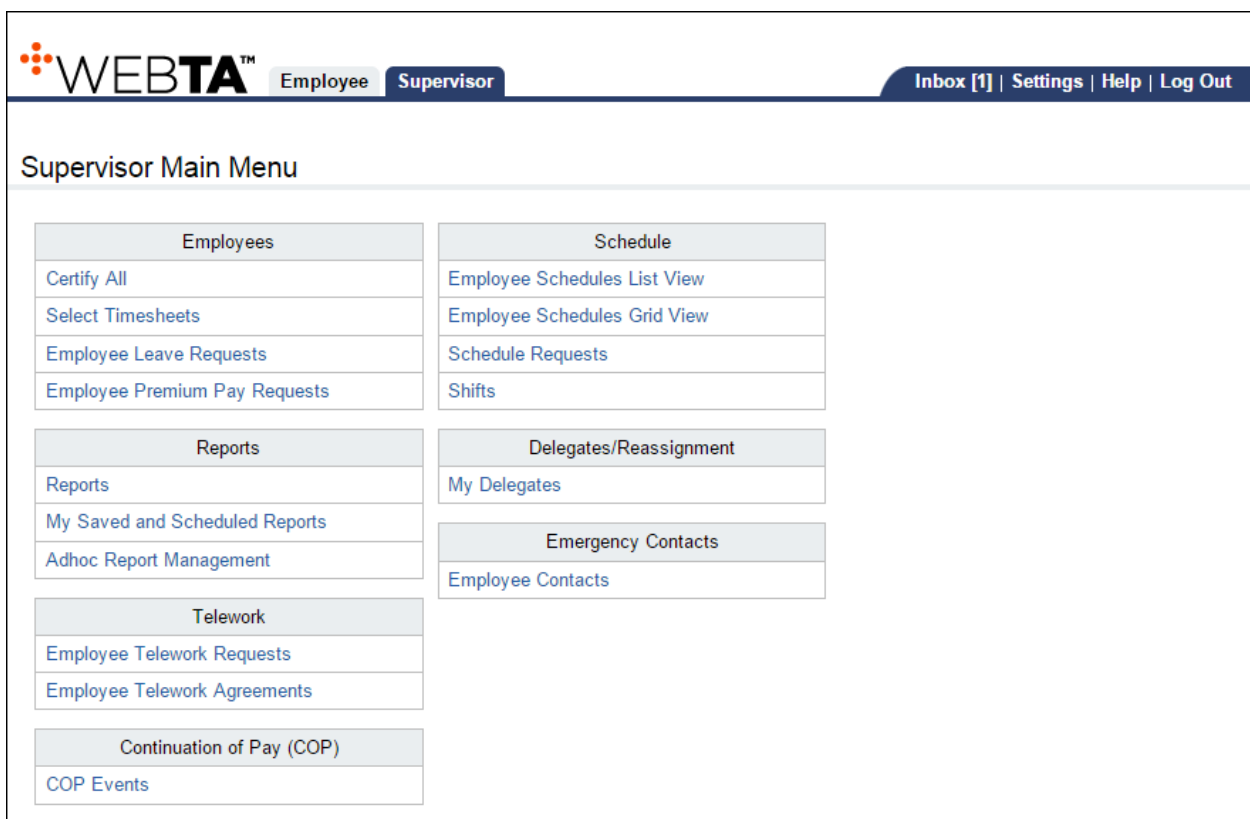
Introduction

The purpose of this guide is to reinforce concepts, tasks and procedures covered in your webTA training. It provides detailed, step-by-step instructions accompanied by screenshots, examples, and, where appropriate, Agency policy and processes.

The tasks in this guide are written for users assigned the Supervisor role in the webTA system. These tasks include certifying employee timesheets, responding to leave, premium pay, schedule, and telework requests, managing telework agreements, and running reports. Supervisors perform these functions on behalf of their assigned employees.

About the Supervisor Main Menu

The Supervisor main menu lists functions available to the Supervisor role. An example of the Supervisor main menu page is shown below.



Employees	Schedule
Certify All	Employee Schedules List View
Select Timesheets	Employee Schedules Grid View
Employee Leave Requests	Schedule Requests
Employee Premium Pay Requests	Shifts

Reports	Delegates/Reassignment
Reports	My Delegates
My Saved and Scheduled Reports	
Adhoc Report Management	

Emergency Contacts
Employee Contacts

Telework
Employee Telework Requests
Employee Telework Agreements

Continuation of Pay (COP)
COP Events

Timekeeping Cycle

The webTA system pay period schedule is based on the Agency's two-week pay period. For accurate payroll processing, employees are encouraged to maintain timesheets daily and promptly resolve system warnings or errors.

Employee and Timesheet Profiles

The system creates two profiles when a user is added to webTA: an employee profile and a timesheet profile. The employee profile identifies who the employee is (name, user ID), the role and licenses to which they have access, where they are assigned (agency), and to whom they are assigned (Timekeeper and Supervisor.) The timesheet profile identifies the employee's basic pay plan, employee status, leave-related information, and the method for working with accounts.

If the employee user data is imported, both profiles may be complete without the need for manual updates. If some of the required data is missing, you may need to update the employee profile and/or the timesheet profile. Until both profiles are complete, the employee's timesheet cannot be opened.

About Employee Profiles

The Employee Profile includes a separate page for each of the sections below:

- Settings
- Licenses
- Calendars
- Locator Info
- Roles
- Timesheet Details

For the most part, Supervisors have read-only access to employee and timesheet profiles. The only field that Supervisors can enable or disable in employee profiles is the Essential field on the General Settings page; this field indicates whether the employee is

Below is a sample Employee Profile > Settings page.

Supervisor Main Menu > Select Timesheets >

Employee Profile » Davis, Bunny

Settings »	No Time Tracking: <input type="checkbox"/>
Licenses	User ID: bdavis
Calendars	First Name: Bunny
Locator Info	Middle Name:
	Last Name: Davis
Roles	Active: <input checked="" type="checkbox"/>
Timesheet Details	Essential: <input type="checkbox"/>
Timesheet Profile	Timekeeper: White, Jay
Telework	Supervisor: Fryman, Christy
	Organization: DOC/BEA
	E-Mail Address: bdavis@fed.gov
	Timezone: GMT -5:00 Eastern Time (US & Canada), Bogota, Lima ▼
	Start Page: HighestRole

Employee Profile page contents--Settings page

- **No Time Tracking**. Identifies whether the user records time and attendance in webTA. (DOC agencies do not use this option.)
- **User ID**. The login ID for the employee.
- **Password**. The employee's webTA user password. Passwords must conform to Agency guidelines. Employees may update passwords on this page.
- **Name fields**. The employee's first, middle and last name.
- **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 webTA Emergency Contact Management (ECM) module is implemented and the employee has a license, the check box indicates that the employee is "essential" during an emergency. By default, the check box is blank and employees are classified as non-essential.
- **Timekeeper**. The employee's assigned Timekeeper.
- **Supervisor**. The employee's assigned Supervisor.
- **Organization**. The employee's assigned organization and agency.
- **E-mail Address**. The e-mail address that the employee has been assigned so they can send and receive webTA messages from the designated e-mail application. Employees may update their e-mail address.
- **Timezone**. The time zone in which the employee is located.
- **Start Page**. Specify the default role for the main menu, if the employee is assigned more than one role.

Licenses page contents

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

NOTE: Depending on which licenses are enabled, different options may appear on the sidebar menu. For example, if the webTA Telework license is enabled, the Telework profile option appears on the left side of the page.

Calendars page contents

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

Locator Info page contents

This page contains employee work address and contact information. Employees may update Locator Info fields.

Roles page contents

The Role Assignments page designates the role that the user will be assigned in webTA.

Timesheet Details page contents

The Timesheet Details page includes settings that determine whether data pre-populates in new timesheets.

Working with Employee Profiles

Viewing employee profiles

To view an employee profile, 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(s) you want to work with and then select **Employee Profile** from the Profiles and Settings action menu.
The Employee Profile page opens.
3. If you selected multiple records, use the arrows near the top and bottom of the page to go to the next or previous record.
–OR–
Click **Cancel** to go back to the previous page.

Editing employee profiles

Supervisors may enable or disable the Essential check box on the Settings page. To edit an employee profile, 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(s) you want to work with and then select **Employee Profile** from the Profiles and Settings action menu.
The Employee Profile page opens.
3. Make changes.
4. If you selected multiple records, use the arrows near the top and bottom of the page to go to the next or previous record.
–OR–
Click **Cancel** to go back to the previous page.

About Timesheet Profiles

Timesheet profiles identify the pay period, employee status, pay plan details, leave and other related details. All fields on the timesheet profile are read-only for employees and Supervisors.

The Timesheet Profile page is shown below.

Timesheet Profile » Davis, Bunny

- Settings
- Licenses
- Calendars
- Locator Info

- Roles
- Timesheet Details
- Timesheet Profile »**
- Telework

Items marked with an asterisk* are required.

Pay Period: 18 - 2015 : Sep 06, 2015-Sep 19, 2015

Status Change

Status Change Type: None
Status Change Day: None

Status

Oath of Office: false
Final Report: false
On Hold: false

Pay Details

Payplan: General Schedule (reg)
Tour of duty: Full Time
Duty Hours: 80
Work Week: 40
Alternative Work Schedule: Regular 8-hour Days

Overtime/Standby

RSO / Salary Cap: None
Standby Hours Week 1:
Standby Hours Week 2:
Standby AUO Percent:

Leave

Service Computation Date: Jan 01, 2011
Leave Category Override: Default (Based on SCD) (6 hours per pay period)
Leave Ceiling Override: (240:00 hours per year)
VLTP Recipient: No
ELTP Recipient: No
Home Leave Computation Date:
Home Leave Category: None
Home Leave End Date:
FMLA Invoked: false
FMLA Expiration Date:
FMLA Military Invoked: false
FMLA Military Expiration Date:
Military Regular Leave Flag: false
Military Emergency Leave Flag: false

Accounting

Accounting Type: Manual Account Entry

Pay Provider - NFC

Agency: CENS
State Code: Alabama
Town: 1111
Unit: 11
Timekeeper: 11
New Contact Point: false

Cancel

Timesheet Profile page contents

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

Pay Period

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

Status Change

- **Status Change Type**. Indicates the type of status change (Start or End) for mid-pay period accession and separations.
- **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 for payroll processing for the employee.

