Kronos webTA 4.2

DOC HR Administrator User Guide

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Document Revision History

Document Revision	Product Version	Release Date
A	Version 4.2.6	September 2015

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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.

Depending on how the role is set up, the HR Administrator may have different responsibilities within the system. The following HR Administrator role properties may be enabled on the Role Assignments tab:

- Account Menu Off. Gives the HR Administrator access to the Manage Accounts function on the main menu. **NOTE**: *Census HR Administrators do not have access to the Manage Accounts option.*

- Agency. The HR Administrator may edit user profile and timesheet data for employees assigned to the same agency as the HR Administrator.

- Org Tree Menu On. Gives the HR Administrator access to the Organization Management function on the main menu.

- LTP Menu On. Gives the HR Administrator access to the Leave Transfer Program function on the main menu.

- Department. The HR Administrator may edit all employee records in the system. This is the default option for this role.

An example of the HR Administrator main menu page is shown below. In this example, the Org Tree Menu and LTP Menu are enabled, and the Department role property is enabled.

NOTE: Census HR Administrators do not have access to the Manage Accounts option.

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.

Working with Users and 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

Below is a sample Employee Profile > Settings page:

```
HR Administrator Main Menu > Employees >

Employee Profile » Davis, Bunny

Settings »          Items marked with an asterisk* are required.
Licenses            No Time Tracking: ☐
Calendars               * User ID: bdavis
Locator Info
                         Password:

Roles                Retype Password:
Timesheet Details    * First Name: Bunny
Telework
                      Middle Name:

                     * Last Name: Davis

                           Active: ☑
                        Essential: ☐
                    * Timekeeper: White, Jay        [Search for Timekeeper]
                     * Supervisor: Fryman, Christy   [Search for Supervisor]
                     Organization: DOC/BEA [Find Organization]
                   E-Mail Address: bdavis@fed.gov
                         Timezone: GMT -5:00 Eastern Time (US & Canada), Bogota, Lima  ▼
                       Start Page: Highest Role Menu ▼

                            [Save]  [Cancel]
```

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

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

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

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

    The Employees page opens.

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

    The Employee Profile page opens.

3. Click **Licenses** from the sidebar menu.

    The Licenses page opens.

4. Click the **check box** next to each license that the employee will use.

5. Click **Save**.

    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 all calendars to which the employee may be assigned.

The Calendars page lists calendars or unfunded mandate calendars that may be assigned to the employee. To assign a calendar, take these steps:

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

   The Employees page opens.

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

   The Employee Profile page opens.

3. Click **Calendars** from the Employee Profile Settings sidebar menu.

   The Calendars page opens.

4. Click the **check box** next to each calendar that the employee will use.

5. Click **Save**.

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. The Role Assignments page is shown below.

Some roles have optional properties, described below.

Employee property

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

Timekeeper property

- **Local Corrections**. Gives the Timekeeper the ability to make corrections to timesheets; the corrections are strictly for agency purposes and will not be transmitted for processing by NFC.

Master Timekeeper properties

Master Timekeepers may work with their own personal records from the Select Timesheets page, regardless of the properties selected below.

- **Local Corrections**. Gives the Master Timekeeper the ability to make corrections to timesheets; the corrections are strictly for agency purposes and will not be transmitted for processing by NFC.
- **Editable**. Gives the Master Timekeeper the ability to edit user profile and timesheet data for employees who are in the same direct organization as the Master Timekeeper.
- **Department (Read Only)**. The Master Timekeeper has read-only access to all employee records in the system.
- **Department (Editable)**.The Master Timekeeper may edit all employee records in the system. This is the default option for this role.
- **Agency (Read Only)**. The Master Timekeeper has read-only access to employees who are assigned to the same agency as the Master Timekeeper.
- **Agency (Editable)**. The Master Timekeeper may edit user profile and timesheet data for employees who are assigned to the same agency as the Master Timekeeper.

Master Supervisor properties

Master Supervisors may work with their own personal records from the Select Timesheets page, regardless of the properties selected below.

- **Department**. The Master Supervisor may edit all employee records in the system. This is the default option for this role.
- **Agency**. The Master Timekeeper may edit user profile and timesheet data for employees who are assigned to the same agency as the Master Supervisor.

HR Administrator properties

HR Administrators may work with their own personal records and the records of active and inactive employees from the Select Timesheets page, regardless of the properties selected below.

- **Account Menu Off**. Gives the HR Administrator access to the Manage Accounts function on the main menu.
- **Agency**. The HR Administrator may edit user profile and timesheet data for employees who are assigned to the same agency as the HR Administrator.
- **Org Tree Menu On**. Gives the HR Administrator access to the Organization Management function on the main menu. .
- **LTP Menu On**. Gives the HR Administrator access to the Leave Transfer Program function on the main menu.
- **Department**. The HR Administrator may edit all employee records in the system. This is the default option for this role.

To enable roles for an employee, take these steps:

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

   The Employees page opens.

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

The Employee Profile page opens.

3. Click **Roles** from the Employee Profile Settings sidebar menu.

   The Roles page opens.

4. Click the **check box** next to each role that the employee will use.

5. Click **Save**.

Timesheet Details page contents

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

- **Retain Data Type**. These options determine what data, if any, the system uses to populate new timesheets.
  - **None**. New timesheets are blank.
  - **Entries Only – No Times**. Work entries from the previous pay period's timesheet are copied into the employee's timesheet when the new pay period begins; hours are not carried over. For example, if you select Regular as the time type and a specific BLI in the previous pay period, the new timesheet would contain these entries; it would not include any hours.
  - **All**. Work entries and hours from the previous pay period's timesheet are copied into the employee's timesheet when the new pay period begins; hours are carried over. For example, if you select Regular as the time type in the previous pay period, the new timesheet would contain these entries; it would also include hours.
  - **Pay from Schedule**. Hours and time types from the default schedule are copied into the employee's timesheet when the new pay period begins. For example, if the schedule is set up with 8 hours of RT daily, the timesheet is populated with the same time type and hours.

    If the employee's actual hours or time type differs from the default schedule, the employee may edit the timesheet so that the actual entries are recorded.

  - **Exception Processing**. Hours and time types from the default schedule are copied into the employee's timesheet when the new pay period begins. For example, if the schedule contains 80 hours of Regular Time, the timesheet is populated with the same time type and hours.

    If the employee's actual hours or time type differs from the default schedule, the employee must record the deviation (also called an "exception") directly in the timesheet. The entries in

the timesheet will be automatically adjusted. For example, if Monday contains 8 hours of Regular Time from the default schedule, and the employee enters 4 hours of Annual Leave, the Regular Time entry is reduced from 8 hours to 4 hours, maintaining a total of 8 hours for the day.

- **Start Pay Period for Timesheet**. The starting pay period in which the timesheet will be available. The default is the current pay period. A previous pay period or the current pay period may be specified.
- **Timesheet Entry Type**. Select Hours for duration-based timesheets or Time In/Time Out for punch-based timesheets.
- **Approvers**. These options designate who will validate and certify the employee's timesheet.
    - **Timekeeper**. The timekeeper to whom the employee is assigned. Click **Search for Timekeeper** to locate the timekeeper's name. The Select User page opens. Click **Select** on the row that identifies the Timekeeper. You return to the previous page and the name appears in the field.
    - **Supervisor**. The supervisor to whom the employee is assigned. Click **Search for Supervisor** to locate the supervisor's name. The Select User page opens. Click **Select** on the row that identifies the Supervisor. You return to the previous page and the name appears in the field.

