



WEB·TA V4

KRONOS

-MASTER SUPERVISOR

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Introduction

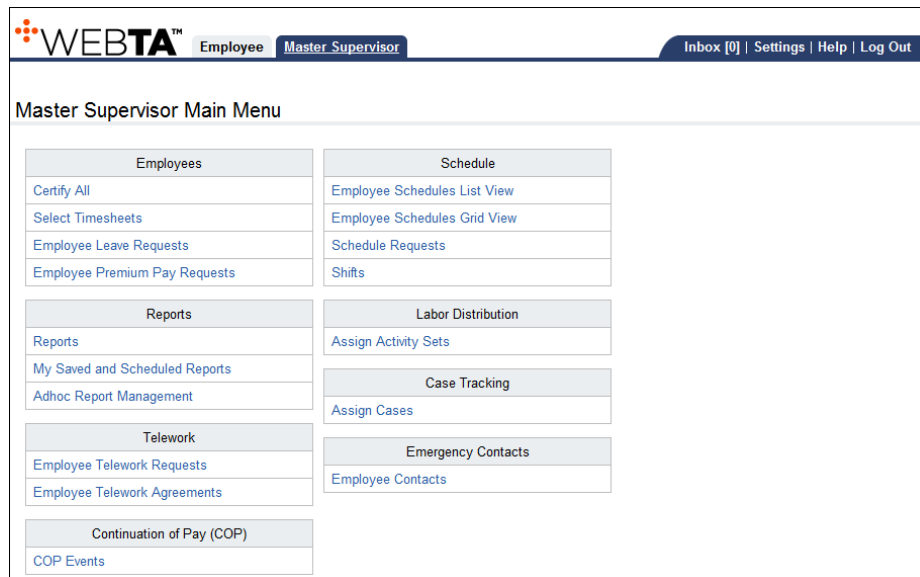
This guide explains how to perform functions that are available to webTA users who are assigned the Master Supervisor role. The Master Supervisor role is similar to the Supervisor role with these important differences:

- Master Supervisors may work with all employees in the agency (Supervisors are limited to working with their assigned employees.)
- The Master Supervisor role cannot be delegated. Since Master Supervisors have neither assigned employees nor delegates, options to filter data by My Employees or My Delegated Employees do not produce results, or are not available.

Additional Master Supervisor functions include certifying employee timesheets, responding to leave, premium pay and schedule requests, modifying timesheet profiles, and other tasks.

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

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



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

Timekeeping Cycle

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

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

Overview of the Select Timesheets page

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

Select Timesheets

Pay Period: 07 - 2015 : Apr 05, 2015-Apr 18, 2015
 Timesheet Status: Saved
 User ID:
 Last Name:
 First Name:

Organization: Agency
 Timekeeper:
 Supervisor:
 Delegates For: NONE
 Timesheet Type: All

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

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Select Action

Timesheets

- Timesheet
- Timesheet Summary
- Certify Selected
- Processed Timesheets

Profiles and Settings

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

Leave and Premium Pay

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

Send Messages

- Send Message

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

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

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

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

- **Saved + Emp Validated.** Displays records that have been saved, as well as records that have been validated by employees.
- **Saved + All Validated.** Displays records that have been saved, as well as all records that have been validated.
- **User ID.** Type search criteria to search for employees by User ID.
- **Last Name.** Type search criteria to search for employees by last name.
- **First Name.** Type search criteria to search for employees by first name.
- **Organization.** Use this drop-down list to select employees assigned to a specific organization.
- **Timekeeper.** Type search criteria to search for employees assigned to a specific Timekeeper.
- **Supervisor.** Type search criteria to search for employees assigned to a specific Supervisor.
- **Delegates For.** Use this drop-down list to display employee records with the following delegate criteria.
 - **NONE.** Shows only your employees:
 - **<Delegate Name.>** Shows only the employees of the selected delegate.
- **Timesheet Type.** Use this drop-down list to display timesheets with these statuses:
 - **All.** Displays both correction and regular timesheets.
 - **Correction.** Displays correction timesheets.
 - **Regular.** Displays regular timesheets.
 - **Invalid Timesheet Profile.** Displays employees with incomplete timesheet profiles.

Searching for Timesheets

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

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

Search field criteria are listed below.

Using search criteria in free-text fields

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

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

To enter text, numbers, or wild cards:

- By user ID. Type the user ID in the User ID search field, and then click **Search**.
- For all Employees with the same last name. Type the name in the Last Name field and then click **Search**. For example, type “White” and click **Search**. The system adds an implied asterisk wildcard at the end and matches employees with a last name of “White” , “Whitehouse” , “Whitey” , etc.

- For all Employees with the same first name. Type the name in the First Name field and then click **Search**. For example, type “Jay” and click **Search**. The system finds employees with the first name “Jay.”
- To use wildcards, type an asterisk to match text or numbers, or type a question mark to match a single character.

To search for employees:

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

Using drop-down lists to filter information

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

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

Using links on the Select Timesheets page

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

Here is a brief description of each link

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

Overview of the Select Action menus

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

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

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

- **Certify Selected.** Certify one or several timesheets.
- **Validate Selected.** Validate one or several timesheets.
- **Create Correction.** Correct a processed timesheet.
- **Processed Timesheets.** View timesheets that have been certified and processed.
- **Profiles**
 - **Timesheet Profile.** View and edit one or several timesheet profiles.
 - **Work Schedules.** View and edit one or several work schedules.
 - **Default Timesheet Profile.** View and edit one or several default timesheet profiles.
 - **Employee Profile.** View and edit an employee profile.
- **Leave and Premium Pay**
 - **Leave Balances.** View leave balances for an employee, including details that show the amount accrued by pay period.
 - **Leave Calendar.** View leave requests in a monthly calendar format.
 - **Leave Requests.** View current or archived requests. Depending on your role, you may be able to add, submit, delete, cancel, approve or deny leave requests.
 - **Premium Pay Requests.** View current or archived requests. Depending on your role, you may be able to add, submit, delete, cancel, approve or deny premium pay requests.
- **Messages**
 - **Send Message.** Send a message to one or more employees in your group.
- **Default Schedule**
 - **Default Schedule.** View and edit one or several default schedules.