Pay Details

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

OT/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.
- **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).
- **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 (ELTP).
- **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.

NOTE: For Census Agency employees, the value in this field determines the employee's Division. The Division is the first segment of the Census Agency account string. The employee's Division is associated with a list of projects.

- **Timekeeper.** This data is populated from the Timekeeper's timekeeper profile.
- **New Contact Point.** Whether the contact information has been updated.

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.

About Telework Profiles

The telework profile is available for employees who are licensed to use the webTA Telework module. Supervisors may enable or disable the Telework Eligible and Do Not Delete Expired Agreements options, described below. The Telework page is shown below.

Timekeeper Main Menu > Select Timesheets >

Telework » Davis, Bunny

Settings
Licenses
Calendars
Locator Info

Roles
Timesheet Details
Timesheet Profile
Telework »

Telework Status
Telework Eligible:

Telework Agreement
Telework Ready:
Regular/Routine:
Situational/Ad Hoc:

Agreement Status: Approved
Agreement Start: 01/01/2015
Agreement Expires:
Do Not Delete Expired Agreements:

Save Cancel

Telework page contents

The Telework page contains these fields.

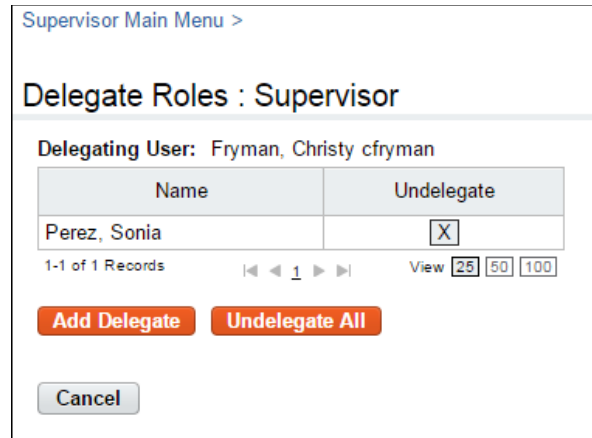
- **Telework Eligibility**. Whether the employee is eligible for telework as determined by their job responsibilities.
- **Telework Ready**. Whether the telework agreement has been approved.
- **Regular/Routine**. Whether the telework adheres to a regularly occurring schedule.
- **Situational/Ad Hoc**. Whether the telework is ad hoc, that is, it takes place at different times.
- **Agreement Status**. The status of the telework agreement. Statuses include: None, Pending, Approved, Denied, or Terminated.
- **Agreement Start**. The start date of the telework agreement.
- **Agreement Expires**. The expiration date of the telework agreement.
- **Do Not Delete Expired Agreements**. Whether expired agreements may be deleted from the system.

Managing Delegates

Supervisors may delegate their role to one or more alternate Supervisors. Delegates certify timesheets, respond to leave requests and premium pay requests for employees, or perform other tasks.

It's a good idea to delegate your role to at least one other Supervisor in the event that you are unable to perform tasks due to vacation, training or other off-site events. Delegation authority remains in effect until the delegate's name is removed from the list of assigned delegates.

A sample Delegate Roles page is shown below.



Working with Delegates

Adding delegates

To delegate your role, take these steps:

1. Click **My Delegates** on the Supervisor main menu.
The Delegate Roles page opens. A table lists users who have already been delegated as a backup.
2. Click **Add Delegate**.
The Add Delegate page opens. A table lists users who are qualified to be selected as delegates.
3. Click the check box next to user(s) you want to select as delegates and then click **Select Checked Users**.
A message confirms that the delegation was successful.
4. Add more delegates.
–OR–
Click **Cancel** to go back to the previous page.

Deleting delegates

To remove delegates from your role, take these steps:

1. Click **My Delegates** on the Supervisor main menu.
The My Delegates page opens. A table lists users who have already been delegated as a backup.
2. Click the "X" on the row that identifies the user you want to remove as a delegate.
A pop-up window opens.
3. Click **OK** to remove the delegate. A message confirms that the delegate was removed.
–OR–
Click **Cancel** to dismiss the operation.

Overview of the Select Timesheets page

The Select Timesheets page is useful for roles such as Timekeepers and Supervisors who perform tasks on behalf of assigned employees. The page includes search filters that help you quickly find people, timesheets, profiles, and schedules associated with specific pay periods, timesheets statuses, user IDs, organizations, and other characteristics.

When the system lists the search results, you use the Select Action options near the bottom of the page to perform tasks. Search filters and Select Action options are described below in more detail.

To open the Select Timesheets page, click **Select Timesheets** on the Supervisor main menu. An example Select **Timesheets** page is shown below.

Supervisor Main Menu >

Select Timesheets

Pay Period: 17 - 2015 : Aug 23, 2015-Sep 05, 2015 |
 Timesheet Status: Saved + All Validated |
 User ID: |
 Last Name: |
 First Name: |
 Organization: BEA

Timekeeper: |
 Supervisor: |
 Delegates For: NONE |
 Timesheet Type: All

<input type="checkbox"/>	Pay Period	Timesheet Status	User ID	Last Name	First Name	Organization	Timekeeper	Supervisor
<input type="checkbox"/>	17 - 2015	Saved	jblake	Blake	John	BEA	White, Jay	Fryman, Christy
<input type="checkbox"/>	17 - 2015	Saved	bdavis	Davis	Bunny	BEA	White, Jay	Fryman, Christy
<input type="checkbox"/>	17 - 2015	Saved	ehall	Hall	Ethan	BEA	White, Jay	Fryman, Christy
<input type="checkbox"/>	17 - 2015	Saved	mjohnson	Johnson	Mark	BEA	White, Jay	Fryman, Christy
<input type="checkbox"/>	17 - 2015	Saved	dmaynard	Maynard	Doris	BEA	White, Jay	Fryman, Christy
<input type="checkbox"/>	17 - 2015	Saved	sperez	Perez	Sonia	BEA	Maynard, Doris	Fryman, Christy

1-6 of 6 Records View

Select Action

Timesheets

- Timesheet
- Timesheet Summary
- Certify Selected
- Processed Timesheets

Profiles and Settings

- Timesheet Profile
- Work Schedules
- Default Timesheet Profile
- Employee Profile

Leave and Premium Pay

- Leave Balances
- Leave Calendar
- Leave Requests
- Premium Pay Requests

Send Messages

- Send Message

To search for employees, 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*.
 - **Pending Attestation.** Displays records with the timesheet status *Pending Attestation* (the timesheet is partially validated and must be affirmed.)
 - **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:** To view processed timesheets, 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 and Employee Validated.** Displays records that have been saved and/or validated by employees.
- **Saved and All Validated.** Displays records that have been saved and/or validated by Timekeepers.
- **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 one of the following types of timesheets:
 - **All.** Displays all timesheet types (Correction, Regular, and Invalid Timesheet Profile).
 - **Correction.** The timesheet was corrected after it was processed. The corrected timesheet has not yet been sent for re-processing.
 - **Regular.** The timesheet is an original timesheet.
 - **Invalid Timesheet Profile.** The timesheet cannot be opened because the user's timesheet profile is missing required data. The timesheet profile must be accurately completed and saved before it can be considered valid by the system.
 - **On Hold.** Displays timesheets that have been placed on hold. If the On Hold option is checked (Timesheet Profile > On Hold), the employee's timesheet is not transmitted to the payroll provider for processing. Users can save changes to timesheets that are on hold, but the timesheet cannot be validated nor processed.

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 and 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**.

Using search criteria in free-text fields

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

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

To enter text, numbers, or wildcards:

- By user ID: Type the 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 search field and then click **Search**. For example, type “Smith” and click **Search**. The system adds an implied asterisk wildcard at the end and matches employees with a last name of “Smith”, “Smithers”, “Smithson”, etc.
- For all Employees with the same first name: Type the name in the First Name search field, and then click **Search**. For example, type “Robert” and click **Search**. The system finds employees with the first name “Robert.”
- 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, take these steps:

1. Type search criteria in the **User ID, Last Name, First Name, Timekeeper, or Supervisor** fields and then click **Search**.
The system matches the criteria.
2. 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**.
The results display. For example, if you selected *Validated by Employee* from the Timesheet Status drop-down menu, timesheets with the current status *Validated by Employee* display.
3. To start over, click **Clear** and the page returns to its default state.

Using links on the Select Timesheets page

Pay periods and user IDs are available as hyperlinks on the Select Timesheets page. Below is a brief description of each link:

- **Pay period links**. Click a pay period link to open an employee’s timesheet. Depending on the status of the timesheet, a code may be appended to the end of the pay period date. Codes and corresponding descriptions are listed below:
(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 Select Actions menus

The Select Actions menus are located near the bottom of the Select Employees page. Supervisors may use the menu options to work with their assigned employees. Each menu and its functions are described below.

- **Timesheets**
 - Timesheet. Access one or several timesheets.
 - Timesheet Summary. View one or several Timesheet Summaries.
 - Certify Selected. Certify one or more selected timesheets that are ready to be certified.
 - Processed Timesheets. View timesheets that have been certified and processed.
- **Profiles and Settings**
 - Timesheet Profile. View one or several timesheet profiles.
 - Work Schedules. View, approve, deny or revert one or several schedules.
 - Default Timesheet Profile. View one or several default timesheet profiles.
 - Employee Profile. View one or several employee profiles.
- **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 and premium pay requests in a monthly calendar format.
 - Leave Requests. View, approve, deny or revert leave requests.
 - Premium Pay Requests. View, approve, deny or revert premium pay requests.
- **Messages**
 - Send Message. Send a message to one or more employees.

Employee Timesheets

Supervisors certify employee timesheets that have been validated by employees and/or Timekeepers. Here is an example of a timesheet that is ready to be certified.