To specify timesheet details, take these steps:

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

    The Employees page opens.

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

    The Employee Profile page opens.

3. Click **Timesheet Details** from the sidebar menu.

    The Timesheet Details page opens.

4. Select options.

5. Click **Save**.

Working with Employee Profiles

Adding employees

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

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

    The Employee Profile >> New User page opens.

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

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

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

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

5. Continue specifying additional information.

   –OR–

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

Viewing employee profiles

To view an employee profile, take these steps:

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

   The Employees page opens.

2. Click the check box next to the employee you want to work with and then select **Employee Profile** from the Profiles and Settings action menu.

   The Employee Profile page opens.

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

Editing employee profiles

To edit an employee profile, take these steps:

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

   The Employees page opens.

2. Click the check box next to the employee 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. 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.

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: ☐
Final Report: ☐
On Hold: ☐

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: Month Day Year   📅
Home Leave Category: None ▾
Home Leave End Date: Month Day Year   📅
FMLA Invoked: ☐
FMLA Expiration Date: Month Day Year   📅
FMLA Military Invoked: ☐
FMLA Military Expiration Date: Month Day Year   📅
Military Regular Leave Flag: ☐
Military Emergency Leave Flag: ☐

Accounting

Accounting Type: Manual Account Entry ▾

Pay Provider - NFC

* **Agency:**   CENS ▾
* **State Code:**   Alabama ▾
* **Town:**   1111
* **Unit:**   11
* **Timekeeper:**   11
New Contact Point: ☐

[Split Profile]   [Save]   [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 Recipien**t. 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 Telework Profiles

The telework profile is available for employees who are licensed to use the webTA Telework module. The Telework page is shown below.

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

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

Adding delegates

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

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

   NOTE: *Optionally, select Manage Supervisor Delegates.*

   The Delegate Roles page opens.

2. Click **Search** next to the Delegating User field.

   The Select User - Choose a Timekeeper page opens. A table lists users who are qualified for delegation.

3. Click **Select** on the row that identifies the Timekeeper for whom you want to delegate another Timekeeper.

   You return to the Delegate Roles page and the Delegating User field populates with the name you selected. A table lists users who have already been delegated as a backup for the Timekeeper.

4. Click **Add Delegate**.

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

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

   You return to the Delegate Roles page and the table populates with the name you selected. A message confirms that the delegation was successful.

6. Add more delegates.

   –OR–

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

Deleting delegates

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

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

   NOTE: *Optionally, select Manage Supervisor Delegates.*

   The Delegate Roles page opens.

2. Click **Search** next to the Delegating User field.

   The Select User - Choose a Timekeeper page opens. A table lists users who have delegates.

3. Click **Select** on the row that identifies the Timekeeper from whom you want to remove a delegate

The Delegate Roles page opens. A table lists users who have already been delegated as a backup.

4. Click the "**X**" on the row that identifies the person you want to remove as a delegate.

   A pop-up confirmation dialog opens.

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

   –OR–

   Click **Cancel** to dismiss the operation.

Reassigning employees to Timekeepers

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

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

   The Select User page opens. A table lists users with the Timekeeper role.

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

   The table refreshes.

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

   A message confirms that the employees were reassigned.

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

Reassigning employees to Supervisors

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

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

   The Select User page opens. A table lists users with the Supervisor role.

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

   The table refreshes.

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

   A message confirms that the employees were reassigned.

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

Managing Accounts

HR Administrators may add, edit, and delete accounts. An example account Field Values page is shown below.

NOTE: *Census HR Administrators do not have access to the Manage Accounts option.*

Field Values display contents

- **Valid From** and **Valid To**. The time frame that the system refers to when applying the definition.

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

- **Description**. The description of the value.

- **Enabled**. Whether the value is active in the system. Disabled values are no longer available to users but remain in the system.

- ~~**Display Order**. Type a positive or negative integer to change the order in which the value is listed.~~

- **Groups**. Optionally, assign the value to a group that can be used as an attribute when defining restrictions.

Adding (creating) accounts

To add an account, take these steps:

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

   The Manage Accounts page opens.

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

   The Field Values page opens.

3. Under the **Create** <agency name> section, complete the fields. (Depending on your agency, the fields may vary.)

4. Type a description in the Description text box.

5. Click **Create**.

   A message confirms the account was successfully added. The account is listed in the Field Values table.

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

   –OR–

   Edit the account to provide additional details.

Editing accounts

When you edit an account, you can update the description, enable or disable the account, specify the Valid From and Valid To date range, changes the display order, and add, assign or remove groups.

To edit an account, take these steps:

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

   The Manage Accounts page opens.

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

   The Field Values page opens.

3. Click **Edit** on the row that identifies the account you want to edit.

4. Make changes and click **Save**.

Deleting accounts

You may delete accounts so that they are no longer available to users. To delete accounts, take these steps:

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

   The Manage Accounts page opens.

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

   The Field Values page opens.

3. Click "X" on the row that identifies the account you want to remove.

   A message confirms the account was removed.

Overview of the Select Employees page

The Select Employees page lets you search for users, work with employee profiles, view current timesheet summaries, and manage delegates   Search filters help you quickly find people, employee profiles, and timesheet summaries associated with user IDs, names, 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.

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

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

- **User ID**. Type search criteria to search for employees by User ID.
- **Last Name**. Type search criteria to search for employees by last name.
- **First Name**. Type search criteria to search for employees by first name.
- **Organization**. Use this drop-down list to select employees assigned to a specific organization.
- **Timekeeper**. Type search criteria to search for employees assigned to a specific Timekeeper.
- **Supervisor**. Type search criteria to search for employees assigned to a specific Supervisor.
- **SSN**. Type an SSN to search for a specific user. You must type the complete SSN and it must be an exact match.
- **Active**. Use this drop-down list to display records with these employee statuses:
    - **All**. Displays employee records with Active and Inactive statuses.
    - **Inactive**. Displays employee records that are no longer active in the system.
    - **Active**. Displays employee records who are currently active in the system

Working with the Select Employees page

Searching for Employees

Using the Employees search function, you can search by:

- User ID. F or example, "0000001."
- Last name only. For example, "Allen."
- First name only. For example, "Jacob."

Employee search criteria are explained below.

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 <u>user ID</u>: Type the ID in the User ID search field, and then click **Search**.
- For <u>all Employees with the same last name</u>: 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 <u>all Employees with the same first name</u>: 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."
- <u>To use wildcards</u>, 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**, **Supervisor** or **SSN** 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 **Inactive** from the Active drop-down menu.

2. Click **Search**.

   The results display. For example, if you selected *Inactive* from the Active drop-down menu, inactive employees display.

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

Searching for employees assigned to Timekeepers and Supervisors

If you want to work with a Timekeeper's assigned employees, type the Timekeeper's last name in the Timekeeper search text box. For example, if you want to work with Timekeeper Jay White's employees, type "White" in the Timekeeper text box and click **Search**. All employees assigned to Jay White are listed. (Use the Supervisor search text box the same way to search for employees assigned to a specific Supervisor.)

To search for a Timekeeper or Supervisor's assigned employees, take these steps:

1. Type the Timekeeper's last name in the Timekeeper search text box and then click **Search**.

    The Timekeeper's employees are listed.

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

Using links on the Select Employees page

HR Administrators may click **user ID hyperlinks** on the Employees page to open the user's employee profile.