Timesheet Profiles and Timesheet Summaries

About timesheet profiles

The information on the Timesheet Profile page identifies an Employee's basic payroll profile. Timekeepers may add and update timesheet profiles for their assigned Employees. Supervisors may update the Pay Details section of the timesheet profile.

An example timesheet profile is shown below.

Timesheet Profile » Rodriguez, Toni

Settings

Licenses

Calendars

Locator Info

Agency Settings

•••••

Roles

Timesheet Details

Timesheet Profile »

Items marked with an asterisk* are required.

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

Status Change

Status Change Type: None

Status Change Day: None

Status

Oath of Office: false

Final Report: false

On Hold: false

Pay Details

* Payplan:

* Tour of duty:

* Duty Hours:

* Work Week:

* Alternative Work Schedule:

Overtime/Standby

RSO / Salary Cap: None

Standby Hours Week 1:

Standby Hours Week 2:

Standby AUO Percent:

Leave

Service Computation Date: Apr 06, 2014

Leave Category Override: Default (Based on SCD) (4 hours per pay period)

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

Home Leave Computation Date:

Home Leave Category: None

Home Leave End Date:

VLTP Recipient: No

ELTP Recipient: No

FMLA Invoked: false

FMLA Expiration Date:

FMLA Military Invoked: false

FMLA Military Expiration Date:

Military Regular Leave Flag: false

Military Emergency Leave Flag: false

Accounting

Accounting Type: Manual Account Entry

Pay Provider - NFC

Agency: NFCEXAMPLE

State Code: Maryland

Town: 1111

Unit: 11

Timekeeper: 11

New Contact Point: false

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

Pay Period

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

Status Change

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

Status

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

Pay Plan

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

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

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

Overtime/Standby

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

Leave

- **Service Computation Date** - Used to calculate the leave accrual category.
- **Leave Category Override** - Establishes the accrual category override that is not dependent on the SCD.
- **Leave Ceiling Override** - Specifies the leave ceiling that overrides the default leave ceiling for the Employee.

- **Home Leave Computation Date** - Indicates the start date for an Employee to participate in the home leave accrual program.
- **Federal Home Leave Category** - Establishes the amount of home leave an Employee will accrue per pay period.
- **Home Leave End Date** - Indicates the end date for participation in the home leave accrual program.
- **VLTP Recipient** - Indicates the employee is a recipient of hours from the voluntary leave transfer program (VLTP).
- **ELTP Recipient** - Indicates the employee is a recipient of hours from the emergency leave transfer program (VLTP).
- **FMLA Invoked, FMLA Expiration Date**- A check mark in the FMLA Invoked check box indicates that the employee's leave request for FMLA has been invoked and approved. A date in the FMLA Expiration Date field identifies the date that the employee's FMLA expires; this date is 12 months from the Start Date in the leave request. The check box and the date may be system-generated, or manually entered by a user. Two scenarios are described below.
 - webTA enables FMLA Invoked and populates the FMLA Expiration Date. This scenario takes place when an employee invokes and submits an FMLA leave request, and the employee's Supervisor approves the request. Upon Supervisor approval, webTA enables the FMLA Invoked check box in the employee's Timesheet Profile and populates the FMLA Expiration Date. The FMLA Expiration Date is 12 months from the Start Date in the leave request.
 - If the Supervisor denies the FMLA request, there are no changes in the Timesheet Profile.
 - If the Supervisor reverts an approved request to Pending, the system clears both the FMLA Invoked check box and the FMLA Expiration Date field.
 - Users manually enable the check mark and type the FMLA Expiration Date. Users who have system permission to edit the Timesheet Profile (Timekeepers, Master Timekeepers, HR Administrators, and Administrators) may manually enable the FMLA Invoked check box and type the FMLA Expiration Date, or clear the check box and FMLA Expiration Date. This may be useful if the leave request is adjusted and a manual update is required.
- **FMLA Military Invoked, FMLA Military Expiration Date.** (Please see the explanation above for FMLA Invoked, FMLA Expiration Date.)
- **Military Regular Leave Flag** - Indicates that the employee is entitled to military regular leave and generates the automatic accrual.
- **Military Emergency Leave Flag** - Indicates that the employee is entitled to military emergency leave and generates the automatic accrual.

Accounting

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

Pay Provider - NFC

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

Editing timesheet profiles

Master Supervisors may update the Pay Details section of the timesheet profile. To update a timesheet profile, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the **User ID link** of the employee whose timesheet profile you want to work with.
- OR -
Click the check box on the row that identifies the employee(s) and then select **Timesheet Profile** from the Profiles and Settings action menu.
3. Update the information.
4. Click **Save** and then click **Cancel**.

Splitting timesheet profiles

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the **User ID link** of the employee whose timesheet profile you want to work with.
- OR -
Click the check box on the row that identifies the employee(s) and then select **Timesheet Profile** from the Profiles and Settings action menu.
3. Click **Split Profile** near the bottom of the page.
Two versions of the profile are displayed side-by-side. The original profile appears on the left. The new version appears on the right.
4. From the **Starting Date of New Status** drop-down list, select the date that the new status will begin.
5. Make additional changes to the new version of the profile.
6. Click **Save**.
7. Optionally, click **UnSplit**.

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

About default timesheet profiles

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

About the Timesheet Summary

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

- Validation messages
- Timesheet entries and totals
- Dollar transactions (if applicable)
- Work schedule
- Remarks
- Leave requests and status
- Premium pay requests and status
- Leave data
- Continuation of pay data (if license is enabled)
- Timesheet profile data
- Labor distribution data (if license is enabled)
- Case tracking (if license is enabled)
- Activity log of actions taken by other roles

Opening and printing Timesheet Summaries

To open and print timesheet summaries, take these steps:

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the **check box** on the row that identifies the employee(s), and then select **Timesheet Summary** from the Timesheets action menu.
The Timesheet Summary page opens.
3. Click **Printable Version** at the bottom of the page.
A window opens with the printable version of the timesheet summary.
4. Click **Print** and then click **Cancel** to go back to the previous page.