Timesheet

Employee: Maynard, Doris
 Pay Period: 17 - 2015 : Aug 23, 2015-Sep 05, 2015 VT Select Pay Period

Timesheet Type: Regular
 Status: Validated

Transaction	Account	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27	Fri 8/28	Sat 8/29	Wk1	Sun 8/30	Mon 8/31	Tue 9/01	Wed 9/02	Thu 9/03	Fri 9/04	Sat 9/05	Wk2	Total
Time In / Time Out																		
Start Time																		
End Time																		
Work Time																		
01 - Regular Base Pay	010000001001 (BEA Administration)		8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00	8:00	8:00		40:00	80:00
Work Time Total			8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00	8:00	8:00		40:00	80:00
Time In / Time Out																		
Absence Start																		
Absence End																		
Leave Time																		
Leave Time Total																		
Daily Total			8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00	8:00	8:00		40:00	80:00
Dollar Transactions																		
Daily Total																		

Work Schedule

Schedule Week 1							Schedule Week 2						
Su	M	T	W	Th	F	Sa	Su	M	T	W	Th	F	Sa
08/23	08/24	08/25	08/26	08/27	08/28	08/29	08/30	08/31	09/01	09/02	09/03	09/04	09/05

Totals

Timesheet Totals		Transaction Totals	
Week One:	40:00	Transaction Code	Amount
Week Two:	40:00	01 - Regular Base Pay	80:00
Total Hours:	80:00		
Time In Pay:	80:00		
Other Time:	0:00		
Dollar Transactions:	\$0.00		
Days In Pay:	10		

Remarks

Pay Period Remarks

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

Leave Requests

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

Leave Data

Leave Type	Forward	Adj Forward	Accrued	Used	Adjustments	Expired	Capped	Balance	EOY Balance	Use or Lose
Annual Leave	0:00	0:00	4:00	0:00	0:00	0:00	0:00	4:00	40:00	0:00
Sick Leave	0:00	0:00	4:00	0:00	0:00	0:00	0:00	4:00	40:00	0:00

Timesheet Profile

Status Change Type: None	Home Leave Computation Date:
Status Change Day: None	Home Leave Category: None
Oath of Office: F	Home Leave End Date:
Final Report: False	FMLA Invoked: F
On Hold: F	FMLA Military Invoked: F
Payplan: General Schedule (reg)	FMLA Expiration Date:
Tour of duty: Full Time	FMLA Military Expiration Date:
Duty Hours: 80	Agency: BEA
Work Week: 40	State Code: Alabama
Alternative Work Schedule: Regular 8-hour Days	Town: 1111
RSO / Salary Cap: None	Unit: 11
Standby Hours Week 1:	New Contact Point: T
Standby Hours Week 2:	Timekeeper: 11
Standby AUO Percent:	Account:
Service Computation Date: 09/01/2015	Accounting Type: Manual Account Entry
Military Regular Leave Flag: F	Personal Leave Ceiling: 240:00
Military Emergency Leave Flag: F	Actual Leave Accrual Rate: 4 Hours/PP
Leave Category Override: Default (Based on SCD)	Vol. Leave Recipient: No
Leave Ceiling Override:	Eme. Leave Recipient: No

Activity Log

Action	Resulting State	Date	Name	Message
Validate	Validated By Timekeeper	09/14/2015 10:28 AM EDT	White, Jay	
Save	Timesheet Saved	09/14/2015 10:26 AM EDT	Maynard, Doris	
Save	Timesheet Saved	09/14/2015 10:24 AM EDT	White, Jay	

Your signature certifies that, to the best of your knowledge, all reported time was worked and approved according to law(s) and regulation(s).

Action Remarks:

Characters Remaining: 255

Certifying Employee Timesheets

After timesheets have been validated, Supervisors may certify an individual timesheet, several timesheets or certify all validated timesheets in one operation. The law requires that the data be certified as correct before issuance of pay. Therefore, webTA will not create the transmission record for an employee until it is certified by the Supervisor, one of their delegates, or a Master Supervisor.

Certifying and decertifying employee timesheets

To certify or decertify employee 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(s) you want to work with and then select **Timesheet** from the Timesheets menu.
The timesheet opens.
3. To certify the employee's timesheet, review the correctness of the employee's work and leave time, and then click **Certify**. The timesheet status changes to Certified.
If you are certifying several timesheets, click the arrow near the top of the timesheet to continue to the next timesheet; otherwise, click **Cancel** to return to the previous page.
4. To decertify the employee's timesheet, click **Reject/Decertify**.
The Reject Timesheet Certification page opens.
5. Type the reason for not certifying or for removing the certification from this timesheet. The explanation should be relatively short, but enter as much information as necessary to explain the situation. For example:
 - The 8 hours of annual leave reported on the first Monday should be a holiday
 - Overtime was not authorized on Saturday
6. Click **Save**.
The timesheet status changes to Unvalidated.
7. Click **Cancel** to return to the previous page.

Certifying timesheets in an employee group

To evaluate and certify all timesheets that qualify for certification without selecting employees, Supervisors may use the Certify All option. When you select Certify All, the system displays all timesheet summaries for timesheets in your employee group that are ready to be certified.

IMPORTANT! Be sure to allow enough time to certify all employees if you are working with a large employee group. The Certify All function displays all timesheets that are ready for certification; you may need to plan ahead to allow enough time to accurately review and certify each one.

A message near the top of the first Timesheet Summary displays the number of timesheets to be certified, for example, "Certifying 1 of 24 timesheets."

Near the bottom of the Timesheet Summary, the options **Next Timesheet** and **Previous Timesheet** let you view and work with the timesheets.

To certify all timesheets in an employee group, take these steps:

1. Click **Certify All** on the main menu.

The Timesheet Certification page opens for the first employee eligible for certification. Only records that have been validated successfully are displayed.

2. To certify the employee's timesheet, review the correctness of the employee's work and leave time, and then click **Certify**.

–OR–

To move to the next employee without taking any action, click **Next Timesheet**.

3. Repeat the preceding step for every employee in the group. You must review and click **Certify**, **Reject/Decertify**, or **Next Timesheet** for each employee.

IMPORTANT! Changes cannot be made by anyone during the current pay period once records are certified unless the certification is removed.

4. When you are done, click **Cancel** to go back to the previous page.

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 hours and associated daily totals
- Work schedule
- Weekly and biweekly totals
- Remarks
- Dollar transactions
- Mileage transactions
- Leave requests and status
- Premium pay requests and status
- Telework requests and status
- Leave transfer donations and status
- Leave data
- Timesheet profile data
- Continuation of Pay (COP) data
- Activity log of actions taken by other roles

A sample Timesheet Summary is shown below.

Timesheet Summary

Employee: Davis, Bunny
 Pay Period: 17 - 2015 - Aug 23, 2015-Sep 05, 2015 S

Timesheet Type: Regular
 Status: Unvalidated

Transaction	COP Event	Account	Sun 8/23	Mon 8/24	Tue 8/25	Wed 8/26	Thu 8/27	Fri 8/28	Sat 8/29	Wk1	Sun 8/30	Mon 8/31	Tue 9/01	Wed 9/02	Thu 9/03	Fri 9/04	Sat 9/05	Wk2	Total
Time In / Time Out																			
Start Time																			
End Time																			
Work Time																			
01 - Regular Base Pay		010000001001 (BEA Administration)	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		40:00	80:00
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		40:00	80:00

Time In / Time Out																			
Absence Start																			
Absence End																			

Leave Time																			
Leave Time Total			8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00	8:00	8:00			40:00	80:00
Daily Total			8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00	8:00	8:00			40:00	80:00

Dollar Transactions																			
Daily Total																			

Mile Transactions																			
Transaction	Account	Miles	Total	FY															
Total																			

Work Schedule

Schedule Week 1							Schedule Week 2						
Su	M	T	W	Th	F	Sa	Su	M	T	W	Th	F	Sa
08/23	08/24	08/25	08/26	08/27	08/28	08/29	08/30	08/31	09/01	09/02	09/03	09/04	09/05
	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00
	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00

Totals

Timesheet Totals		Transaction Totals	
Week One:	40:00	Transaction Code	Amount
Week Two:	40:00	01 - Regular Base Pay	80:00
Total Hours:	80:00		
Time In Pay:	80:00		
Other Time:	0:00		
Dollar Transactions:	\$0.00		
Days In Pay:	10		

Remarks

Pay Period Remarks	

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

Leave Requests

Date	Times	Hours	Transaction	Status	Approver
Fri 8/28	9:00am - 5:00pm	8:00	Annual Leave	Pending	

Premium Pay Requests

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

Leave Data

Leave Type	Forward	Adj Forward	Accrued	Used	Adjustments	Expired	Capped	Balance	EOY Balance	Use or Lose
Annual Leave	76:00	76:00	6:00	0:00	0:00	0:00	0:00	82:00	140:00	0:00
Sick Leave	48:00	48:00	4:00	0:00	0:00	0:00	0:00	52:00	88:00	0:00
Other Leave	8:00	8:00	0:00	0:00	0:00	0:00	0:00	8:00	16:00	0:00
COP Occurrence 1 08/10/2015	45	45	0	0	0	0	0	45	45	0

Timesheet Profile

Status Change Type: None	Home Leave Computation Date:
Status Change Day: None	Home Leave Category: None
Oath of Office: F	Home Leave End Date:
Final Report: False	FMLA Invoked: F
On Hold: F	FMLA Military Invoked: F
Payplan: General Schedule (reg)	FMLA Expiration Date:
Tour of duty: Full Time	FMLA Military Expiration Date:
Duty Hours: 80	Agency: CENS
Work Week: 40	State Code: Alabama
Alternative Work Schedule: Regular 8-hour Days	Town: 1111
RSO / Salary Cap: None	Unit: 11
Standby Hours Week 1:	New Contact Point: T
Standby Hours Week 2:	Timekeeper: 11
Standby AJO Percent:	Accounting Type: Manual Account Entry
Service Computation Date: 01/01/2011	Personal Leave Ceiling: 240:00
Military Regular Leave Flag: F	Actual Leave Accrual Rate: 6 Hours/PP
Military Emergency Leave Flag: F	Vol. Leave Recipient: No
Leave Category Override: Default (Based on SCD)	Eme. Leave Recipient: No
Leave Ceiling Override:	

Continuation of Pay

Date of Injury: 2015/08/10	COP Used to Date: 0
Injury Number: 0810	PP Forward Balance: 45
Return to Work Date: 2015/08/21	Used in PP: 0
COP Not to Exceed Date: 2015/08/28	PP Ending Balance: 45

Activity Log

Action	Resulting State	Date	Name	Message
Save	Timesheet Saved	09/02/2015 11:41 AM EDT	White, Jay	
Save	Timesheet Saved	09/02/2015 11:40 AM EDT	SYSTEM	

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 next to the employee(s) you want to work with, 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.
5. If you selected multiple employees, click the **Next** arrow near the top or bottom of the page to continue to the next Timesheet Summary.
6. When you are done, click **Cancel**.