Overview of Select Actions menus

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

- **Timesheets**
- Current Timesheet Summary. View one or several Timesheet Summaries.
- **Profiles and Settings**
- Employee Profile. View or edit an employee profile.
- **Other Actions**
  - Manage Delegates. Assign delegates to other users with the same role. You may also remove delegate role assignments.

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

HR Administrators may view timesheet summaries for the current pay period. A sample Timesheet Summary is shown below (the graphic has been edited to fit on the page.)

Timesheet Summary

Unvalidated Validated Certified Sent

Employee: Davis, Bunny
Pay Period: 16 - 2015 : Aug 09, 2015-Aug 22, 2015 S [Select Pay Period]

Timesheet Type: Regular
Status: Unvalidated

Hourly Timesheet

Transaction COP Event	Account	Sun 8/09	Mon 8/10	Tue 8/11	Wed 8/12	Thu 8/13	Fri 8/14	Sat 8/15	Wk1	Sun 8/16	Mon 8/17	Tue 8/18	Wed 8/19	Thu 8/20	Fri 8/21	Sat 8/22	Wk2	Total
Time In / Time Out																		
Start Time																		
End Time																		
Work Time																		
01 - Regular Base Pay	020000002002 (BEA Support Staff)		8:00	8:00	8:00	8:00			32:00		8:00	8:00	8:00	8:00	8:00		40:00	72:00
	Work Time Total		8:00	8:00	8:00	8:00			32:00		8:00	8:00	8:00	8:00	8:00		40:00	72:00
Time In / Time Out																		
Absence Start																		
Absence End																		
Leave Time																		
66 - Administrative Leave	020000002002 (BEA Support Staff)						8:00		8:00									8:00
	Leave Time Total						8:00		8:00									8:00
	Daily Total		8:00	8:00	8:00	8:00	8:00		40:00		8:00	8:00	8:00	8:00	8:00		40:00	80:00
Dollar Transactions																		
	Daily Total																	

Work Schedule

Schedule Week 1

Su 08/09	M 08/10	T 08/11	W 08/12	Th 08/13	F 08/14	Sa 08/15
	9:00a-5:00p	9:00a-5:00p	9:00a-5:00p	9:00a-5:00p	9:00a-5:00p	
	8 hours	8 hours	8 hours	8 hours	8 hours	

Schedule Week 2

Su 08/16	M 08/17	T 08/18	W 08/19	Th 08/20	F 08/21	Sa 08/22
	9:00a-5:00p	9:00a-5:00p	9:00a-5:00p	9:00a-5:00p	9:00a-5:00p	
	8 hours	8 hours	8 hours	8 hours	8 hours	

Totals

Timesheet Totals

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

Transaction Totals

Transaction Code	Amount
01 - Regular Base Pay	72:00
66 - Admin/Excused Absence	8:00

Remarks

Pay Period Remarks

Pay Period Remarks

Timesheet Entry Remarks

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

Leave Requests

Date	Times	Hours	Transaction	Status	Approver
Fri 8/14	9:00am - 5:00pm	8:00	Administrative Leave	Approved	cfryman

Leave Transfer Donations

LTP Account	Leave Type	Amount	Status
Leave Transfer Program	Annual Leave	8:00	Submitted

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	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
Other Leave	0:00	0:00	0:00	8:00	0:00	0:00	0:00	8:00	8:00	0:00
COP Occurrence 1 08/10/2015	0	0	45	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:

Continuation of Pay

Date of Injury: 2015/08/10	COP Used to Date: 0
Injury Number: 0810	PP Forward Balance: 0
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
Validate	Pending Attestation	08/17/2015 04:48 PM EDT	Davis, Bunny	
Save	Timesheet Saved	08/17/2015 04:48 PM EDT	Davis, Bunny	

[Printable Version] [Cancel]

Opening and printing Timesheet Summaries

To open and print timesheet summaries, take these steps:

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

   The Select Employees page opens.

2. Click the check box next to the employee(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**.

Depending on whether the timesheet is a correction timesheet, additional options may be included at the bottom of the Timesheet Summary page.

- **Show Correction**. Use this option to view a correction timesheet that contains an amendment.
- **Create Correction**. Use this option to open a correction timesheet and make an amendment.
- **Original Timesheet**. Use this option to open the original timesheet that preceded the correction timesheet.

Schedules

HR Administrators may work with the webTA Advanced Scheduling module options under the Schedule Management section on the main menu. Default schedules, which are basic webTA schedules, are not available to HR Administrators.

Advanced schedules include features such as Regular Days Off, permanent and temporary schedules, additional pay period options, and a Supervisor approval process. HR Administrators manage shifts and schedule templates, while 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.

About Advanced Scheduling tools

The following tools Advanced Scheduling tools are available to HR Administrators:

- **Shift**. A shift is the smallest segment of a schedule.
- **Assign Shifts**. Assign shifts to all organizations or to specific organizations.

- **Schedule templates**. Schedule templates contain values that may be used to automatically populate employee schedules.
- **Assign Schedule Templates**. Assign schedule templates to all organizations or to specific organizations.
- **Employee Schedules List View**. The Schedules List View displays a high level summary of schedules assigned to employees. Timekeepers may click user name links to view or work with schedules for their assigned employees.

Each tool is described below in more detail.

About shifts

The HR Administrator adds and maintains a list of shifts that Timekeepers use to add schedules. An example flex band shift is shown below.

Add Shift page contents

- **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.

- **Name**. The shift name.
- **Description**. A brief description of the shift.
- **Active**. Whether the shift is currently available to users. If the shift is inactive, it is not listed as available when Timekeepers add schedules.
- **For All Organizations**. Enable the check box to make the shift available to all organizations. Clear the check box if you want to select specific organizations (use the Assign Shifts option to specify individual organizations.)
- **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.*
- **Hours**. If the shift type includes a band of hours, specify the Start Time and Stop Time for each band.
- **Start Time**. The time that the shift begins (HH:MM), for example, 8:00 a.m. *NOTE: If the shift is an RDO, enter the same start time and stop time, for example, 8 a.m. This bypasses the mandatory field validation check and results in zero hours.*
- **Stop Time**. The time that the shift ends (HH:MM), for example, 4:00 p.m. *NOTE: If the shift is an RDO, enter the same start time and stop time, for example, 8 a.m. This bypasses the mandatory field validation check and results in zero hours.*
- **Meal Time**. The duration of the meal in minutes, for example, 0:30 minutes.
- **Shift Length**. The total number of hours in the shift. The system calculates this value when you save the shift.
- **Transaction Code**. The transaction code associated with the shift hours.

Working with advanced schedule tools

Adding or modifying shifts

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

To add or modify a shift, take these steps:

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

   The Shifts page opens.

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

   The Add Shift page opens.

   –OR–

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

   The Shift Details page opens.

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

   - **Regular**. The shift begins and ends at specific times.
   - **Flex 1 Band**. The shift is a flexible schedule that does not have core hours.
   - **Flex 3 Band**. The shift consists of one band of core hours and two bands of flexible hours.
   - **Flex 5 Band**. The shift consists of two bands of core hours and three bands of flexible hours.

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

4. Type a name in the **Name** field.

5. Type a brief description in the **Description** field.

6. Accept or clear the check mark in the **Active** box. If the box is cleared, the shift cannot be assigned to a schedule.

7. Accept or clear the **Regular Day Off** check box. If the box is checked, the shift represents a regular day off (RDO).