About Processed Timesheets

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

Pay Period	Dates
07 - 2013	Apr 07 - Apr 20
08 - 2013	Apr 21 - May 04
19 - 2013	Sep 22 - Oct 05
22 - 2013	Nov 03 - Nov 16

1-4 of 4 Records View 25 | 50 | 100

Cancel

Viewing processed timesheets

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the **check box** on the row that identifies the employee(s), and then select **Processed Timesheets** from the Timesheets action menu.
The Processed Timesheets page opens.
3. Optionally, click the Year drop-down list to specify the year, and then click **Select Year**.
4. Click the **Pay Period link** on the row that identifies the processed timesheet you want to view.
The Timesheet Summary page opens.
5. Click **Cancel** to return to the previous page.

Sending Messages

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

1. Click **Select Timesheets** on the main menu.
The Select Timesheets page opens.
2. Click the **check box(es)** next to the employee name(s).
3. Select **Send Message** from the Send Messages menu.
The Send Message page opens and the names you selected are listed in the Recipients field.
4. Type a message subject, click the cursor in the Body field, and type the message.
5. Optionally, click the **High Importance link** to enable or disable the High Importance icon. (The icon darkens when enabled and dims when disabled.)
6. Click **Send Message**.

A confirmation appears.

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

Certifying Employee Timesheets

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

Certifying and decertifying timesheets

To certify or decertify employee timesheets, take these steps:

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

Certifying all timesheets

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

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

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

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

To certify all timesheets, take these steps:

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

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

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

- OR -

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

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

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

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

Viewing an employee's Timesheet Summary

You can view an employee's Timesheet Summary for any timesheet that has been saved. The Timesheet Summary can only be viewed for pay periods that contain saved timesheet data; otherwise, the system displays a message that states "There is no Timesheet Summary data" for the employee.

To view an employee's Timesheet Summary, take these steps:

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

The Select Timesheets page opens.

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

The Timesheet Summary page opens. At the bottom of the page, a history log lists actions that have been performed on the timesheet.

3. Click the arrow near the top of the page to continue to the next timesheet summary.

-OR-

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

Employee Leave Requests

Master Supervisors may view leave balances and leave calendars, and monitor employee leave requests. When an employee submits a leave request, the request is usually automatically routed to the employee's Supervisor for approval. Depending on whether your Agency implements the Intermediate Approver feature, leave requests may be routed to one or more intermediate approvers instead of or in addition to the Supervisor. Master Supervisors may be designated as Intermediary Approvers.

About leave request workflows

A typical leave request process may have the following workflow:

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

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

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

About the Leave Request Calendar View

The Leave Request Calendar View displays leave request information in the format of a monthly calendar.

NOTE: *The Leave Calendar function supports viewing requests for multiple employees.*

A partial sample Leave Request Calendar View is shown below:

Leave Request Calendar View						
View: <input type="text" value="My Employees"/>			A = Approved D = Denied P = Pending			
◀ January 2013 ▶						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30 December Pay Period 27	31	1 January New Year's Day	2	3	4	5
6	7 Smith, Tina 8:00 (A)	8 Allen, Jacob 2:00 (P) Clark, Alex 8:00 (A)	9	10	11	12

Tips on using the request calendar

Here are tips on using the leave or premium pay request calendar:

- Click the **Previous** and **Next** arrows located near the top of the calendar to see previous and future months.
- Each request is preceded by one of the following request status codes: **A** (Approved), **D** (Denied), or **P** (Pending).
- To view details about a specific request, click the **Request link** on the request you want to view. The Leave or Premium Pay Request Form page opens.
- Depending on your role, use the **View** drop-down list near the top of the calendar to filter requests. Master Supervisors do not have delegates nor assigned employees, use the **A**

Viewing employee leave calendars

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

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

Monitoring leave requests

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

Status	User	Start Date	End Date	Leave Type	Hours	Submission Date	Supervisor	Timekeeper
Pending	Allen, Jacob	01/08/2013	01/08/2013	62 - Sick Leave	2:00	01/08/2013 10:07 AM	Fryman, Christy	White, Jay
Approved	Clark, Alex	01/22/2013	01/22/2013	61 - Annual Leave	8:00	01/15/2013 12:49 PM	Fryman, Christy	White, Jay

1-2 of 2 Records View

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

The leave request form is based on the OPM-71 (formally SF-71) Request for Leave or Approved Absence form. The request form includes these features:

- The leave balance for the selected leave type is displayed in the Transaction Leave Balance field, directly under the Leave Type drop-down list.
- A status bar in the upper right corner of the page identifies whether the request is pending, approved or denied.
- The middle portion of the leave request displays information related to Sick Leave Purpose, Family and Medical Leave Action, and Certification of the Leave Purpose.
- An activity log near the bottom of the request shows a list of actions taken, the date of the action, and the name of the person who initiated the action.

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

Leave Request Form

Pending Approved Denied

Leave Type and Dates

Employee: Allen, Jacob

Leave Balance Calculator

Leave Type: 61 - Annual Leave

Transaction Leave Balance: Annual Leave 106:00

Leave Request Times

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

Remarks

Submitter:

Remarks:

Approver:

Comments:

Intermediate Approvers

Overall Status: Approved

Name	Status
Stock, Donna	Approved

Sick Leave Purpose

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

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

Family and Medical Leave Act

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

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

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

Certification

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

Privacy Act

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

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

Activity Log

Action	Resulting State	Date	Name
Intermediate Approve	Pending	11/24/2014 03:40 PM	Stock, Donna
Submit	Pending	11/24/2014 11:14 AM	Allen, Jacob

Cancel

Viewing employee leave requests

To view employee leave requests, take these steps:

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

- OR -

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

The Leave Requests - Current page opens..

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

The Leave Request page opens.

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

Approving and denying intermediate approver leave requests

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

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

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

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

The Leave Requests - Current page opens.

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

The Leave Request Form page opens.

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

-OR-

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

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

Employee Premium Pay Requests

Master Supervisors may monitor and track employee premium pay requests. When an employee submits a premium pay request, the request is usually automatically routed to the employee's Supervisor for approval. Depending on whether your Agency implements the Intermediate Approver feature, premium pay requests may be routed to one or more intermediate approvers instead of or in addition to the Supervisor. Master Supervisors may be designated as Intermediary Approvers.