About Processed Timesheets

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

Processed Timesheets

Year:

Pay Period	Dates
01 - 2015	Jan 11 - Jan 24
02 - 2015	Jan 25 - Feb 07
03 - 2015	Feb 08 - Feb 21
04 - 2015	Feb 22 - Mar 07
05 - 2015	Mar 08 - Mar 21
06 - 2015	Mar 22 - Apr 04
07 - 2015	Apr 05 - Apr 18
08 - 2015	Apr 19 - May 02

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Viewing processed timesheets

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

1. Click **Processed Timesheets** on the main menu.
The Processed Timesheets page opens.
2. Click the **pay period link** on the row that identifies the timesheet you want to view:
The Timesheet Summary page opens.
3. Click **Cancel** to return to the previous page.

Employee Schedules

Depending on your agency's implementation of webTA, employees have access to a default schedule or an advanced schedule. Default schedules provide basic schedule functionality while advanced schedules provide more robust options. The webTA Advanced Scheduling module must be implemented and the employee must have an Advanced Scheduling license in order to have an advanced schedule. Supervisors do not have system permissions to view or work with default schedules; instead, you may view, approve, deny or revert (change) advanced schedules.

About advanced schedules

Advanced schedules include features such as Regular Days Off, permanent and 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. The status bar in the upper right corner indicates the schedule was approved. The activity log near the bottom of the page identifies dates and names of users who performed the actions.

Supervisor Main Menu > Employee Schedules - List View > Schedule Assignment >

Schedule - Smith, Tina submitted approved **denied**

Name: Reg Weekly **Schedule Type:** Permanent
Description: **Schedule Status:** Approved
Start Date: Aug 23, 2015
End Date: Forever

Week One				
Day	Shift	RDO	Transaction Code	Hours
Sun				
Mon	9:00am-5:00pm		Regular Base Pay	8
Tue	9:00am-5:00pm		Regular Base Pay	8
Wed	9:00am-5:00pm		Regular Base Pay	8
Thu	9:00am-5:00pm		Regular Base Pay	8
Fri	9:00am-5:00pm		Regular Base Pay	8
Sat				
Week One TOTAL				40:00

Week Two				
Day	Shift	RDO	Transaction Code	Hours
Sun				
Mon	9:00am-5:00pm		Regular Base Pay	8
Tue	9:00am-5:00pm		Regular Base Pay	8
Wed	9:00am-5:00pm		Regular Base Pay	8
Thu	9:00am-5:00pm		Regular Base Pay	8
Fri	9:00am-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	09/02/2015 04:18 PM	Fryman, Christy	
Submit	Submitted	09/01/2015 02:05 PM	White, Jay	

About temporary and permanent advanced schedules

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 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:

- **Shifts.** A shift is the smallest segment of a schedule.
- **Schedule Requests.** Schedule requests are submitted by Timekeepers on behalf of their assigned employees. Supervisors may approve or deny schedule requests.
- **Employee Schedules List View.** The Schedules List View displays a high level summary of schedules assigned to employees. You may click user name links to view or work with schedules for their assigned employees.
- **Employee Schedules Grid View.** The Schedules Grid View displays employees and the daily shifts assigned to each employee for the specified pay period. You 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. Supervisors and Timekeepers may view the list of available shifts on the Shifts page, shown below.

Supervisor Main Menu >

Shifts

Name: Description: Start Time: Stop Time:

Transaction Code:

Name	Description	Shift Type	Start Time	Stop Time	Meal	Total Hours	Status	RDO	Transaction Code
Reg 4 Days 10 Hours		Regular	8:00am	6:00pm	--	10:00	Active		Base Pay Detail
Reg 8		Regular	9:00am	5:00pm	--	8:00	Active		Regular Base Pay

1-2 of 2 Records View

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.
- **Shift Type.** The following shift type options are available:
 - **Regular.** The shift begins and ends at specific times, for example, 8am - 5pm.
 - **Flex 1 Band.** The shift is a flexible schedule that does not have core hours.

- **Flex 3 Band.** The shift consists of one band of core hours and two bands of flexible hours.
- **Flex 5 Band.** The shift consists of two bands of core hours and three bands of flexible hours.

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

- **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 the Employee Schedules List View

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

Supervisor Main Menu >

Employee Schedules - List View

Employee Name: User ID: Pay Period: 18 - 2015 : Sep 06, 2015-Sep 19, 2015 Search Clear

Employee Name	User ID	Schedule	Total Hours	Status	Type
Blake, John	jblake	Reg 5 day	80:00	Approved	Permanent
Smith, Tina	tsmith	Reg Weekly	80:00	Approved	Permanent
Hall, Ethan	ehall	Reg 4 Day 10 Hours	80:00	Approved	Permanent
Johnson, Mark	mjohnson	None Assigned			

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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. Click the **schedule name link** to view the assigned schedule.
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. An example Employee Schedule Grid View page is shown below.

Supervisor Main Menu >

Employee Schedules - Grid View

Pay Period: 18 - 2015 : Sep 06, 2015-Sep 19, 2015

Employee Name	Hours	Sun 09/06	Mon 09/07	Tue 09/08	Wed 09/09	Thu 09/10	Fri 09/11	Sat 09/12	Sun 09/13	Mon 09/14	Tue 09/15	Wed 09/16	Thu 09/17	Fri 09/18	Sat 09/19
Blake, John	80		9a-5p	9a-5p	9a-5p	9a-5p	9a-5p			9a-5p	9a-5p	9a-5p	9a-5p	9a-5p	
Davis, Bunny															
Hall, Ethan	80		8a-6p	8a-6p	8a-6p	8a-6p				8a-6p	8a-6p	8a-6p	8a-6p		
Smith, Tina	80		9a-5p	9a-5p	9a-5p	9a-5p	9a-5p			9a-5p	9a-5p	9a-5p	9a-5p	9a-5p	
White, Jay															
TOTALS	240	0	26	26	26	26	16	0	0	26	26	26	26	16	0

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. Click the **schedule name link** to view the assigned schedule.
4. Click **Cancel** to return to the previous page

Working with advanced schedules

Supervisors are responsible for approving or denying schedules for their assigned employees. Permanent and temporary schedules include these features:

- A status bar in the upper right corner of the page identifies whether the schedule is pending, approved or denied.
- The Schedule Type indicates whether the schedule is permanent or temporary.
- An activity log near the bottom of the schedule shows a list of actions taken, the date of the action, and the name of the person who initiated the action.

The Schedule page is shown below.

Supervisor Main Menu > Schedule Requests >

Schedule - Davis, Bunny submitted approved denied

Name: Regular 5 Day Schedule Type: Permanent
Description: Schedule Status: Submitted
Start Date: Sep 06, 2015
End Date: Forever

Week One				
Day	Shift	RDO	Transaction Code	Hours
Sun				
Mon	9:00am-5:00pm		Regular Base Pay	8
Tue	9:00am-5:00pm		Regular Base Pay	8
Wed	9:00am-5:00pm		Regular Base Pay	8
Thu	9:00am-5:00pm		Regular Base Pay	8
Fri	9:00am-5:00pm		Regular Base Pay	8
Sat				
Week One TOTAL				40:00

Week Two				
Day	Shift	RDO	Transaction Code	Hours
Sun				
Mon	9:00am-5:00pm		Regular Base Pay	8
Tue	9:00am-5:00pm		Regular Base Pay	8
Wed	9:00am-5:00pm		Regular Base Pay	8
Thu	9:00am-5:00pm		Regular Base Pay	8
Fri	9:00am-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	09/14/2015 09:57 AM	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.

Approving or denying employee schedules

Supervisors are responsible for approving or denying schedules submitted by Timekeepers for their assigned employees.

NOTE: *Denied schedule requests cannot be changed (reverted) back to submitted status. Denied requests are permanently closed.*

To approve or deny an employee's schedule, take the following steps:

1. Click **Schedule Requests** from the Schedule section on the main menu.
The Schedule Requests page opens.
2. Click the **Status link** to open the employee's schedule.
The Schedule page opens.
3. Optionally, type a comment in the Approver Comments box.
4. Click **Approve** or **Deny**.
The action, date, time and name of the current user is recorded in the Activity Log near the bottom of the page.

Reverting employee schedules

Approved schedules may be changed (reverted) back to submitted status. To revert an employee's approved schedule to submitted status, take the following steps:

1. Click **Schedule Requests** from the Schedule section on the main menu.
The Schedule Requests page opens.
2. Click the **Status link** to open the employee's schedule.
The Schedule page opens.
3. Click **Revert to Submitted**.
The request changes back to submitted status. The Revert to Submitted button is replaced by the Approve and Deny buttons. The action, date, time and name of the current user is recorded in the Activity Log near the bottom of the page.