8. If you selected **Regular** for the shift type, go to the next step.

   –OR–

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

9. Accept or clear the **For All Organizations** check box. If the box is checked, the shift is assigned to all organizations.

10. Type a **Start Time** and a **Stop Time** in hours and minutes.

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

11. Type a **Meal** in hours and minutes (duration).

    The system calculates the Shift Length based on the Start Time, Stop Time and Meal. The field is read-only.

12. Select a transaction code from the **Transaction Code** drop-down list.

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

Assigning shifts to organizations

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

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

   The Assign Shift page opens.

2. Click **Assign Organizations** on the row that identifies the shift.

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

3. Click **Add Organizations**.

   The Organization Management - Assign Organizations page opens.

4. Click **Select** on the row that identifies the organization you want to assign.

   –OR–

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

   You return to the Assigned Organizations to Shift page.

5. Assign another organization or click **Cancel** to go back to the previous page.

Unassigning shifts from organizations

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

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

   The Assign Shift page opens.

2. Click **Assign Organizations** on the row that identifies the shift.

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

3. Click the "**X**" under the Delete column on the row that identifies the organization.

   A pop up box opens.

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

   –OR–

   Click **Cancel** to cancel the deletion.

About Schedule Templates

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

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

HR Administrator Main Menu > Schedule Templates >

Schedule Template

Items marked with an asterisk* are required.

* **Name:** Regular 5 Day

Description:

* **Weeks:** 2 ▼

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

	Week Two						
☐	Day	Shift	RDO	Transaction Code	Hours	Add Row	Delete
☐	Sun					+	X
☐	Mon	9:00am-5:00pm		Regular Base Pay	8	+	X
☐	Tue	9:00am-5:00pm		Regular Base Pay	8	+	X
☐	Wed	9:00am-5:00pm		Regular Base Pay	8	+	X
☐	Thu	9:00am-5:00pm		Regular Base Pay	8	+	X
☐	Fri	9:00am-5:00pm		Regular Base Pay	8	+	X
☐	Sat					+	X
		Week Two TOTAL			40:00		

[Insert Shift] [Delete Shift]

[Save] [Cancel]

Adding schedule templates

To add a schedule template, take the following steps:

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

   The Schedule Templates page opens.

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

   The Schedule Template page opens.

3. Type a schedule template name in the **Name** field.

4. Optionally, type a brief description in the **Description** field.

5. Select the number of weeks from the **Weeks** drop-down menu.

6. Click check boxes next to the days of the week in which you want to insert a shift.

7. Click **Insert Shift**.

   The Insert Shift pop-up box opens.

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

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

9. Optionally, click the plus sign (**+**) under the Add Row column to insert another shift on a day that is populated with an existing shift. A second row appears.

10. Click the check box to the left of the row and then click **Insert Shift**. The Insert Shift pop up box opens. Click the row that identifies the shift and then click **OK**.

    You return to the Schedule Template page.

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

    –OR–

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

    The shift is removed.

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

    –OR–

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

Assigning schedule templates to organizations

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

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

   The Assign Schedule Template page opens.

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

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

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

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

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

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

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

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

   –OR–

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

About the Employee Schedules List View

The Employee Schedules List View page displays employees and their assigned schedules for the specified pay period. Click the employee name link to view the assigned schedule(s). An example Employees Schedules List View page is shown below.

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

Managing Organizations

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

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

- A navigation "breadcrumb" path appears. The first part of the path is named "Root." Click **Root** to return to the parent organization table anytime.

- The parent organization table is replaced by the sub-organizations table. As you drill down to additional sub-organizations, the breadcrumb path includes links to each previous level.

  NOTE: *The breadcrumb path names will correspond to the names of the organizations and sub-organizations at the agency.*

The Organization Management page is shown below with a list of sub-organizations.

If you click a sub-organization link, these changes take place:

- A second-level sub-organizations table appears. (The table is blank if second level sub-organizations have not been added.)
- The breadcrumb path expands.
- You may add new sub-organizations and manage members.

The following screenshot shows an example sub-organization.

Working with organizations

Viewing organizations and sub-organizations

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

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

   The Organization Management page opens.

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

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

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

   –OR–

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

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

   –OR–

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

Adding organizations

To add a sub-organization to a parent organization, take these steps:

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

   The Organization Management page opens.

2. Click the **parent organization name link**.

The Sub-Orgs table opens.

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

    The sub-organization is added to the table.

4. Continue adding organizations.

    –OR–

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

Adding and deleting organization members

To add members to an organization, take these steps:

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

    The Organization Management page opens.

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

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

3. Click **Manage Members**.

    The Manage Members Of ... page opens.

4. Click **Add User**.

    The Select User page opens.

5. Click **Select** next to each user name that you want to add.

    A message confirms that each user was added.

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

To remove members from an organization, take these steps:

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

    The Organization Management page opens.

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

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

3. Click **Manage Members**.

   The Manage Members Of ... page opens.

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

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

Exporting organizations

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

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

   The Organization Management page opens.

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

3. Click **Export All**.

   The File Download box opens. Click **Save**. The Save As dialog opens. Choose the location where you want to save the report, then click **Save**.

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

Leave Transfer Programs

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

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

- **Approved recipient**. For an approved recipient to use donated leave, an "event" must be established for that person. An event has a starting and ending date and a limit on the amount of donated leave the recipient may use.

- **Donations to the account**. Donations can be made from within the agency or outside of the agency. Donations may be made by employees or by the HR Administrator on behalf of employees.

- **Deductions from the account**. webTA tracks the balances of the donations and deductions as donations are used. Donations may be made to the recipient's timesheet after he or she has exhausted all of their annual and sick time.

- **Restored leave**. After an account is closed by the HR Administrator, webTA restores unused leave back to donors.

An example LTP Management page is shown below.

Working with LTP Accounts

An example voluntary leave program account is shown below.

Adding LTP accounts

To add an LTP account, take these steps:

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

   The LTP Management page opens.

2. Click **Add LTP Account**.

   The Add LTP Account page opens.

3. Type an account name in the **Name** field and an accompanying description in the **Description** field.

4. Select the account type from the **Type** drop-down list.

5. Click **Save**.

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

6. Click **Save**.

Closing LTP accounts

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

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

To close an LTP account, take these steps:

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

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

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

   A confirmation message appears.

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

   –OR–

   Click **Cancel** to dismiss the operation

Deleting LTP accounts

To delete an LTP account, take these steps:

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

   The LTP Management page opens.

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

   A message asks you confirm the deletion.

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

   –OR–

   Click **Cancel** to dismiss the operation.

Working with Recipients

Adding recipients

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

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

    The LTP Management page opens.

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

    The Edit LTP Account page opens.

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

    The Select Recipient page opens.

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

    The LTP Recipient page opens.

5. Enter the **Event** (for example, Self Health.)

6. Enter the recipient's **Position**, **Grade** and **Step**.

7. Enter the **LTP Leave Limit** in hh:mm format. This is the maximum amount of leave that the recipient may use.

8. Click the **Personal** or **Family** radio button to specify whether the emergency applies to the employee or to a family member.

9. Type the **Start Date** or click the **calendar icon** to specify when the recipient may begin using donated leave.

10. Type the **End Date** or click the **calendar icon** to specify when the recipient must stop using donated leave.

11. Click **Save** and then click **Cancel** to go back to the Edit LTP Account page.

Editing recipients

To edit LTP recipient information, take these steps:

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

    The LTP Management page opens.