About premium pay request workflows

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

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

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

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

Monitoring premium pay requests

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

Status	User	Start Date	End Date	Transaction	Total Hours	Submit Date	Supervisor
Pending	Davis, Ben	01/14/2013	01/14/2013	19 - Overtime Over 8	4:00	01/15/2013 12:52 PM	Fryman, Christy - cfryman
Pending	Evans, Edna	01/14/2013	01/14/2013	19 - Overtime Over 8	6:00	01/15/2013 12:51 PM	Fryman, Christy - cfryman

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

The request form includes these features:

- A status bar in the upper right corner of the page identifies whether the request is pending, approved or denied.
- The middle portion of the form shows details about the requested date and time.
- An activity log near the bottom of the request shows a list of actions taken, the date of the action, and the name of the person who initiated the action.

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

Premium Pay Request

Pending Approved Denied

Transaction and Dates

Employee: Rodriguez, Toni

Transaction:

Premium Pay Request Times

* Start Date	* End Date	Start Time	Stop Time	Daily Hours	Total Hours	Action
<input type="text" value="Nov 17, 2014"/>	<input type="text" value="Nov 17, 2014"/>	<input type="text" value="6:00pm"/>	<input type="text" value="9:00pm"/>	3:00	3:00	

Remarks

Submitter:

Approver Comments:

Intermediate Approvers

Overall Status: Pending

Name	Status
Miller, Samantha (Default)	Pending

Activity Log

Action	Resulting State	Date	Name	Comments
Submit	Pending	11/19/2014 04:11 PM	Rodriguez, Toni	

[Cancel](#)

Viewing employee premium pay requests

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

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

- OR -

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

The Premium Pay Requests - Current page opens.

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

The Premium Pay Request page opens.

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

Approving and denying intermediate approver premium pay requests

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

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

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

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

The Premium Pay Requests - Current page opens.

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

The Premium Pay Request Form page opens.

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

-OR-

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

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

Employee Schedules

Depending on your agency's implementation of webTA, two types of schedules may be available: default schedules or advanced schedules. Typically, Supervisors do not have access to default schedules but do perform tasks related to advanced schedules.

If the Advanced Scheduling module is implemented at your agency, Timekeepers may create and submit schedules for their assigned employees, and Supervisors may approve or deny schedule requests. The workflow is similar to the timesheet validation workflow. The system generates and sends notification messages about pending schedule requests to Supervisors. When a Supervisor approves or denies a schedule request, the system sends a confirmation notification to the employee and their Timekeeper.

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

The system applies the permanent schedule to every pay period unless a temporary schedule has been approved for the employee. When an approved temporary schedule ends, the system automatically reverts to the employee's permanent schedule. Until the schedule has been approved by the employee's Supervisor, the schedule cannot be applied to the employee's timesheet.

The Advanced Scheduling module includes the following tools:

- **Shift.** A shift is the smallest segment of a schedule. Timekeepers and Supervisors may view shifts. The HR Administrator adds, updates and deletes shifts.
- **Employee Schedules List View.** The Employee Schedules List View is a high level summary of schedules assigned to employees. Supervisors may click user name links to view, approve or deny schedules for their assigned Employees.
- **Employee Schedules Grid View.** The Employee Schedules Grid View shows employees and the daily shifts assigned to each employee for the specified pay period. Supervisors may click user name links to view, approve or deny schedules for their assigned Employees.

Each tool is described below in more detail.

About shifts

A shift is the smallest segment of time that Timekeepers use to create schedules. View available shifts on the Shifts page, shown below.

Shifts

Name: Description: Start Time: Stop Time:

Transaction Code:

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

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The page includes these columns

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

Viewing shifts

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

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

About the Employee Schedules List View

The Employee Schedules List View page displays employees and their assigned schedules for the specified pay period.

Opening the Employee Schedules List View

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

1. Click **Employee Schedules List View** from the Schedule section on the main menu.
The Employee Schedules List View page opens.
2. Click the **employee name link** of the employee.
The Schedule Assignment page opens.
3. Depending on your role, click the **schedule name link** to view or respond to the assigned schedule.
-OR-
Depending on your role, add a permanent or temporary schedule.
4. Click **Cancel** to return to the previous page

About the Employee Schedules Grid View

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

Opening the Employee Schedules Grid View

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

1. Click Employee Schedules Grid View from the Schedule section on the main menu.
The Employee Schedules Grid View page opens.
2. Click the **employee name link** of the employee.
The Schedule Assignment page opens.
3. Depending on your role, click the **schedule name link** to view or respond to the assigned schedule.
-OR-
Depending on your role, add a permanent or temporary schedule.
4. Click **Cancel** to return to the previous page

About permanent and temporary schedules

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

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

An example schedule is shown below.

(Modify) Schedule - Evans, Edna submitted approved denied

* Name: Insert Schedule Template

Description:

* Weeks:

* Start Date:

End Date:

Schedule Type: Permanent
Schedule Status: Submitted

Week One						
<input type="checkbox"/>	Day	Shift	RDO	Transaction Code	Hours	Add Row Delete
<input type="checkbox"/>	Sun					+ X
<input type="checkbox"/>	Mon	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Tue	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Wed	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Thu	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Fri	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Sat					+ X
Week One TOTAL					40:00	

Week Two						
<input type="checkbox"/>	Day	Shift	RDO	Transaction Code	Hours	Add Row Delete
<input type="checkbox"/>	Sun					+ X
<input type="checkbox"/>	Mon	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Tue	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Wed	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Thu	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Fri	8:30am-5:00pm		Regular Base Pay	8	+ X
<input type="checkbox"/>	Sat					+ X
Week Two TOTAL					40:00	

Insert Shift Delete Shift

Approver:

Comments:

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

Delete Submit Approve Deny Cancel

Viewing employee schedules

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

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

The Schedule page opens.

4. View the schedule.
5. Click **Cancel** to return to the previous page.

About schedule requests

The Schedule Requests - Current page displays pending schedule requests as well as any request that has been submitted for the current pay period or a future pay period.

The Schedule Requests - History page displays requests from previous pay periods. Click **History** or **Current** near the bottom of the page to toggle between the two views.