Employee Leave Balances

Supervisors may view employee leave balances. A sample Leave Balances page is shown below:

Supervisor Main Menu > Select Timesheets >

Leave Balances for Davis, Bunny

Balances for pay period: 16 - 2015 : Aug 09, 2015 - Aug 22, 2015

Leave Type	Accrual Leave Balances									
	Forward	Adj Forward	Accrued	Used	Expired	Adjustments	Capped	Balance	EOY Balance	EOY Use or Lose
Annual Leave	0:00	70:00	6:00	0:00	0:00	0:00	0:00	76:00	140:00	0:00
Sick Leave	0:00	44:00	4:00	0:00	0:00	0:00	0:00	48:00	88:00	0:00
Credit Hours	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Compensatory Time	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Compensatory Travel	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Compensatory Time Religious	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Shore Leave	0	0	0	0	0	0	0	0	0	0
Home Leave	0	0	0	0	0	0	0	0	0	0
Restored Annual Leave	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Time Off Award	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Military Regular Leave	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Military Emergency Leave	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Deferred Annual Leave	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Deferred Sick Leave	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
COP Occurrence 1 08/10/2015	0	0	45	0	0	0	0	45	45	0
COP Occurrence 2	0	0	0	0	0	0	0	0	0	0
COP Occurrence 3	0	0	0	0	0	0	0	0	0	0

Tracking Leave Balances			
Leave Type	Forward	Used	Used To Date
LWOP	0:00	0:00	0:00
AWOL	0:00	0:00	0:00
Suspension	0:00	0:00	0:00
Furlough	0:00	0:00	0:00
Family Friendly Sick Leave	0:00	0:00	0:00
Family Friendly Sick Leave Serious	0:00	0:00	0:00
FMLA	0:00	0:00	0:00
FMLA Military	0:00	0:00	0:00
Other Leave	0:00	8:00	8:00
VLTP Used	0:00	0:00	0:00
ELTP Used	0:00	0:00	0:00
Non-Pay For Accrual Leave	0:00	0:00	0:00

To view leave balance details by pay period, click the **leave type name link** in the Accrual Leave Balances table. The Details page opens, shown below.

Supervisor Main Menu > Select Timesheets > Leave Balances >

Details of Annual Leave for Davis, Bunny

Leave Balance Details

Pay Period	Date	Adjustment Type	Amount	Balance	Expiration Date
26-2015	01/09/2016	Timesheet Accrual	6:00	140:00	
25-2015	12/26/2015	Timesheet Accrual	10:00	134:00	
24-2015	12/12/2015	Timesheet Accrual	6:00	124:00	
23-2015	11/28/2015	Timesheet Accrual	6:00	118:00	
22-2015	11/14/2015	Timesheet Accrual	6:00	112:00	
21-2015	10/31/2015	Timesheet Accrual	6:00	106:00	
20-2015	10/17/2015	Timesheet Accrual	6:00	100:00	
19-2015	10/03/2015	Timesheet Accrual	6:00	94:00	
18-2015	09/19/2015	Timesheet Accrual	6:00	88:00	
17-2015	09/05/2015	Timesheet Accrual	6:00	82:00	
16-2015	08/22/2015	Timesheet Usage	0:00	76:00	
16-2015	08/22/2015	Timesheet Accrual	6:00	76:00	
16-2015	08/09/2015	Forward Adjustment	70:00	70:00	

1-13 of 13 Records View 25 50 100

Cancel

Leave Balance Details page contents

The Leave Balance Details table includes these columns:

- **Pay Period.** The pay period in which the adjustment occurs.
- **Date.** The effective date of the adjustment, usually the end of the pay period.
- **Adjustment Type.** The source of the system adjustment. For example, Timesheet Accrual, Timesheet Usage, or Forward Adjustment (for manual adjustments to the forward balance.)
- **Amount.** The amount of the adjustment.
- **Balance.** The new balance as a result of adding the adjustment amount.
- **Expiration Date.** The date on which some portion of the leave balance will expire. For example, this might be used for compensatory time and other leave types for which amounts that are accrued are forfeited if not used by a certain date.

Both system adjustments and manual adjustments are recorded under the Adjustment Type column. Examples of system adjustments include “Timesheet Accrual” and “Timesheet Usage.” An example of a manual adjustment is “Forward Adjustment.”

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(s) you want to work with and then select **Leave Balances** from the Leave and Premium Pay action menu.
The Leave Balances page opens.
3. Optionally, click the **leave type** to see details for a specific leave balance.
The Details page opens.
4. Click **Cancel** to go back to the previous page.

Employee Leave Requests

Supervisors approve or deny leave requests submitted by their assigned employees. Whether or not employees submit leave requests, leave transactions must be entered directly in the timesheet.

An employee leave request is shown below.

Leave Request Form

[Leave Balance Calculator](#)

Leave Type and Dates

Employee: Davis, Bunny

Leave Type:

Transaction Leave Balance: Annual Leave 88:00

Leave Request Times

* Start Date	* End Date	All Day	Start Time	Stop Time	Daily Hours	Total Hours	Action
Aug 28, 2015	Aug 28, 2015	<input checked="" type="checkbox"/>	9:00am	5:00pm	8:00	8:00	

Remarks

Submitter Remarks:

Approver Comments:

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	08/17/2015 02:27 PM	Davis, Bunny

Working with Employee Leave Requests

Viewing employee leave requests

To view an employee leave request, take these steps:

1. Click **Employee Leave Requests** on the main menu. The Leave Requests - Current page opens. The Leave Requests table displays current and future requests for your assigned employees.

Supervisor Main Menu >

Leave Requests - Current

Status	User	Start Date	End Date	Leave Type	Hours	Submission Date	Supervisor	Timekeeper
Pending	Davis, Bunny	08/28/2015	08/28/2015	Annual Leave	8:00	08/17/2015 02:27 PM	Fryman, Christy	White, Jay

1-1 of 1 Records

View 25 50 100

History View Calendar Cancel

–OR–

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

The Leave Requests - Current page opens. The Leave Requests table displays current and future requests for the specific employee that you selected.

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

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

–OR–

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

–OR–

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

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

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

Approving and denying employee leave requests

Supervisors may approve or deny employee leave requests. Denied requests require an explanation in the Approver Comments text field. To approve or deny a 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 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 work with.

The Leave Request Form page opens.

3. To approve the request, click **Approve**.

A message confirms the action. The Approve button is replaced by the Revert to Pending button. Click **Cancel** to go back to the previous page.

–OR–

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

A message confirms the action. Click **Cancel** to go back to the previous page.

Reverting leave requests to pending

Supervisors may change (revert) approved or denied leave requests to pending. To revert a 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 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 work with.

The Leave Request Form page opens.

3. Click **Revert to Pending** at the bottom of the page.

The request changes back to pending status. The Revert to Pending button is replaced by the Approve and Deny buttons. The employee may now update and resubmit or delete the request.

About the Request Calendar

The Request Calendar displays leave request and premium pay request information in the format of a monthly calendar.

NOTE: *The Request Calendar function supports viewing requests from multiple employees.*

A sample Request Calendar is shown below.

Leave Request Calendar View

View: A = Approved D = Denied P = Pending

◀ August 2015 ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26 July Pay Period 15	27	28	29	30	31	1 August
2	3	4	5	6	7	8
9 Pay Period 16	10	11	12	13	14 Davis, Bunny 8:00 (A)	15
16	17	18	19	20	21	22
23 Pay Period 17	24	25	26	27	28 Davis, Bunny 8:00 (P)	29

Tips on using the request calendar

Here are some tips on using the request calendar:

- Click the **Previous** and **Next** arrows near the top of the calendar to see previous and future months.
- Each request is preceded by one of the following request status codes: **A** (Approved), **D** (Denied), or **P** (Pending).
- To view details about a specific request, click the **Request link**. The Leave (or Premium Pay) Request Form page opens.
- Use the **View** drop-down list near the top of the calendar to filter requests.
 - To view requests from your assigned employees, select **My Employees**.
 - To view requests from your delegated employees, select **My Delegated Employees**.
 - To view requests from your employees as well as your delegated employees, select **All**.

Viewing employee request calendars

To view a request calendar for one or more employees, take these steps:

1. Click **Employee Leave Requests** on the main menu and then click **View Calendar**.

–OR–

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

The Request Calendar page opens.

2. Click the **request status link** that identifies the request you want to view.

The page opens.

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

Employee Premium Pay Requests

Supervisors may approve, deny or return to pending status employee premium pay requests. Whether or not employees submit premium pay requests, premium pay transactions must be entered directly in the timesheet.

An employee premium pay request is shown below:

Supervisor Main Menu > Premium Pay Requests >

Premium Pay Request Pending Approved Denied

Transaction and Dates

Employee: Davis, Bunny
 Transaction: 32 - Comp Time Earned

Premium Pay Request Times						
* Start Date	* End Date	Start Time	Stop Time	Daily Hours	Total Hours	Action
Aug 13, 2015	Aug 13, 2015	12:00am	3:00am	3:00	3:00	

Remarks

Submitter Remarks:

Approver Comments:

Activity Log

Action	Resulting State	Date	Name	Comments
Submit	Pending	08/17/2015 03:08 PM	Davis, Bunny	

Approve Deny Cancel

Working with Employee Premium Pay Requests

Viewing employee premium pay requests

To view an employee premium pay request, take these steps:

1. Click **Employee Premium Pay Requests** on the main menu. The Premium Pay Request Current page opens. The Premium Pay Requests table displays current and future requests for your assigned employees.

Supervisor Main Menu >

Premium Pay Request Current

Status	User	Start Date	End Date	Transaction	Total Hours	Submit Date	Supervisor
Pending	Davis, Bunny	08/13/2015	08/13/2015	Comp Time Earned	3:00	08/17/2015 03:08 PM	Fryman, Christy - cfryman

1-1 of 1 Records

View

–OR–

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

The Premium Pay Requests Current page opens. The Premium Pay Requests table displays current and future requests for the specific employee that you selected.

4. Click the **request status link** to open a request.

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

–OR–

Click **History** to view historical premium pay requests. The Premium Pay Requests – History page opens. The Premium Pay Requests – History table displays historical requests. Click **Current** to return to the Premium Pay Requests – Current page.

–OR–

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

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

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

Approving or denying employee premium pay requests

Supervisors may approve or deny employee premium pay requests. Denied requests require an explanation in the Approver Comments text field. To approve or deny a premium pay request, 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 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 - 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 **Approve**.

A message confirms the action. The Approve button is replaced by the Revert to Pending button. Click **Cancel** to go back to the previous page.

–OR–

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

A message confirms the action. Click **Cancel** to go back to the previous page.