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

    The Edit LTP Account page opens.

3. Click the **recipient name link** in the Recipient table.

    The LTP Recipient page opens.

4. Make changes.

5. Click **Save** and then click **Cancel** to go back to the Edit LTP Account page.

Deleting recipients

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

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

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. Under the Recipient table, click the "**X**" on the row that identifies the recipient.

   A confirmation message appears.

4. Click **OK** to delete the recipient.

   –OR–

   Click **Cancel** to dismiss the operation.

Working with donations

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

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

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

Adding donations

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

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

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

3. Click **Add Donation**.

   The Select Donor page opens.

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

   The Leave Balances page opens.

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

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

6. Enter the donor's **Position**, **Grade** and **Step**.

7. Enter the number of hours to donate in the Amount field.

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

9. Optionally, enter remarks.

10. Click **Save**.

    A message confirms that the donation was saved.

11. Click **Cancel** to go back to the LTP Account page.

    –OR–

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

Approving donations

Donations must be approved by the HR Administrator before the recipient can use the donation. To approve a donation, take these steps:

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

    The LTP Management page opens.

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

    The Edit LTP Account page opens.

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

    The Edit LTP Donation page opens.

4. Click **Approve**.

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

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

Deleting donations

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

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

    The LTP Management page opens.

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

    The Edit LTP Account page opens.

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

    A confirmation pop-up appears.

4. To proceed with the deletion, click **OK**.

    The donation is deleted

    –OR–

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

Rejecting donations

To reject a leave donation, take these steps:

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

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

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

   The Edit LTP Donations page opens.

4. Click **Reject**.

   A message confirms that the donation is rejected.

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

Reverting donations to pending

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

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

   The LTP Management page opens.

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

   The Edit LTP Account page opens.

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

   The Edit LTP Donations page opens.

4. Click **Revert to Pending**.

   A message confirms that the status is reverted.

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

Payroll and System Set Up

Managing Supplemental Builds

HR Administrators may create a FESI file that includes correction timesheets as well as all current timesheets for Census Agency employees. Two build options are available:

- **Run Build Through Pay Period**. Use this option to generate a FESI file that includes all certified or pre-processed timesheets, including correction timesheets.
- **Run Build Through Month**. Use this option for pay periods that cross month boundaries. Time from the first month is included in the transaction totals in the FESI data, but time from the second month is not. The FESI file includes the current pay period records; it does not include corrections.

The Supplemental Build Management page is shown below.

Once the file is complete, a new row displays in the Supplemental Build Management table. The row includes the build ID, the pay period, a date and time stamp, and the number of timesheets built. Click the **build ID link** to download the generated file. The file name format is **build_yymmdd_build_ID**.

To run a supplemental build, take these steps:

1. Click **Supplemental Build Management** from the Payroll section on the HR Administrator main menu.

    The Supplemental Build Management page opens.

2. Click **Run Build Through Pay Period**.

    –OR–

    Click **Run Build Through Month**.

    The Supplemental Build Progress page opens.

3. To monitor the progress, click **Refresh**. When the build is complete, the status changes to "Completed."

    –OR–

    To continue working while the build runs, click **Cancel** to go back to the main menu. You may return to the Supplemental Build Management page and click **Monitor Build** to check the progress of the build.

Reimbursement per Mile Management

HR Administrators use this function to set the rate of mileage reimbursement and the date range it is in effect. An example Reimbursement per Mile page is shown below.

To specify the rate, type the amount (in cents), specify the **Start Date** and **End Date**, and then click **Add**.

Import Job Management

HR Administrators may use the Import Job Management feature to add, configure, test, enable or disable, and schedule import jobs. Each import job must be configured with specific information. For details about data file structures, refer to the *NFC Core Data Load* spreadsheet located on the Kronos Federal Customer Portal. The spreadsheet includes the field, description, type, length and format for each import-export type.

Some imports are specific to DOC. For example, HR Administrators may run Census Branch Accounts for the current or previous year, Census Project Accounts for the current or previous year, and the DOC Webfred Import.

WEBFRED imports Census Bureau employee time in pay (TIP) and reimbursement data into webTA so that field employees receive pay through NFC payroll processing.

The following guidelines are important to be aware of:

- If the pay period entry in the WEBFRED file does not match the employee's current pay period in webTA, the system will not import the data.
- Employee records are locked after the import takes place. If the WEBFRED file is reloaded, employee data is not updated unless the following conditions are met:
  - Timekeepers and HR Administrators may use the Import EOM Data option. This option tells the system that all records in the WEBFRED file you are importing can be overwritten *in the future*, but only if the data has never been previously imported. This gives Timekeepers a way to overwrite timesheet data. If the check box is not initially enabled when you import the timesheet data, all future attempts to import data for that pay period will fail. The only way to overwrite the data is by contacting the HR Administrator, who may use the Force Import option to import the data.
  - HR Administrators may use the Force Import option. This option clears the employee's current TIP and reimbursement data and then overwrites it with the new import.

- If an error occurs during the import, the system clears the employee's record for the pay period so that it may be imported again after data issues are resolved in the WEBFRED file.

The Import Job page is shown below.

Import Job Management page contents

Name. The name of the import job.

Import Type. The type of import that will be run.

Payroll Provider. The NFC Payroll Provider.

Disabled. Whether the job is enabled or disabled.

Import EOM Data. This option tells the system that all records in the WEBFRED file you are importing can be overwritten *in the future*, but only if the data has never been previously imported. This gives

Timekeepers a way to overwrite timesheet data. If the check box is not initially enabled when you import the timesheet data, all future attempts to import data for that pay period will fail. The only way to overwrite the data is by contacting the HR Administrator, who may use the Force Import option to import the data.

Force Import. This option clears the employee's current TIP and reimbursement data and then overwrites it with the new import. This option is only available to HR Administrators.

Protocol. Determines how to read the import file.

- **Local file**. Reads the import file from the server's local file system.
- **FTP**. Reads the import file via File Transfer Protocol (FTP).
- **SFTP**. Reads the import file via Secure File Transfer Protocol (SFTP).

Directory. If the protocol "Local file" is selected, this is the directory of the webTA server. If the protocol "FTP" or "SFTP" is selected, this is the remote directory on those respective services.

Filename Pattern. Determines the filename pattern to match when looking for import files. For example, if you specified the filename pattern my_file_{CURRENT_DATE].txt then the resulting filename would, for example, be my_file_20150220.txt. Optionally, use the following variables to the filename as demonstrated in the example:

CURRENT_DATE. The current date in YYYYMMDD format.

CURRENT_TIME. The current time in HHMMSS format.

DIRECTORY. The directory specified.

REMOTE_HOST. The host name specified.

REMOTE_USER. The user specified.

REMOTE_PASS. The password specified.

PP. The current pay period number.

YYYY. The current pay period year.

Pre-Process File Command. Specify a system call to run on the file before it is processed. The output from the system call will be the data read by the import process.

Post Process Destination Directory. The directory into which the import file will be moved after it has been processed.

Hostname. If the protocol is FTP or SFTP, type the hostname.

User. If the protocol is FTP or SFTP, type the username for authentication.

Password. If the protocol is FTP or SFTP, type the password for authentication.

 # Retries. Number of retries to attempt when failures occur.

Retry Delay (secs). Number of seconds between retries.

Execute Multithread. Indicates whether the import job should be run multi-threaded.