Status	Employee Name	Schedule Start	Type	Total Hours	Submission Date	Submitted By
Pending	Allen, Jacob	01/13/2013	Permanent	80:00	01/16/2013 01:51 PM	White, Jay
Pending	Evans, Edna	01/13/2013	Permanent	80:00	01/16/2013 01:50 PM	White, Jay

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View

The Schedule Requests page includes these columns:

- **Status.** The status of the schedule, for example, Approved. Depending on your role, click the Status link to open the schedule.
- **Employee Name.** The name of the employee to whom the schedule is assigned.
- **Schedule Start.** The date that the schedule became active.
- **Type.** Whether the schedule is permanent or temporary.
- **Total Hours.** The total number of hours in the schedule, for example, 80:00.
- **Submission Date.** The date and time on which the schedule was submitted for approval.
- **Submitted By.** The name of the person who submitted the schedule for approval.

Approving or denying employee schedules

Supervisors may approve or deny employee schedules submitted by Timekeepers.

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

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

1. Click **Schedule Requests** from the Schedule section on the main menu.
The Schedule Requests page opens.
2. Click the **Status link** to open the employee's schedule.
The Schedule page opens.
3. Optionally, type a comment in the Approver Comments box.
4. Click **Approve** or **Deny**.

The action, date, time and name of the current user is recorded in the Activity Log near the bottom of the page.

Reverting employee schedules

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

1. Click **Schedule Requests** from the Schedule section on the main menu.

The Schedule Requests page opens.

2. Click the **Status link** to open the employee's schedule.

The Schedule page opens.

3. Click **Revert to Submitted**.

The request changes back to submitted status. The Revert to Submitted button is replaced by the Approve and Deny buttons. The action, date, time and name of the current user is recorded in the Activity Log near the bottom of the page.

webTA Add-on Modules

webTA Labor Distribution

Agencies may implement the Labor Distribution module to track time and attendance data against labor distribution activity categories, activity sets and activities.

An activity category represents a high level work function that is associated with other categories in a hierarchical order. For example, the first activity category may be "Initiative," the second category may be "Program," the third category may be "Project" and the fourth category may be "Task."

An activity is a specific instance of an activity category. For example, the activity category "Initiative" may include activities such as Customer Satisfaction Initiative, Internal Employee Initiative, and Building Performance Energy Reduction Initiative.

Activity sets are combinations of activities that represent a work flow or other useful repeatable pattern. The combination is hierarchically structured by activity category. Agencies may use activity sets to track time charged to different combinations of activities.

Supervisors and Master Supervisors must assign activity sets to employees before employees can add and track activities on timesheets.

Activity Sets

Initiative: Program: Project:

Task:

Initiative	Program	Project	Task	Assign
Sustainability	LEED Platinum	HVAC	HVAC Committee	Assign Set
Customer Satisfaction	Customer Satisfaction Survey	Develop customer satisfaction survey	Test customer satisfaction survey	Assign Set
Employee Performance	Employee Performance Metrics	Identify performance goals	Identify performance measurement tools	Assign Set
Employee Performance	Employee Performance Metrics	Identify performance goals	Design performance instrument	Assign Set
Customer Satisfaction	Customer Satisfaction Survey	Develop customer satisfaction survey	Analyze customer sat survey results	Assign Set
Customer Satisfaction	Customer Satisfaction Survey	Develop customer satisfaction survey	Review survey findings with team	Assign Set

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Assigning activity sets to employees

To assign activity sets, take these steps:

1. Click **Assign Activity Sets** from the Labor Distribution section on the Supervisor main menu.
The Activity Sets page opens.
2. Click **Assign Set** on the row that identifies the activity set you want to assign to one or more employees.
The Assign Activity Sets page opens. The Employees Currently Assigned table is displayed.
3. Click **Add Employees**.
A list of employees is displayed.

4. Click the check box next to each employee to whom you want to assign the activity set..
5. Click **Save**. The employees are listed in the Employees Currently Assigned table.
6. Click **Cancel** to go back to the previous page.

To remove employees from assigned activity sets, take these steps:

1. Click **Activity Sets** from the Labor Distribution section on the Supervisor main menu.
The Activity Sets page opens.
2. Click **Assign Set** on the row that identifies the set you want to work with.
The Assign Activity Sets page opens. The Employees Currently Assigned table lists employees assigned to the activity set.
3. Click the "X" under the Remove column on the row that identifies the employee you want to remove from the assigned set.
A confirmation message opens.
4. Click **OK** to confirm the deletion.
- OR -
Click **Cancel** to dismiss the operation.
5. Click **Cancel** to go back to the previous page.

webTA Case Tracking

Agencies may implement the Case Tracking module to track time and attendance data against specific cases. The Case Administrator adds, updates and deletes cases. Case Administrators and/or Supervisors and Master Supervisors must assign cases to organizations or employees before employees can add and track cases on timesheets. Depending on how the Case Tracking module is set up, cases are assigned to organizations or to individual employees. (The option is configured on the Case Tracking Preferences page, available from the System Set Up section of the Administrator main menu.) Cases must be assigned before employees can add and track cases on timesheets.

A sample Cases page is shown below; in this example, cases are assigned to employees.

Edit Case

Case Details

* ID: 001

* Name: 001

Active:

* Category: Civil Cases 000-100

* Case Status: Open

* Start Date: Nov 01, 2012

End Date:

Fund ID: 001-00001

Fund Start Date: Nov 01, 2012

Fund End Date:

Notes:

Case Assigned to

Last Name	First Name	User ID	Unassign
Smith	Tina	tsmith	<input type="checkbox"/>
Evans	Edna	eevans	<input type="checkbox"/>

1-2 of 2 Records << 1 >> View

[Assign Employee](#)

[Cancel](#)

Assigning cases to employees or organizations

Depending on how the Case Tracking module is set up, you assign cases to individual employees or to organizations. To assign cases, take these steps:

1. Click **Assign Cases** on the Supervisor or Master Supervisor main menu.
- OR -
Click **Cases** on the Case Administrator main menu.
The Cases page opens.
2. Click the **case ID link** or **case name link** that you want to work with.
The Case page opens.
3. Click **Assign Employee**. The Assign Employees page opens. Click the check box on the row that identifies the employee(s) you want to assign to the case and then click **Save**.
- OR -

Click **Assign Organizations**. The Assign Organization page opens. Click the check box on the row that identifies the organization(s) or sub-organization(s) you want to assign to the case and then click **Save**.