Reverting premium pay requests to pending

Supervisors may change (revert) approved or denied premium pay requests to pending. To revert a leave request, 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 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 - Current page opens.

1. 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.

2. Click **Revert to Pending** at the bottom of the page.

The request changes back to pending status. The Revert to Pending button is replaced by the Approve and Deny buttons. The employee may now update and resubmit or delete the request.

Employee Telework Agreements and Requests

If the webTA Telework module has been implemented at your agency, the Telework section may appear on the Supervisor main menu.

Depending on whether employees telework on a regular basis or on an intermittent basis, the workflow varies slightly:

- Employees who telework intermittently on an ad hoc basis may submit one-time telework requests. The request is routed to the Supervisor for approval, and, if approved, the hours may be populated in the employee's timesheet. Intermittent telework is referred to in webTA as situational telework. The employee's Timekeeper may submit telework requests on behalf of employees. The system sends workflow notifications to the employee, Timekeeper and Supervisor as the request is routed.
- Employees who telework on a regular basis may be scheduled for telework using the default schedule or Advanced Scheduling. A request form is not required. Regularly occurring telework is referred to in webTA as regular or routine telework.

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

About telework agreements

Employees (or the employee's Supervisor) must submit a telework agreement for approval prior to performing intermittent or regular telework. An example Telework Agreement page is shown below:

Telework Agreement

Items marked with an asterisk* are required.

Agency Guidelines

Employee Information

* Employee: Smith, Tina tsmith

Search

Essential:

Medical Accommodation:

Telework Type

Regular/Routine:

Situational/Ad Hoc:

Agreement Dates

* Agreement Start: Sep 21, 2015

Agreement Expires: Month Day Year

Primary Telework Location

- Home
- Satellite Office
- Telework Center
- Other

Primary Telework Address and Phone

* Address 1: 55 Main Street

Address 2:

* City: Fairfax

* State: Virginia

* Zip: 01770

* Telework Phone: 555-555-5555

Telework Fax:

Mileage

Number of Miles Saved Per Day: 10.00

Requirements Completed

Telework Schedule

Telework Day: S M T W T F S S M T W T F S

Office Day: S M T W T F S S M T W T F S

Schedule Notes:

Text area for schedule notes

Characters remaining: 255

Other Comments

Remarks:

Text area for remarks

Characters remaining: 255

Approver Comments:

Text area for approver comments

Characters remaining: 255

Termination Details

Termination Date:

Reason: None

Termination Remarks:

Text area for termination remarks

Characters remaining: 255

Activity Log

Action	Resulting State	Action Date	Name	Remarks
Submit	Pending	09/14/2015 10:48 AM	Fryman, Christy	

Submit Approve Deny Printable Version Cancel

Telework Agreement page contents

Employee Information

- **Employee**. The employee's name and user ID.
- **Essential**. The check box is automatically populated from the employee's employee profile, where the Essential field may be enabled.
- **Medical Accommodation**. Whether a medical accommodation is under consideration so that the employee may telework.

Telework Type

- **Regular/Routine**. The employee performs telework on a consistent basis.
- **Situational/Ad Hoc**. The employee performs telework occasionally.

Agreement Dates

- **Agreement Start**. The date that the agreement begins. This is a required field.
- **Agreement Expires**. The date that the agreement is no longer valid.

Primary Telework Location

- The address, phone, and fax number where the telework takes place.

Mileage

- How many miles the employee saves from commuting each day.

Requirements Completed

Requirements are specific to each agency and are configured by the Telework Coordinator.

- **Requirement Check Box**. Enable the check box to indicate that the requirement has been met.
- **Date**. Enter the date that the requirement was met.

Telework Schedule

- Click the check boxes to identify telework days and office days. (This data is for informational purposes only.)

Other Comments

- **Remarks**. Type remarks pertinent to the agreement.
- **Approver Comments**. If the Supervisor denies the agreement, type the reason in this field.

Termination Details

This section is visible only to the employee, Supervisor, Telework Coordinator, and Telework Managing Officer.

- **Termination Date**. The date that the agreement was terminated.
- **Reason**. Use the drop-down list to specify a reason.
- **Termination Remarks**. Type remarks pertinent to the termination.

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

Supervisors may add, modify, delete, approve, deny, terminate, or revert telework agreements. (Reverting an agreement means that the agreement can be changed from approved or denied status back to pending status.)

Adding telework agreements

Employees and Supervisors may add and submit telework agreements. To add and submit a telework agreement, take these steps:

1. Click **Telework Agreements** under the Telework section on the main menu.
The Telework Agreements page opens.
2. Click **Add New Agreement**.
The Telework Agreement page opens.
3. Complete the fields.
4. Click **Submit**.
-OR-
Click **Cancel** to dismiss changes and return to the previous page.

Approving and denying employee telework agreements

Supervisors may approve or deny employee telework agreements. Denied agreements require an explanation in the Approver Comments text field. To approve or deny a telework agreement, take these steps:

1. Click **Employee Telework Agreements** under the Telework section on the main menu.
The Telework Agreements page opens.
2. Click the **telework agreement status link** on the row that identifies the agreement you want to work with.
The Telework Agreement page opens.
3. To approve the agreement, click **Approve**.
-OR-
To deny the request, type the reason in the Approver Comments text box and then click **Deny**.
A message confirms the action
4. Click **Cancel** to go back to the previous page.

Deleting telework agreements

Employees and Supervisors may delete telework agreements. Telework agreements must be in pending status before they can be deleted. Supervisors may revert telework agreements to pending status. Data from deleted telework agreements is removed from the webTA system.

To delete a telework agreement, take these steps:

1. Click **Employee Telework Agreements** under the Telework section on the main menu.
The Telework Agreements page opens.

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

The Telework Agreement page opens.

3. Click **Delete**.

A confirmation message appears.

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

–OR–

Click **Cancel** to dismiss the operation.

Modifying telework agreements

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

To modify a pending telework agreement, take these steps:

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

The Telework Agreements page opens.

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

The Telework Agreement page opens.

3. Make changes.

4. Click **Submit**.

–OR–

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

Reverting telework agreements

Supervisors may change (revert) approved or denied telework agreements to pending. To revert an agreement, take these steps:

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

The Telework Agreements page opens.

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

The Telework Agreement page opens.

3. Click **Revert to Pending**.

The system restores the agreement to Pending.

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

Terminating telework agreements

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

1. Click **Employee Telework Agreements** under the Telework section on the main menu.
The Telework Agreements page opens.
2. Click the **telework agreement status link** on the row that identifies the agreement you want to terminate.
The Telework Agreement page opens.
3. Type or specify a date in the **Termination Date** field.
4. Specify a reason from the **Reason** drop-down list.
5. Type a brief explanation in the **Terminator Remarks** text box.
6. Click **Terminate**.
A message confirms that the action was successful.

About telework requests

The Telework Requests - Current page displays approved, denied and terminated requests for the current and future pay periods, and pending requests from all pay periods. The Telework Requests - History page displays approved, denied and terminated requests for past pay periods. Supervisors may approve, deny or revert employee telework requests.

A sample Telework Request page is shown below.

Supervisor Main Menu > Telework Requests >

Telework Request Pending Approved Denied

Telework Type and Dates
Employee: Smith, Tina
Telework Code: 01 - Telework Home - Routine
Reason: Medical Reason
Reason Notes:

Start Date	End Date	Start Time	Stop Time	Daily Hours	Total Hours	Action
Sep 21, 2015	Sep 25, 2015	9:00am	5:00pm	8:00	40:00	

Remarks
Approver:
Comments:

Activity Log

Action	Date	Name	Comments
Submit	09/14/2015 01:07 PM	Smith, Tina	

Telework Request page contents

Telework Type and Dates

- **Employee**. The employee's name.
- **Telework Code**. The pay code to which telework hours will be charged.
- **Reason**. The reason that the employee is requesting telework.
- **Start and End Date**. The date that telework starts and ends.
- **Start and End Time**. The daily start and end time.
- **Daily Hours**. The daily total hours spent teleworking.
- **Total Hours**. The total hours of requested telework.

Remarks

- **Approver Comments**. Use the text box to type a comment or remark about the request.

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

Approving and denying employee telework requests

Supervisors may approve or deny employee telework requests. Denied requests require an explanation in the Approver Comments text field. To approve or deny a telework requests, take these steps:

1. Click **Employee Telework Requests** under the Telework section on the main menu.
The Telework Requests - Current page opens.
2. Click the **telework request status link** on the row that identifies the request you want to work with.
The Telework Request page opens.
3. To approve the request, click **Approve**.
-OR-
To deny the request, type the reason in the Approver Comments text box and then click **Deny**.
A message confirms the action
4. Click **Cancel** to go back to the previous page.

Reverting telework requests

Supervisors may change (revert) approved or denied telework requests to pending. To revert a request, take these steps:

1. Click **Employee Telework Requests** under the Telework section on the main menu.
The Telework Requests - Current page opens.
2. Click the **telework request status link** on the row that identifies the agreement you want to work with.
The Telework Request page opens.
3. Click **Revert to Pending**.
The system restores the request to Pending.
4. Click **Cancel** to go back to the previous page.

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.

Supervisors may view COP event information such as the date of injury, injury number, return to work date, COP not to exceed date, and COP used to date on the COP Event page.

Supervisor Main Menu >

COP Events

Employee	User ID	Injury Number	Date Of Injury	COP Status	Return to Work Date	COP Used to Date	COP NTE Date	Organization	Delete
Davis, Bunny	bdavis	0810	08/10/2015	Active	08/21/2015	0 Days	08/28/2015	BEA	X

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Additional details about COP balances are available on the employee’s timesheet summary under the Continuation of Pay section. Details include the pay period forward balance, the pay period ending balance, and the amount of COP used in the pay period.

Viewing COP events

To view COP events, take these steps:

1. Click **COP Events** from the Continuation of Pay (COP) section on the main menu.
The COP Events page opens.
2. Click the **employee name link** on the row that identifies the employee you want to view.
The COP Event Details page opens.
3. Click **Cancel** until you return to the main menu.