User Data File. The data file is located on the local PC. (**NOTE**: Click **Run Import Now With User Data File** if you select this option.)

Edit Schedule. Set up a schedule that determines when the job will run.

The options at the bottom of the page include these buttons:

- **Run Import Now**. Upload the data file to the application server or make it accessible via an FTP/SFTP server, and then run the import.
- **Run Import Now With User Data File**. Upload the data file on the local PC directly to webTA, and then run the import.

About the Create Test Record option

Use the Create Test Record function to create import records via a form or to parse an existing line from an import file to view the individual fields. Every import job has a specific file format (for example, positions 1-9 are the SSN, positions 10-40 make up the employee's user ID, etc.) Click the **Record Class** drop-down list to see a list of available file formats.

About the Edit Deletion Job option

Use the Edit Deletion Job option to regularly delete data generated by the system upon the completion of each import job. Every time an import job runs, the job generates a line in the table at the top of the job details. The deletion job deletes those lines as well as any data associated with them. You may specify whether to enable or disable the delete job, the number of days of data to maintain prior to deletion, and when the deletion job will run.

Running the DOC Webfred Import job

This procedure explains how to run an existing DOC Webfred Import job. To run the WEBFRED import, take these steps:

1. Click **Import Job Management** from the System Set Up section main menu.

   The Import Job Management page opens.

2. Click the **job name link** (for example, Run WEBFRED Import.)

   The Import Job page opens.

3. Complete the fields.

4. Optionally, to import EOM (End of Month) data, enable the **Import EOM Data** check box. This option overwrites current data.

5. Optionally, HR Administrators may enable the **Force Import** check box to clear current TIP and reimbursement data and overwrite it with the new import.

6. Click **Save**.

   A message confirms that the job is running.

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

Adding or modifying import jobs

To add or modify import jobs, take these steps:

1. Click **Import Job Management** on the Administrator main menu.

   The Import Job Management page opens.

2. Click **Add New**.

   –OR–

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

   The Import Job page opens.

3. Complete the fields.

4. Click **Save**.

   A message confirms that the job and/or updates were saved.

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

Enabling or disabling import jobs

To enable or disable import jobs, take these steps:

1. Click **Import Job Management** on the Administrator main menu.

   The Import Job Management page opens.

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

   The Import Job page opens.

3. Click the check box next to Disabled to disable the job.

   –OR–

   Clear the check box next to Disabled to enable the job.

4. Click **Save**.

   A message confirms that the update was saved.

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

Scheduling import jobs to run

To schedule a job to run immediately, take these steps:

1. Click **Import Job Management** on the Administrator main menu.

   The Import Job Management page opens.

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

   The Import Job page opens.

3. Click **Run Import Now** near the bottom of the page.

   A message confirms that the job is scheduled for immediate execution.

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

To schedule a job to run at regular intervals, take these steps:

1. Click **Import Job Management** on the Administrator main menu.

   The Import Job Management page opens.

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

   The Import Job page opens.

3. Under Edit Schedule near the bottom of the page, select a day from the **Day of Week** drop down list. Select the hour from the Hour of Day drop down list.

4. Click **Save**.

   A message confirms that the update was saved.

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

Deleting import jobs

To delete an import job, take these steps:

1. Click **Import Job Management** on the Administrator main menu.

   The Import Job Management page opens.

2. Click **Delete** on the row that contains the job you want to delete. A message confirms that the import job was deleted.

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

Creating or parsing test records

To create or parse test records, take these steps:

1. Click **Import Job Management** on the Administrator main menu.

   The Import Job Management page opens.

2. Click **Create Test Record**.

   The Create Test Import Record page opens.

3. Select a file format from the **Record Class** drop down list and click **Select**.

   The page is populated with the fields contained in the file format.

4. Type values in the fields and then click **Create** to create the line of import data.

   –OR–

   Paste the line of import data into the Data Line field and click **Parse**. The page is populated with all of the fields in the file format and the fields are populated with the corresponding data from the line that you pasted.

Working with the Edit Deletion Job option

Use the Edit Deletion Job option to regularly delete data generated by the system upon the completion of each import job. Every time an import job runs, the job generates a line in the table at the top of the job details (for example, the data file that was used, the results of the load, etc.). The deletion job deletes those lines as well as any data associated with them.

You may specify whether to enable or disable the delete job, the number of days of data to maintain prior to deletion, and when the job will run.

To work with the Edit Deletion Job option, take these steps:

1. Click **Import Job Management** on the Administrator main menu.

   The Import Job Management page opens.

2. Click **Edit Deletion Job**.

   The Delete Imports Job Management page opens.

3. Complete the fields.

4. Click **Save**.

Export Job Management

The Export Job Management function includes options to add, configure, test, enable or disable, and schedule export jobs. For example, you might use the export function for data warehousing, or for exporting data into another database for use with third party reporting tools.

Each export job must be configured with specific information. For details about data file structures, refer to the *Core Import-Export webTA Formats* document located on the Kronos Federal Customer Portal. The document includes the field, description, type, length, format and explanatory comments for each import-export type. A sample Export Job page is shown below.

Export Job

Previous Exports

	Export Date	Status	Status Details	Status Date	Success	Skip	Fail	User	Delete

No results

Name:	
Export Type:	DOC Webfred Export ▼
Payroll Provider:	NFC Payroll Provider ▼
Disabled:	☑
Transfer File Compressed?:	Yes ▼
Protocol:	local file ▼
Directory:	
Filename Pattern:	
Hostname:	
User:	
Password:	
# Retries:	0
Retry Delay (secs):	30
Execute Multithreaded:	Yes ▼

Edit Schedule
Export Job Disabled

Day of Week	Hour of Day	Minute of Day
▼	▼	▼
▼	▼	▼
▼	▼	▼
▼	▼	▼

[Save] [Run Export Now] [Cancel]

Export Job page contents

The Export Job page contains these fields:

Name. The name of the export job.

Export Type. The type of export that will be run, for example, "Core Export Users."

Payroll Provider. If multiple payroll providers are defined in the system, select the one you want to use.

Disabled. Whether the job is enabled or disabled.

Protocol. Determines how to write the export file.

- **Local file**. Writes the export file from the server's local file system.

- **FTP**. Writes the export file via File Transfer Protocol (FTP).

- **SFTP**. Writes the export file via Secure File Transfer Protocol (SFTP).

Directory. The directory to which the export file will be written. It can be written to a local file system, or to an FTP site or SFTP site. The directory field identifies the location on those respective targets.

Filename Pattern. Determines the filename pattern to match when looking for export files. For example, if you specified the filename pattern my_export_[CURRENT_DATE].txt then the resulting filename would, for example, be my_export_20130220.txt. Optionally, use the following variables with the filename as demonstrated in the example:

CURRENT_DATE. The current date in YYYYMMDD format.

CURRENT_TIME. The current time in HHMMSS format.

DIRECTORY. The directory specified.

REMOTE_HOST. The host name specified.

REMOTE_USER. The user specified.

REMOTE_PASS. The password specified.

PP. The current pay period number.

YYYY. The current pay period year.

Hostname. If the protocol is FTP or SFTP, type the hostname.

User. If the protocol is FTP or SFTP, type the username for authentication.

Password. If the protocol is FTP or SFTP, type the password for authentication.

 # Retries. Number of retries to attempt when failures occur.

Retry Delay (secs). Number of seconds between retries.

Execute Multithread. Indicates whether the job should be run multi-threaded.

Edit Schedule. Set up a schedule that determines when the jobs will run.