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

Removing assigned employees or organizations from cases

Depending on how the Case Tracking module is set up, you may remove assigned employees or organizations from cases.

To adjust assignments to cases, take these steps:

1. Click **Assign Cases** on the Supervisor or Master Supervisor main menu.
- OR -
Click **Cases** on the Case Administrator main menu.
The Cases page opens.
2. Click the **case ID link** or **case name link** that you want to work with.
The Case page opens.
3. Click the **"X"** on the row that identifies the employee you want to remove from the case.
- OR -
Click the **"X"** on the row that identifies the organization you want to remove from the case.
4. Click **Cancel** to go back to the previous page.

webTA Continuation of Pay (COP)

Employees who are injured while engaged in official work activities or on work premises may be eligible for Continuation of Pay (COP). If the employee meets eligibility criteria, the COP Administrator creates a COP event in webTA. Master Supervisors may view COP event information such as the date of injury, injury number, return to work date, COP not to exceed date, and COP used to date on the COP Event page.

COP Events										
Employee	User ID	Injury Number	Date Of Injury	COP Status	Return to Work Date	COP Used to Date	COP NTE Date	Organization	Delete	
Clark, Alex	aclark	1106	11/06/2012	Active	02/02/2013	0 Days	02/02/2013	MA	X	
Clark, Alex	aclark	1003	10/03/2013	Active		0 Days		MA	X	
Evans, Edna	eevans	1101	11/01/2012	Terminated		0 Days		Facilities	X	
Smith, Tina	tsmith	1001	10/01/2013	Active		0 Days		NFCEXAMPLE	X	

1-4 of 4 Records View 25 50 100

◀ ◁ 1 ▷ ▶

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

Viewing COP events

To view COP events, take these steps:

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

Viewing employee COP leave balances

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

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

webTA Telework

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

Depending on whether employees telework on a regular basis or on an intermittent basis, employees may need to submit telework agreements or telework requests.

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

All employee who participate in telework must submit a telework agreement for Supervisor approval. Approved agreement dates may impact workflow notifications, timesheet validations, validation error

messages, and whether the employee is classified as "Ready" in the employee profile. (Employees with approved agreements are identified as "Ready." Job positions are identified as "eligible.")

About telework agreements

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

Pending Approved Denied Terminated

Telework Agreement

Agency Guidelines
Agency guidelines as of January 1, 2014.

Employee Information
* Employee: Smith, Tina tsmith
Essential:

Telework Type
Regular/Routine:
Situational/Ad Hoc:

Agreement Dates
* Agreement Start: 02/10/2014
Agreement Expires:

Primary Telework Location
 Home
 Satellite Office
 Telework Center
 Other

Primary Telework Address and Phone
* Address 1:
Address 2:
* City:
* State:
* Zip:
* Telework Phone:
Telework Fax:

Requirements Completed
* Anti-viral Setup Approved by IT: * Date 02/03/2014
* VPN Setup Approved by IT: * Date 02/03/2014

Telework Schedule

Telework Day:	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office Day:	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Schedule Notes:

Characters remaining: 255

Other Comments

Remarks:

Characters remaining: 255

Approver Comments:

Characters remaining: 255

Termination Details

Termination Date:
Reason:
Termination Remarks:

Characters remaining: 255

Activity Log

Action	Resulting State	Action Date	Name	Remarks
Approve	Approved	02/06/2014 02:32 PM	Fryman, Christy	
Submit	Pending	02/06/2014 02:19 PM	Smith, Tina	

Telework Agreement page contents

Agency Guidelines

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

Employee Information

- Employee. The employee's name and user ID.
- Essential. The check box is automatically populated from the employee's employee profile, where the Essential field may be enabled.

Telework Type

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

Agreement Dates

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

Primary Telework Location

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

Requirements Completed

- Requirements are specific to each agency and are configured by the Telework Coordinator.
- Requirement Check Box. Enable the check box to indicate that the requirement has been met.
- Date. Enter the date that the requirement was met.

Telework Schedule

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

Other Comments

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

Termination Details

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

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

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

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

Adding telework agreements

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

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

The Telework Agreements page opens.

2. Click **Add New Agreement**.

The Telework Agreement page opens.

3. Complete the fields.

4. Click **Submit**.

-OR-

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

Approving and denying employee telework agreements

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

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

The Telework Agreements page opens.

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

The Telework Agreement page opens.

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

-OR-

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

A message confirms the action

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

Deleting telework agreements

Employees and Supervisors may delete telework agreements. Telework agreements must be in pending status before they can be deleted. Supervisors may revert telework agreements to pending status. To delete a telework agreement, take these steps:

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

The Telework Agreements page opens.

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

The Telework Agreement page opens.

3. Click **Delete**.

A confirmation message appears.

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

-OR-

Click **Cancel** to dismiss the operation.

Modifying telework agreements

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

To modify a pending telework agreement, take these steps:

1. Click **Employee Telework Agreements** under the Telework section on the main menu.
The Telework Agreements page opens.
2. Click the **telework agreement status link** on the row that identifies the agreement you want to modify.
The Telework Agreement page opens.
3. Make changes.
4. Click **Submit**.

-OR-

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

Reverting telework agreements

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

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

Terminating telework agreements

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

1. Click **Employee Telework Agreements** under the Telework section on the main menu.
The Telework Agreements page opens.
2. Click the **telework agreement status link** on the row that identifies the agreement you want to terminate.

The Telework Agreement page opens.

3. Type or specify a date in the **Termination Date** field.
4. Specify a reason from the **Reason** drop-down list.
5. Type a brief explanation in the **Terminator Remarks** text box.
6. Click **Terminate**.

A message confirms that the action was successful.

About telework requests

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

A sample Telework Request page is shown below.