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. Click the **Leave Balances tab** to view COP leave balances.
–OR–
Click the check box next to the employee you want to work with and then select **Timesheet Summary** from the Timesheets menu. The Timesheet Summary opens. Scroll to the Continuation of Pay section to view balances for the specified pay period.
3. Click **Cancel** until you return to the main menu.

webTA Emergency Contacts

Agencies use the emergency contact management (ECM) function to store and retrieve emergency contact information for employees. Employees may add, edit and delete contact information. Supervisors may view emergency contact information for their assigned employees. A designated ECM Administrator has access to all employee contacts in the agency, and may also perform administrative tasks such as running emergency contact reports.

The Emergency Contacts page is shown below.

Supervisor Main Menu >

Emergency Contacts

Last Name: First Name: Organization:

Essential:

Last Name	First Name	Organization	Essential Employee	Last Updated
Blake	John	BEA	Non-Essential	Sep 1, 2015 8:01 AM
Davis	Bunny	BEA	Non-Essential	Aug 18, 2015 1:59 PM
Hall	Ethan	BEA	Non-Essential	Sep 1, 2015 8:09 AM
Johnson	Mark	BEA	Non-Essential	Sep 1, 2015 8:07 AM
Lewis	Emma	CENS	Non-Essential	Sep 1, 2015 12:44 PM
Maynard	Doris	BEA	Non-Essential	Sep 1, 2015 12:41 PM
Miller	Sam	CENS	Non-Essential	Aug 31, 2015 11:03 AM
Perez	Sonia	BEA	Non-Essential	Sep 1, 2015 8:04 AM
Singh	Sanjay	CENS	Non-Essential	Sep 8, 2015 2:42 PM
White	Jay	CENS	Essential	Sep 1, 2015 12:39 PM

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Viewing employee emergency contacts

To view contact information for employees, take these steps:

1. Click **Employee Contacts** from the Emergency Contacts section on the main menu.
The Emergency Contact page opens.
2. Click the **first name link** or **last name link** on the row that identifies the employee.
The Emergency Contacts for <employee name> page opens and contacts are listed.
3. Click **Cancel** to go back to the previous page.

Designating essential employees

Supervisors may designate whether employees are classified as “essential” under emergency conditions. If the ECM module and license is implemented, the Essential field appears on the Employee Profile Settings page. By default, the check box is disabled.

To designate essential employees, take these steps:

1. Click **Select Timesheets** from the main menu..
The Select Timesheets page opens.
2. Click the check box on the row that identifies the employee you want to work with, and then click **Employee Profile** from the Profiles and Settings action menu.
The Employee Profile opens to the Settings page.
3. Click to enable the **Essential** check box.
4. Click **Save** and then click **Cancel** to go back to the previous page.

Reports

Timekeepers may run, view, save or print webTA reports. The following webTA reports are available to Timekeepers:

- Default Schedules
- Employee Contacts
- Essential Employees
- Leave Audit
- Missing Contacts
- Roll Call
- Telework by Employee Report
- Telework Degree of Participation

Supervisor Main Menu >

Reports

Name	Description
Default Schedules	Default Schedule for users that meet Retain Data Type values
Employee Contacts	Listing of employee's emergency contacts
Essential Employees	Listing of all essential employees
Leave Audit	Leave Audit Report
Missing Contacts	Employees who do not have contact information for self and/or at least one emergency contact
Roll Call	Listing of all active employees - can be printed out to track employees in an emergency
Telework by Employee Report	Telework by Employee Report
Telework Degree Of Participation	Outlines total number of employees in an agency, how many are telework eligible, and how many are teleworking

My Saved and Scheduled Reports Cancel

Each report is described below, followed by topics on using report tools to save report output to different file formats, run reports in the background, and save and schedule reports.

Default Schedules

The Default Schedule report lists employees who use default schedules with one of the following options specified in Timesheet Details > Retain Data Type: Pay from Schedule, or Exception Processing.

Default Schedules PDF | Excel | HTML | CSV Background Execution ▼

Default Schedules

Employee	Work Schedule	Alt. Schedule	Project/Account	Week 1							Week 2							Total
				Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
Davis, Bunny - bdavis	Full Time	Regular 8-hour Days	010000001001	8:00	8:00	8:00	8:00	8:00			8:00	8:00	8:00	8:00	8:00		80:00	

Page 1

Run Report Cancel

To generate a Default Schedules report, take these steps:

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

The Reports page opens.

2. Click **Default Schedules**.

The page opens.

3. Click **Run Report**.

–OR–

Click the **PDF**, **Excel**, **HTML**, or **CSV link** in the upper right corner of the page to display the report output in the specified file type. A dialog displays options to open or save the output file.

–OR–

Click the **Background Execution** drop-down list and select an option. A message confirms that the report has been submitted. To access the report output, click **Cancel** to go back to the Reports page and then click **My Saved and Scheduled Reports** near the bottom of the page.

–OR–

Click **Schedule Report** to schedule the report to run on specific days and at specific times. (This option is available if the Advanced Reporting module has been implemented.)

Employee Contacts

The Employee Contacts report lists each employee's emergency contacts, including name, phone numbers and address.

[PDF](#) | [Excel](#) | [HTML](#) | [CSV](#)

Employee Contacts

Day Phone	Relation	Day Phone	Evening	Cell Phone	Email	Address
Blake, John - jblake		BEA				
Self	Self					
Davis, Bunny - bdavis		BEA				
Self	Self					bdavis@fed.gov

Page 1

Report Parameters

Report Header:

Organization: BEA Clear

Include Sub Orgs:

Employees: (0 selected) Remove All Search

Reset

Run Report Cancel

To generate an Employee Contacts report, take these steps:

1. Click **Reports** from the Reports section on the main menu.
The Reports page opens.
2. Click **Employee Contacts**.

The page opens:

3. Use the following parameters:

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

–OR–

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

- Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
- The Employees field lets you search for and select one or more employees using these options:
 - Click **Search** to select one or more employees for the report. The Select User page opens. Click the check box next to the names you want to choose. Click **Select Checked Users**. You return to the previous page and the Employees field is populated with the names.
 - Click **Remove User** next to names that you don't want to include in the report.

4. Click **Run Report**.

–OR–

Click the **PDF, Excel, HTML, or CSV link** in the upper right corner of the page to display the report output in the specified file type. A dialog displays options to open or save the output file.

–OR–

Click the **Background Execution** drop-down list and select an option. A message confirms that the report has been submitted. To access the report output, click **Cancel** to go back to the Reports page and then click **My Saved and Scheduled Reports** near the bottom of the page.

–OR–

Click **Schedule Report** to schedule the report to run on specific days and at specific times. (This option is available if the Advanced Reporting module has been implemented.)

Leave Audit Report

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

Leave Audit

Report Date: 09/10/2015
 Pay Period Range: 17 - 2015 : Aug 23, 2015-Sep 05, 2015 to 18 - 2015 : Sep 06, 2015-Sep 19, 2015
 Employee : Davis, Bunny

Pay Period	Manual Adj	Forward	Accrued	Available	Used	Balance	Max Available
18 - 2015	0:00	82:00	6:00	88:00	0:00	88:00	140:00
17 - 2015	0:00	76:00	6:00	82:00	0:00	82:00	140:00

Page 1

Report Parameters

Report Header:

From PP: 2015-17: Aug 23, 15 - Sep 05, 15 ▾

To PP: 2015-18: Sep 06, 15 - Sep 19, 15 ▾

Leave Type: Annual Leave ▾

Employee: Davis, Bunny - bdavis

The following columns are included in the Leave Audit Report:

- **Pay Period.** The pay period number followed by the pay year. For example, **22-2013**.
- **Manual Adjust.** Any adjustment that was made to the available leave in the pay period.
- **Forward.** The leave balance that was forwarded from the prior pay period.
- **Accrued.** The amount of leave accrued during the pay period. The column is blank for leave types that do not accrue, such as LWOP.
- **Available.** The total amount of leave that is available for use in the pay period. The column is blank for leave types that do not accrue, such as LWOP.
- **Used.** The amount of leave used by the employee in the pay period. This is usually the sum from the timesheet data submitted by the employee for the pay period. For annual leave and sick leave, it may also include LTP donations.
- **Balance.** The ending balance for the leave type in the pay period. This is usually the available leave minus the leave used. For non-accruable leave, this is usually the forwarded amount minus the used amount.
- **Maximum Available.** This column is included if the selected leave type is "Annual." It shows the maximum annual leave amount currently available. Usually, this is the sum of your current balance plus your projected accruals through the end of the Leave Year.

To generate a Leave Audit report, take these steps:

1. Click **Reports** from the Reports section on the main menu.
The Reports page opens.

2. Click **Leave Audit**.

The page opens.

3. Use the following parameters:

- Type optional text in the **Report Header** field. The text will appear in the report title.
- Select the pay period range from the **From PP** and **To PP** drop-down lists.
- Click the **Leave Type** drop-down list to select the type of leave.
- Click **Search** next to the Employee field. The Select User page opens. Click **Select** on the row that identifies the employee. You return to the Report Parameters page and the Employee field populates with the selected name.

4. Click **Run Report**.

–OR–

Click the **PDF**, **Excel**, **HTML**, or **CSV link** in the upper right corner of the page to display the report output in the specified file type. A dialog displays options to open or save the output file.

–OR–

Click the **Background Execution** drop-down list and select an option. A message confirms that the report has been submitted. To access the report output, click **Cancel** to go back to the Reports page and then click **My Saved and Scheduled Reports** near the bottom of the page.

–OR–

Click **Schedule Report** to schedule the report to run on specific days and at specific times. (This option is available if the Advanced Reporting module has been implemented.)

Missing Contacts

The Missing Contacts report lists employees who have not provided personal contact information and/or at least one emergency contact. The report displays the employee's name and assigned organization.

Missing Contacts PDF | Excel | HTML | CSV

Missing Contacts

Employee Name	Organization
Blake, John	BEA
Davis, Bunny	BEA
Hall, Ethan	BEA
Johnson, Mark	BEA
Maynard, Doris	BEA
Perez, Sonia	BEA

Page 1

Report Parameters

Report Header:

Organization: BEA Clear

Include Sub Orgs:

Reset

Run Report Cancel

To generate a Missing Contacts report, take these steps:

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

The Reports page opens.