About the Create Test Record option

Use the Create Test Record option to create export records via a form or to parse an existing line from an export file to view the individual fields. Every export job has a specific file format (for example, positions 1-9 are the SSN, positions 10-40 make up the employee's user ID, etc.) Click the **Record Class** drop-down list to see a list of available file formats.

About the Edit Deletion Job option

Use the Edit Deletion Job option to regularly delete data generated by the system upon the completion of each export job. Every time an export job runs, the job generates a line in the table at the top of the job details. The deletion job deletes those lines as well as any data associated with them.

You may specify whether to enable or disable the delete job, the number of days of data to maintain prior to deletion, and when the delete job will run.

Adding or modifying export jobs

To add or modify export jobs, take these steps:

1. Click **Export Job Management** on the Administrator main menu.

   The Export Job Management page opens.

2. Click **Add New**.

–OR–

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

The Export Job page opens.

3. Complete the fields.

4. Click **Save**.

A message confirms that the job and/or updates were saved.

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

Enabling or disabling export jobs

To enable or disable export jobs, take these steps:

1. Click **Export Job Management** on the Administrator main menu.

The Export Job Management page opens.

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

The Export Job page opens.

3. Click the check box next to Disabled to disable the job.

–OR–

Clear the check box next to Disabled to enable the job.

4. Click **Save**.

A message confirms that the update was saved.

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

Scheduling export jobs to run

To schedule an export job to run immediately, take these steps:

1. Click **Export Job Management** on the Administrator main menu.

The Export Job Management page opens.

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

The Export Job page opens.

3. Click **Run Export Now** near the bottom of the page.

A message confirms that the job is scheduled for immediate execution.

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

To schedule an export job to run at regular intervals, take these steps:

1. Click **Export Job Management** on the Administrator main menu.

The Export Job Management page opens.

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

The Export Job page opens.

3. Under Edit Schedule near the bottom of the page, select a day from the **Day of Week** drop-down list. Select the hour from the **Hour of Day** drop-down list.

4. Click **Save**.

A message confirms that the update was saved.

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

Deleting export jobs

To delete an export job, take these steps:

1. Click **Export Job Management** on the Administrator main menu.

The Export Job Management page opens.

2. Click **Delete** on the row that contains the job you want to delete. A message confirms that the export job was deleted.

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

Creating or parsing test records

To create or parse test records, take these steps:

1. Click **Export Job Management** on the Administrator main menu.

The Export Job Management page opens.

2. Click **Create Test Record**.

The Create Test Export Record page opens.

3. Select a file format from the **Record Class** drop-down list and click **Select**.

The page is populated with the fields contained in the file format.

4. Type values in the fields and then click **Create** to create the line of export data.

–OR–

Paste the line of export data into the Data Line field and click **Parse**. The page is populated with all of the fields in the file format and the fields are populated with the corresponding data from the line that you pasted.

Working with the Edit Deletion Job option

Use the Edit Deletion Job option to regularly delete data generated by the system upon the completion of each export job (for example, the data file that was used, the results of the load, etc.) To work with the Edit Deletion Job option, take these steps:

1. Click **Export Job Management** on the Administrator main menu.

The Export Job Management page opens.

2. Click **Edit Deletion Job**.

The Delete Exports Job Management page opens.

3. Complete the fields and click **Save**.

Reports

The following webTA reports are available to HR Administrators.

- Active Timesheets
- FESI Extract for Agency Report
- Final Timesheets
- Leave Audit
- New Employees
- Organization Assignment
- Role Assignment
- Supervisor Assignments
- Telework by Employee Report
- Telework Degree Of Participation
- Timekeeper Assignments
- Uncertified Timesheets

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.

Active Timesheets

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

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

Active Timesheets

Employee Name	Pay Period	Organization	State	Unit	Status	Timekeeper	Supervisor
Blake, John	2015-18	BEA	Alabama	11	Saved	White, Jay - jwhite	Fryman, Christy - cfryman
Davis, Bunny	2015-18	BEA	Alabama	11	Saved	White, Jay - jwhite	Fryman, Christy - cfryman
Perez, Sonia	2015-18	BEA	Alabama	11	Saved	White, Jay - jwhite	Fryman, Christy - cfryman
Richie, Betty	2015-18	BEA	Alabama	11	Saved	White, Jay - jwhite	Fryman, Christy - cfryman

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Report Parameters

Report Header: [   ]
Pay Period: [2015-18: Sep 06, 15 - Sep 19, 15 ▼]
Employee: [   ] [Search]
Timesheet Status: [All ▼]
Unit: [   ]
State: [▼]
Users: [Active ▼]

[Reset]

[Run Report] [Cancel]

To generate the Active Timesheets report, take these steps:

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

   The Reports page opens.

2. Click **Active Timesheets**.

   The page opens:

3. Use the following report parameters:

   - Click the **Pay Period** drop-down list to specify a pay period.

   - Click **Search** next to the **Employee** field. The Select User page opens. Click **Select** on the row that identifies the employee. You return to the Report Parameters page and the Employee field populates with the selected name.

   - Click the **Timesheet Status** drop-down list to specify a timesheet status:

     - **All**. Shows all employee timesheets.

     - **Saved**. Displays timesheets with the timesheet status Saved.

     - **Pending Attestation**. Displays timesheets that have been saved but not yet validated.

     - **Emp. Validated**. Displays records that have been validated and affirmed by employees.

     - **Tk. Validated**. Displays records that have been validated by Timekeepers.

     - **Both Validated**. Displays records that have been validated by employees and their Timekeeper.

     - **Valid. O/R**. Displays records that have had validation overridden.

     - **Approved**. Displays records that have been approved.

     - **Certified**. Displays records that have been both validated and certified but not yet built.

     - **Pre-processed**. Displays records that have been validated, certified, and built.

     - **Corrected**. Displays records that have been corrected.

   - Click the **Users** drop-down list to specify a user status:

     - **Active**. Employees are still eligible to use the system.

     - **Inactive**. Employees' records are still in the system, but they no longer have access it.

     - **Active & Inactive**. View both active and inactive employees.

4. Click **Run Report**.

   When you are done, click **Cancel**.

   –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.

FESI Extract for Agency Report

The Front End System Interface (FESI) Extract for Agency report displays built T&A records for a specified organization and range of dates.

To generate a FESI Extract for Agency report, take these steps:

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

   The Reports page opens.

2. Click **FESI Extract for Agency**.

   The page opens.

3. Use the following parameters:

   - Accept the organization.

     –OR–

     Click the **organization name link**. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Organization field is populated with the name.

   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Type the Start and End Date to specify the range of dates.

4. Click **Run Report**.

   A message displays: "Click one of the report links to export the report."

5. 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.

Final Timesheets

The Final Timesheets report lists, by pay period, employees who have separated from the organization. The Separation Date displays in the End Date column.

Final Timesheets

Pay Period	Employee	Organization	Timekeeper	Supervisor	End Date
2014-07	Rodriguez, Toni (trodriguez)	NFCEXAMPLE	White, Jay	Fryman, Christy	-

Page 1

Report Parameters

Report Header: [   ]

From PP: 2014-06: Mar 23, 14 - Apr 05, 14 ▼

To PP: 2014-07: Apr 06, 14 - Apr 19, 14 ▼

Users: Active ▼

[Reset]

To generate a Final Timesheets report, take these steps:

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

   The Reports page opens.