Telework Request Pending Approved Denied

Telework Type and Dates
Employee: Fryman, Christy

* Telework Code: 01 - Telework Off Site Work-CRS

* Reason: Complex Project

Reason Notes:

Start Date	End Date	Start Time	Stop Time	Daily Hours	Total Hours	Action
Feb 13, 2014	Feb 14, 2014	9:00am	5:00pm	8:00	16:00	Delete

[Add New Row](#)

Remarks
Approver:
Comments:

Activity Log

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

Telework Request page contents

Telework Type and Dates

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

Remarks

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

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

Approving and denying employee telework requests

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

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

Reverting telework requests

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

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

webTA Emergency Contacts

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

A sample Emergency Contacts page is shown below.

Emergency Contacts

Last Name: First Name: Organization:

Essential:

Last Name	First Name	Organization	Essential Employee	Last Updated
Garcia	Ava	NFCEXAMPLE	Non-Essential	Oct 19, 2012 6:26 PM
Hall	Ethan	NFCEXAMPLE	Non-Essential	Dec 12, 2012 9:46 AM
White	Jay	NFCEXAMPLE	Non-Essential	Oct 19, 2012 5:48 PM
Wilson	Mia	NFCEXAMPLE	Essential	Dec 31, 2012 2:06 PM

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Viewing employee emergency contacts

To view contact information for employees, take these steps:

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

Designating essential employees

Depending on your role, you may be able to designate whether employees are classified as “essential” under emergency conditions. If the ECM module and license is implemented, the Essential field appears on the Employee Profile Settings page. By default, employees are classified as non-essential. To designate essential employees, take these steps:

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

Reports

The following webTA reports are available to Master Supervisors:

- Adhoc Report
- Leave Audit

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

Leave Audit

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

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

A sample report is shown below.

Leave Audit							
Report Date:	11/19/2014						
Pay Period Range:	22 - 2014 : Nov 02, 2014-Nov 15, 2014 to 23 - 2014 : Nov 16, 2014-Nov 29, 2014						
Employee :	Rodriguez, Toni						
Pay Period	Manual Adj	Forward	Accrued	Available	Used	Balance	Max Available
23 - 2014	0:00	64:00	4:00	68:00	0:00	68:00	80:00
22 - 2014	0:00	60:00	4:00	64:00	0:00	64:00	80:00

To generate a Leave Audit report, take these steps:

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

3. Use the following parameters:
 - Select the pay period range from the **From PP** and **To PP** drop-down lists.
 - Click the **Leave Type** drop-down list to select the type of leave.
4. Click **Run Report**.
5. To save the report in PDF, Excel, HTML, or CSV format, click the option at the top of the report. The File Download box opens. Click **Save**. The Save As dialog opens. Choose the location where you want to save the report, then click **Save**.
6. Click **Cancel** to go back to the Reports page.

webTA Advanced Reporting tools

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

Using the Report Schedule tool

Use the Report Schedule tool to run reports at regularly scheduled intervals. The tool is available on the report parameters page of any report to which you have access, as shown in the example below.

Default Schedules

Report Parameters

Employee:

Users: Active

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

Report Schedule

Name:

Export Type: PDF

Schedule Enabled:

Email Report After Completion:

Run In: Production Database

Hour of Day: Midnight

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

Report Parameters

Employee: Users: Active

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

Report Schedule page contents

The following fields appear on the Report Schedule page:

- Name. The name of the report.
- Export Type. The type of file output. Options include PDF, XLS (Microsoft Excel), CSV (Comma Separated Values), and HTML (Hyper Text Markup Language).
- Schedule Enabled. Click the check box to enable the schedule.

- Email Report After Completion. Click the check box to email a copy of the report upon completion.
- Run In. Whether the report will be run from the production instance or the archive/reporting instance.
- Hour of Day. The hour of the day that the report will run.
- Schedule. The day(s) of the week during the pay period that the report will run.

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

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

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View 25 | 50 | 100

Delete Email Cancel

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

My Saved and Scheduled Reports page contents

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

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

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

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

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

Adding and saving report schedules

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

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

Viewing saved and scheduled reports

To view a report schedule, take these steps:

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

E-mailing saved and scheduled reports to yourself

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

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

Modifying report schedules

To modify a report schedule, take these steps:

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

Deleting report schedules

To delete a report schedule, take these steps:

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

Using the Ad Hoc reports tool

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

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

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

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

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

Adhoc Report page content

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

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

Adhoc Report

*** Name:**

Description:

Published:

Row Height:

Report Type:

SQL Override:

Columns

Function	Column	Name	Width	Add Column	Delete
<input type="button" value="v"/>	User - Display Name with User ID	Employee	<input type="text" value="75"/>	<input type="button" value="+"/>	<input type="button" value="X"/>
<input type="button" value="v"/>	User - TL Unit	TL Unit	<input type="text" value="75"/>	<input type="button" value="+"/>	<input type="button" value="X"/>
<input type="button" value="v"/>	Timesheet - Validator Display Name With User ID	Validator	<input type="text" value="75"/>	<input type="button" value="+"/>	<input type="button" value="X"/>
<input type="button" value="v"/>	Timesheet - Date Validated	Date Validated	<input type="text" value="120"/>	<input type="button" value="+"/>	<input type="button" value="X"/>
<input type="button" value="v"/>	Timesheet - Certifier Display Name With User ID	Certifier	<input type="text" value="75"/>	<input type="button" value="+"/>	<input type="button" value="X"/>
<input type="button" value="v"/>	Timesheet - Date Certified	Date Certified	<input type="text" value="120"/>	<input type="button" value="+"/>	<input type="button" value="X"/>
<input type="button" value="v"/>	Timesheet - Type	Type	<input type="text" value="75"/>	<input type="button" value="+"/>	<input type="button" value="X"/>
<input type="button" value="v"/>	SUM	Timesheet TITO Entry - Total Hours w/o Meal	<input type="text" value="75"/>	<input type="button" value="+"/>	<input type="button" value="X"/>

Conditionals

Connector	Column	Operator	Value Type	Value	Add Column	Delete
<input type="button" value="v"/>	Timesheet - Pay Period FK	equal to	Runtime Parameter	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="X"/>