2. Click **Missing Contacts**.

The page opens:

3. Use the following parameters:

- Select an organization:

Optionally, accept the default organization.

–OR–

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

- Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)

4. Click **Run Report**.

–OR–

Click the **PDF, Excel, HTML, or CSV link** in the upper right corner of the page to display the report output in the specified file type. A dialog displays options to open or save the output file.

–OR–

Click the **Background Execution** drop-down list and select an option. A message confirms that the report has been submitted. To access the report output, click **Cancel** to go back to the Reports page and then click **My Saved and Scheduled Reports** near the bottom of the page.

–OR–

Click **Schedule Report** to schedule the report to run on specific days and at specific times. (This option is available if the Advanced Reporting module has been implemented.)

Roll Call

The Roll Call report lists all active employees and their organizations. In an emergency, the printed report includes columns for checking off employees who are present or absent, and to enter a reason for their absence if known.

[PDF](#) | [Excel](#) | [HTML](#) | [CSV](#)

Roll Call

Employee Name	Organization	Status	Present	Not Present / Why
Blake, John	BEA	Active		
Davis, Bunny	BEA	Active		
Hall, Ethan	BEA	Active		
Johnson, Mark	BEA	Active		
Maynard, Doris	BEA	Active		
Perez, Sonia	BEA	Active		

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Report Parameters

Report Header:

Organization: [BEA](#) Clear

Include Sub Orgs:

Users: Active ▼

Reset

Run Report Cancel

To generate a Roll Call report, take these steps:

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

The Reports page opens.

2. Click **Roll Call**.

The page opens:

3. Use the following parameters:

- Accept the organization.

–OR–

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

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

4. Click **Run Report**.

–OR–

Click the **PDF**, **Excel**, **HTML**, or **CSV link** in the upper right corner of the page to display the report output in the specified file type. A dialog displays options to open or save the output file.

–OR–

Click the **Background Execution** drop-down list and select an option. A message confirms that the report has been submitted. To access the report output, click **Cancel** to go back to the Reports page and then click **My Saved and Scheduled Reports** near the bottom of the page.

–OR–

Click **Schedule Report** to schedule the report to run on specific days and at specific times. (This option is available if the Advanced Reporting module has been implemented.)

Telework by Employee Report

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

[PDF](#) | [Excel](#) | [HTML](#) | [CSV](#)

Telework by Employee Report

Click one of the report links to export the report.

Report Parameters

Report Header:

Organization: [BEA](#) [Clear](#)

Include Sub Orgs:

From PP:

To PP:

Transaction Code:

[Reset](#)

[Run Report](#) [Cancel](#)

To generate a Telework by Employee report, take these steps:

1. Click **Reports** from the Reports section on the main menu.
The Reports page opens.
2. Click **Telework by Employee**.
The page opens:
3. Use the following parameters:
 - Type optional text in the **Report Header** field. The text will appear in the report title.
 - Accept the 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 pay period range. Select the starting pay period from the **From PP** drop-down list and the ending pay period from the **To PP** drop-down list.
 - Select a telework code from the **Transaction Code** drop-down list.
4. Click **Run Report**.
- The following message displays: **Click one of the report links to export the report.**
5. Click the **PDF**, **Excel**, **HTML**, or **CSV link** in the upper right corner of the page to display the report output in the specified file type. A dialog displays options to open or save the output file.

Telework Degree of Participation

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

Telework Degree Of Participation PDF | Excel | HTML | CSV Background Execution ▼

Telework Degree Of Participation

From Date	To Date	Total # Active Employees	Total # Employees Eligible to Telework	Percent Employees Eligible to Telework	LESS_THAN 3 Day(s) Per PAY_PERIOD
2015/09/01	2015/09/14	11	4	36.36%	0

Page 1

Report Parameters

Report Header:

Organization: **DOC** Clear

Include Sub Orgs:

From Date:

To Date:

Telework Frequency: Day(s) Per

Reset

Run Report Cancel

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

1. Click **Reports** from the Reports section on the main menu.
The Reports page opens.
2. Click **Telework Degree of Participation**.
The page opens:
3. Use the following parameters:
 - Type optional text in the **Report Header** field. The text will appear in the report title.
 - Accept the 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 pay period range. Select the starting pay period from the **From PP** drop-down list and the ending pay period from the **To PP** drop-down list.
- Select the telework frequency from the **Telework Frequency** drop-down list.
- Type the number of days in the **Day(s) Per** field.
- Select the frequency from the **Frequency** drop-down list

4. Click **Run Report**.

–OR–

Click the **PDF, Excel, HTML, or CSV link** in the upper right corner of the page to display the report output in the specified file type. A dialog displays options to open or save the output file.

–OR–

Click the **Background Execution** drop-down list and select an option. A message confirms that the report has been submitted. To access the report output, click **Cancel** to go back to the Reports page and then click **My Saved and Scheduled Reports** near the bottom of the page.

–OR–

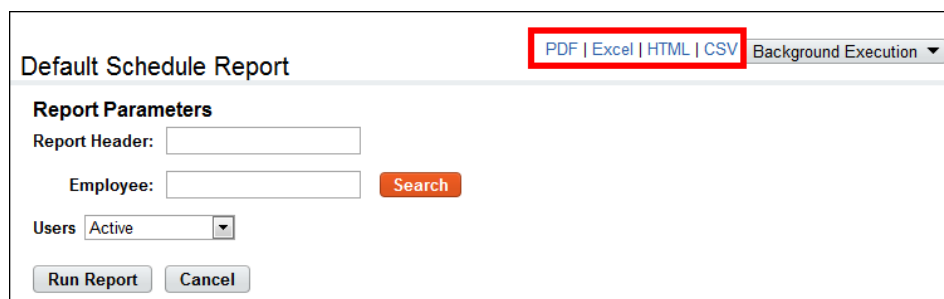
Click **Schedule Report** to schedule the report to run on specific days and at specific times. (This option is available if the Advanced Reporting module has been implemented.)

Saving report output to files

Options are available for saving reports in the following file types:

- PDF
- Excel
- HTML
- CSV

An example report page is shown below. The output options are in the upper right corner.



The screenshot shows a web interface titled "Default Schedule Report". In the top right corner, there are links for "PDF | Excel | HTML | CSV" which are highlighted with a red box, and a "Background Execution" dropdown menu. Below this is a "Report Parameters" section with the following fields: "Report Header:" with a text input, "Employee:" with a text input and a "Search" button, and "Users" with a dropdown menu set to "Active". At the bottom of the form are two buttons: "Run Report" and "Cancel".

To save a report in a PDF, Excel, HTML or CSV file, take these steps:

1. Run the report.

The report output appears.

2. Click the **PDF**, **Excel**, **HTML** or **CSV link** in the upper right corner of the Report page.

A dialog opens with options to view or save the output file.

3. Select an option.

–OR–

Click **Cancel** to dismiss the action.

About the Background Execution option

You may also run and save reports using the Background Execution option. Use this option if you want to be able to continue working in webTA without waiting for the report to finish. The Background Execution drop-down list is shown below.

The screenshot shows a web interface titled "Default Schedule Report". In the top right corner, there are links for "PDF | Excel | HTML | CSV" and a dropdown menu labeled "Background Execution". The dropdown menu is open, showing a list of options: PDF, Excel, CSV, HTML, Emailed PDF, Emailed Excel, Emailed CSV, and Emailed HTML. Below the dropdown, the "Report Parameters" section includes a "Report Header:" text box, an "Employee:" text box with a "Search" button, and a "Users" dropdown menu set to "Active". At the bottom, there are "Run Report" and "Cancel" buttons.

The Background Execution drop-down list includes the following options:

- PDF
- Excel
- HTML
- CSV
- Emailed PDF
- Emailed Excel
- Emailed HTML
- Emailed CSV

The e-mail option sends the report to the e-mail address in your Employee Profile. Monitor the status of reports executed in the background on the My Saved and Scheduled Reports page.

About My Saved and Scheduled Reports

The My Saved and Scheduled Reports page shows a list of reports generated using the Background Execution. Use the My Saved and Scheduled Reports page to view reports in PDF, Excel, HTML or CSV file format, view the status of a report that has been submitted, download reports, delete reports, e-mail a report to yourself, or rerun reports.

The My Saved and Scheduled Reports page is shown below.

My Saved and Scheduled Reports

Status: All

<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	Sep 10, 2015 8:36:32 AM	Sep 10, 2015 8:36:43 AM	No Schedule	PDF	Complete	1	36122		<input type="button" value="Download"/>	<input type="button" value="ReRun Now"/>	<input type="button" value="X"/>

1-1 of 1 Records View

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 has not 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**. The name of the report
- **Report Name**. The name of the report.
- **Submitted**. The date and time that the report was submitted for execution.
- **Completed**. The date and time that the report finished.
- **Next Scheduled Date**. The date and time the report is next scheduled to run. (This option is only available with Advanced Reporting.)
- **Format**. The type of report output file. Options include: PDF, Excel, HTML, or CSV.
- **Status**. The current status of the report.
- **Pages**. The number of pages in the 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 again.

Downloading reports

To download a report from the My Saved and Scheduled Reports table, 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 **Download** on the row that identifies the report.
The File Download dialog opens.

3. Click **Open** to open the output file.

–OR–

Click **Save** to save the output file to a location on your PC.

–OR–

Click **Cancel** to cancel the operation.

E-mailing reports

To e-mail a report to yourself from the My Saved and Scheduled Reports table, 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**.
A confirmation message appears.
3. Click **Yes** to e-mail the report.

–OR–

Click **No** to cancel the operation.

Deleting reports

To delete reports from the My Saved and Scheduled Reports table, 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**.
–OR–
Click the "X" on the row that identifies the report.
A confirmation message appears.
3. Click **Yes** to delete the report.

–OR–

Click **No** to cancel the operation.

Rerunning reports

To rerun a report listed on the My Saved and Scheduled Reports table, 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 **Rerun Now** on the row that identifies the report.
A message confirms that the report has been submitted for execution.
3. Click **Cancel** to go back to the previous page.