2. Click **Final Timesheets**.

   The page opens:

3. Use the following parameters:

   - Type optional text in the **Report Header** field. The text will appear in the report title.
   - Specify the starting pay period range from the **From PP** drop-down list and the ending pay period range from the **To PP** drop-down list.
   - Click the **Users** drop-down list to specify a user status:

- **Active**. Employees are still eligible to use webTA.
- **Inactive**. Employees' records are still in the system, but they no longer have access to webTA.
- **Active & Inactive**. View both active and inactive employees.

4. Click **Run Report**.

When you are done, click **Cancel**.

–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.

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.

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**.

    When you are done, click **Cancel**.

    –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.

New Employees

The New Employees report lists, by pay period, new users who have been added to the system. Depending on your role, new users are limited to your employee group. An employee is considered "new" until a timesheet is included in a build.

New Employees

Pay Period	Employee	Supervisor	Timekeeper	Organization	Start Date
2014-07	Johnson, Pete (pjohnson)	cfryman	jwhite	NFCEXAMPLE	01-Apr-2014

Page 1

Report Parameters

Report Header: [   ]

From PP: 2014-06: Mar 23, 14 - Apr 05, 14 ▼

To PP: 2014-07: Apr 06, 14 - Apr 19, 14 ▼

[Reset]

To generate a New Employees report, take these steps:

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

   The Reports page opens.

2. Click **New Employees**

   The page opens:

3. Use the following parameters:

   - Type optional text in the **Report Header** field. The text will appear in the report title.
   - 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.

4. Click **Run Report**.

   When you are done, click **Cancel**.

   –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.

Organization Assignment

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

To generate an Organization Assignment report, take these steps:

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

   The Reports page opens.

2. Click **Organization Assignment**.

   The page opens.

3. Use the following parameters:

   - Type optional text in the **Report Header** field. The text will appear in the report title.

   - Select a role.

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

   - Accept the organization.

     –OR–

     Click the **organization name link**. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Organization field is populated with the name.

   - Click the **Include Sub Orgs** check box to include sub-organizations.

   - 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**.

   When you are done, click **Cancel**.

   –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.

Role Assignment

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

To generate a Role Assignment report, take these steps:

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

   The Reports page opens.

2. Click **Role Assignment**

   The page opens:

3. Use the following parameters:

   - Type optional text in the **Report Header** field. The text will appear in the report title.
   - Click the **Role Name** drop-down list to specify a role.
   - Accept the organization.

     –OR–

     Click the **organization name link**. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Organization field is populated with the name.

   - Click the **Include Sub Orgs** check box to include sub-organizations.
   - Click the **Include Delegates** check box to include delegates for the role.
   - 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**.

When you are done, click **Cancel**.

–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.

Supervisor Assignments

The Supervisor Assignment report lists employees assigned to Supervisors.

Supervisor Assignments

Supervisor Id	Supervisor	Supervisor Org	Employee Id	Employee	Employee Org
cfryman	Fryman, Christy	BEA	jblake	Blake, John	BEA
cfryman	Fryman, Christy	BEA	bdavis	Davis, Bunny	BEA
cfryman	Fryman, Christy	BEA	ehall	Hall, Ethan	BEA
cfryman	Fryman, Christy	BEA	mjohnson	Johnson, Mark	BEA
cfryman	Fryman, Christy	BEA	dmaynard	Maynard, Doris	BEA
cfryman	Fryman, Christy	BEA	sperez	Perez, Sonia	BEA
cfryman	Fryman, Christy	BEA	brichie	Richie, Betty	BEA
cfryman	Fryman, Christy	BEA	jwhite	White, Jay	BEA

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Report Parameters

Report Header:

Supervisor: Fryman, Christy - cfryman   **Search**

Organization: BEA **Clear**

Include Sub Orgs: ☑

Users [Active ▼]

Reset

Run Report   **Cancel**

To generate a Supervisor Assignments report, take these steps:

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

   The Reports page opens.

2. Click **Supervisor Assignments** on the Reports page.

   The page opens.

3. Optionally, use the following parameters:

- Type optional text in the **Report Header** field. The text will appear in the report title.
- Click **Search** next to the Supervisor field. The Select User page opens. Click **Select** on the row that identifies the user. You return to the Report Parameters and the field populates with your selection.
- Accept the organization.

  −OR−

  Click the **organization name link**. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Organization field populates with the name.

- Click the **Include Sub Orgs** check box to include sub-organizations.
- 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**. Allows you to view both active and inactive employees.

4. Click **Run Report**.

When you are done, click **Cancel**.

–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.

Telework by Employee Report

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

To generate a Telework 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 the **organization name link**. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Organization field populates with the name.

    - 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.

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**.

When you are done, click **Cancel**.

–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.

Timekeeper Assignments

The Timekeeper Assignments report lists employees assigned to Timekeepers.

To generate a Timekeeper Assignments report, take these steps:

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

   The Reports page opens.

2. Click **Timekeeper Assignments** on the Reports page.

   The Timekeeper Assignments page opens.

3. Use the following parameters:

   • Click **Search** next to the **Timekeeper** field. The Select User page opens. Click **Select** on the row that identifies the Timekeeper. You return to the Report Parameters page and the Timekeeper field populates with your selection.

   • Accept the organization.

     –OR–

Click the **organization name link**. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Organization field is populated with the name.

- Click the **Include Sub Orgs** check box to include sub-organizations.
- 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**. Allows you to view both active and inactive employees.

4. Click **Run Report**.

When you are done, click **Cancel**.

–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.

Uncertified Timesheets

The Uncertified Timesheets report lists timesheets that have not been certified, by pay period.

To generate an Uncertified Timesheets report, take these steps:

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

   The Reports page opens.

2. Click **Uncertified Timesheets**.

   The page opens:

3. Use the following parameters:

- Type optional text in the **Report Header** field. The text will appear in the report title.

- 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.

- Accept the organization.

    –OR–

    Click the **organization name link**. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Organization field is populated with the name

- 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**.

    When you are done, click **Cancel**.

    –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.

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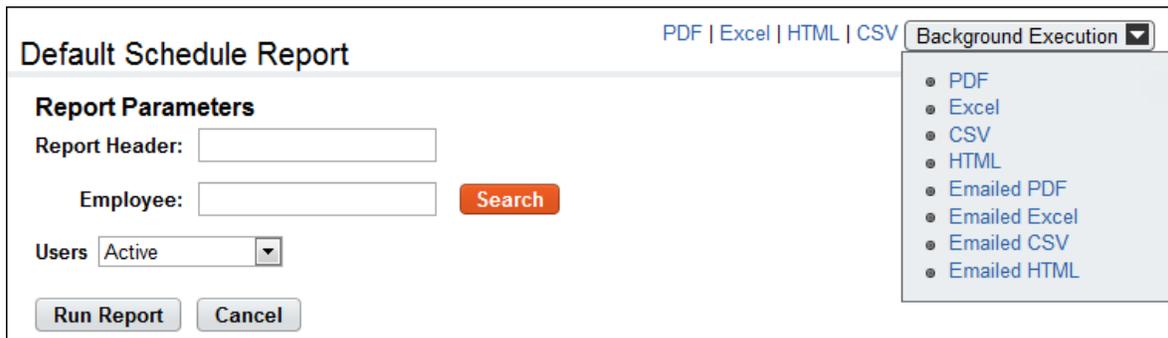
To save a report in a PDF, Excel, HTML or CSV file, take these steps:

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 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 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.