Group Bys

Column	Add Column	Delete
User - Display Name with User ID	<input type="button" value="+"/>	<input type="button" value="X"/>
User - TL Unit	<input type="button" value="+"/>	<input type="button" value="X"/>
Timesheet - Validator Display Name With User ID	<input type="button" value="+"/>	<input type="button" value="X"/>
Timesheet - Date Validated	<input type="button" value="+"/>	<input type="button" value="X"/>
Timesheet - Certifier Display Name With User ID	<input type="button" value="+"/>	<input type="button" value="X"/>
Timesheet - Date Certified	<input type="button" value="+"/>	<input type="button" value="X"/>
Timesheet - Type	<input type="button" value="+"/>	<input type="button" value="X"/>

Order Bys

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

Here is corresponding sample output form the ad hoc report:

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

General Information

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

- Name. The name of the report. This is a required field. The field supports up to 100 characters.
- Description. A short description. The field supports up to 255 characters. If the report will be available to other users, be clear about the purpose of the report.
- Published. Whether you want other users to be able to access the report. To allow access, click the check box; to disable access, clear the check box. Everyone who can view ad hoc reports will see published reports.
- Row Height. The row height for the report output, in pixels. If the value is too small for the content of a cell, it will expand vertically. You can specify the width of each column (see "Columns.")
- Report Type. The type of data that the report extracts from the database.
 - User Data. This option provides access to timesheet data.
 - Audit Data. This option provides access to audit log data. This option is limited to System Administrators.

An example of the General Information area is shown below:

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

SQL Override

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

Columns

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

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

An example of the Columns area is shown below:

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

Add Column
Delete All Columns

Conditionals

This feature lets you construct custom queries that include conditions.

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

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

An example of the Conditionals area is shown below:

Conditionals						
Connector	Column	Operator	Value Type	Value	Add Column	Delete
<input type="checkbox"/>	Timesheet - Pay Period FK	equal to	Runtime Parameter		<input data-bbox="1242 1270 1258 1291" type="button" value="+"/>	<input data-bbox="1323 1270 1339 1291" type="button" value="X"/>
<input data-bbox="267 1312 397 1333" type="button" value="Add Conditional"/>		<input data-bbox="422 1312 609 1333" type="button" value="Delete All Conditionals"/>				

Group Bys

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

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

Order Bys

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

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

Adding ad hoc reports

To add an ad hoc report, take these steps:

1. Click **Adhoc Reports** from the Reports section on the main menu.
The Adhoc Report Management page opens.
2. Click **Add New Adhoc Report**.
The Adhoc Report page opens.
3. Type a report name in the **Name** field. This is a required field.
4. Type a short description in the **Description** field.
5. Click the **Published** check box to allow other users to access the report. To limit the report to personal use, clear the check box.
6. Accept the default row height or type in a different height.
7. Accept the default value from the **Report Type** drop-down list.
8. Optionally, enter SQL commands in the **SQL Override** text box. (This option may not be available to all users.)
9. To add columns, take these steps:
 - Click **Add Column**. A new row is added under the Columns area.
 - Select a value from the **Column** drop-down list.

- Type a descriptive name in the **Name** field. (If the field is blank, the report displays the default column name.)
 - Accept the default row width or type in a different width
 - Optionally, select an operator from the **Function** drop-down list.
10. To add conditionals, take these steps:
- Click **Add Conditional**. A new row is added under the Conditionals area.
 - Select a value from the **Column** drop-down list.
 - Select a logic phrase from the Operator drop-down list.
 - Select an end user display option from the Value Type drop-down list. SME: Is this the purpose of Value Type?
 - Select a logic connector from the Connector drop-down list.
11. To specify the order in which columns are displayed in the report, take these steps:
- Click **Add Column**. A new row is added under the Group Bys area.
 - Select a value from the **Column** drop-down list.
12. To specify the order, take these steps:
- Click **Add Column**. A new row is added under the Group Bys area.
 - Select a value from the **Column** drop-down list.
13. Click **Save**. Click **Run Report** to test the output.
- OR -
- Click **Cancel** to go back to the previous page.

Modifying ad hoc reports

To modify an ad hoc report, take these steps:

1. Click **Adhoc Reports** from the Reports section on the main menu.
The Adhoc Report Management page opens.
 2. Click the **ad hoc report name link**.
The Adhoc Report page opens.
 3. Make changes.
 4. Click **Save**. A message confirms that the changes were saved.
 5. Click **Cancel** to go back to the previous page.
- OR -
- Click **Save and Run Report** to run the report with the changes you made.

Running ad hoc reports

To run an ad hoc report, take these steps:

1. Click **Reports** from the Reports section on the main menu.
The Reports page opens.
2. Click the **Adhoc Report name link**.

The Adhoc Report page opens.

3. Select the report from the **Adhoc Report** drop-down list.
4. Select a role from the **Role** drop-down list. Only roles to which you have been assigned are available.
5. Click the **Include Delegates** check box to see all employee data for all roles delegated to you. Clear the check box to see employee data limited to your direct role assignments.
6. Depending on the report, you may be able to select additional parameters.
7. Click **Run Report**.

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

- OR -

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

- OR -

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

Testing ad hoc reports

To test an ad hoc report, take these steps:

1. Click **Adhoc Reports** from the Reports section on the main menu.
The Adhoc Report Management page opens.
2. Click the **ad hoc report name link**.
The Adhoc Report page opens.
3. Click **Run Report** near the bottom of the page.
The Ad Hoc Report Parameters appear. Depending on the report, the parameters may vary.
4. Select the report that you want to test from the **Adhoc Report** drop-down list.
5. Select a role from the **Role** drop-down list. Only roles to which you have been assigned are available.
6. Click the **Include Delegates** check box to see all employee data for all roles delegated to you. Clear the check box to see employee data limited to your direct role assignments.
7. Depending on the report, you may be able to click **Pick Value** for pay period data, users, or AWS.
8. Click **Run Report**.

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

- OR -

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

- OR -

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

Deleting ad hoc reports

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

1. Click **Adhoc Reports** from the Reports section on the main menu.
The Adhoc Report Management page opens.
2. Click the "X" under the Delete column on the row that identifies report.
A message confirms that the report was deleted.

Troubleshooting common report errors

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