Kronos webTA 4.2

DOC Administrator User Guide

webTA 4.2
DOC Administrator User Guide
Document Revision History

Document Revision	Product Version	Release Date
A	Version 4.2.6	September 2015

Table of Contents

Introduction

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

This guide is written for users assigned the Administrator role in the webTA system. The Administrator has access to many functions across all organizations, including adding employees, managing accounts and organizations, configuring and running payroll provider management, and several other options for configuring and maintaining the system.

About the Administrator Main Menu

The Administrator main menu lists functions that are available to the Administrator role. The page also includes tabs for all other roles in the system. An example of the Administrator main menu page is shown below.

Working with Users and Profiles

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

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

About Employee Profiles

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

- Settings
- Licenses
- Calendars
- Locator Info
- Roles
- Timesheet Details
- Timesheet Profile
- Telework (if Telework license is enabled for the employee)

Below is a sample Employee Profile > Settings page:

Employee Profile page contents—Settings page

- **No Time Tracking**. Identifies whether the user records time and attendance in webTA. (DOC agencies do not use this option.)
- **User ID**. The login ID for the employee.
- **Password**. The employee's webTA user password. Passwords must conform to Agency guidelines. Employees may update passwords on this page.
- **Name fields**. The employee's first, middle and last name.
- **SSN**. The employee's social security number. Depending on your Agency's implementation of the webTA system, the SSN may be masked or unmasked. Also, Timekeepers, Master Timekeepers, and HR Administrators may be able to enter a new user's SSN when they manually add a user to the system. Once the user is added, however, the SSN may only be visible to the Administrator.
- **Active**. Indicates whether the employee is active (that is, eligible to use webTA) or inactive. When employees are inactivated, none of their records are deleted from the system, but they will no longer be able to log into the system, and their records are ignored during verification, certification, and transmission file builds.
- **Essential**. If the webTA Emergency Contact Management (ECM) module is implemented and the employee has a license, the check box indicates that the employee is "essential" during an emergency. By default, the check box is blank and employees are classified as non-essential.
- **Timekeeper**. The employee's assigned Timekeeper.

- **Supervisor**. The employee's assigned Supervisor.
- **Organization**. The employee's assigned organization and agency.
- **E-mail Address**. The e-mail address that the employee has been assigned so they can send and receive webTA messages from the designated e-mail application. Employees may update their e-mail address.
- **Timezone**. The time zone in which the employee is located.
- **Start Page**. Specify the default role for the main menu, if the employee is assigned more than one role.

Licenses page

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

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

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

   The Employees page opens.

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

   The Employee Profile page opens.

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

   The Licenses page opens.

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

5. Click **Save**.

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

Calendars page contents

The Calendars page lists all calendars to which the employee may be assigned.

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

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

   The Employees page opens.

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

   The Employee Profile page opens.

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

   The Calendars page opens.

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

5. Click **Save**.

Locator Info page contents

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

Roles page contents

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

Some roles have optional properties, described below.

Employee property

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

Timekeeper property

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

Master Timekeeper properties

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

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

Master Supervisor properties

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

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

HR Administrator properties

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

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

To enable roles for an employee, take these steps:

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

   The Employees page opens.

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

   The Employee Profile page opens.

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

   The Roles page opens.

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

5. Click **Save**.

Timesheet Details page contents

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

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

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

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

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

- **Start Pay Period for Timesheet**. The starting pay period in which the timesheet will be available. The default is the current pay period. A previous pay period or the current pay period may be specified.
- **Timesheet Entry Type**. Select Hours for duration-based timesheets or Time In/Time Out for punch-based timesheets.
- **Approvers**. These options designate who will validate and certify the employee's timesheet.

- **Timekeeper**. The timekeeper to whom the employee is assigned. Click **Search for Timekeeper** to locate the timekeeper's name. The Select User page opens. Click **Select** on the row that identifies the Timekeeper. You return to the previous page and the name appears in the field.
- **Supervisor**. The supervisor to whom the employee is assigned. Click **Search for Supervisor** to locate the supervisor's name. The Select User page opens. Click **Select** on the row that identifies the Supervisor. You return to the previous page and the name appears in the field.

To specify timesheet details, take these steps:

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

   The Employees page opens.

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

   The Employee Profile page opens.

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

   The Timesheet Details page opens.

4. Select options.

5. Click **Save**.

Working with Employee Profiles

Adding employees

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

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

   The Employee Profile >> New User page opens.

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

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

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

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

5. Continue specifying additional information.

   −OR−

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

Viewing employee profiles

To view an employee profile, take these steps:

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

The Employees page opens.

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

   The Employee Profile page opens.

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

Editing employee profiles

To edit an employee profile, take these steps:

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

   The Employees page opens.

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

   The Employee Profile page opens.

3. Make changes.

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

About Timesheet Profiles

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

The Timesheet Profile page is shown below.

Timesheet Profile » Davis, Bunny

Settings
Licenses
Calendars
Locator Info

▬ ▬ ▬ ▬ ▬ ▬ ▬

Roles
Timesheet Details
Timesheet Profile »
Telework

Items marked with an asterisk* are required.
Pay Period: 19 - 2015 : Sep 20, 2015-Oct 03, 2015

Status Change

Status Change Type: None
Status Change Day: None

Status

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

Pay Details

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

Overtime/Standby

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

Leave

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

Accounting

Accounting Type: Manual Account Entry

Pay Provider - NFC

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

[Cancel]

Timesheet Profile page contents

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

Pay Period

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

Status Change

- **Status Change Type**. Indicates the type of status change (Start or End) for mid-pay period accession and separations.
- **Status Change Day**. Indicates the day in the two-week pay period when the status starts or ends.

Status

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

Pay Details

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

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

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

OT/Standby

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

Leave

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

- **Leave Category Override**. Establishes the accrual category override that is not dependent on the SCD.
- **Leave Ceiling Override**. Specifies the leave ceiling that overrides the default leave ceiling for the Employee.
- **Home Leave Computation Date**. Indicates the start date for an Employee to participate in the home leave accrual program.
- **Home Leave Category**. Establishes the amount of home leave an Employee will accrue per pay period.
- **Home Leave End Date**. Indicates the end date for participation in the home leave accrual program.
- **VLTP Recipient**. Indicates the employee is a recipient of hours from the voluntary leave transfer program (VLTP).
- **VLTP Recipien**t. Indicates the employee is a recipient of hours from the voluntary leave transfer program (VLTP).
- **ELTP Recipient**. Indicates the employee is a recipient of hours from the emergency leave transfer program (ELTP).
- **FMLA Invoked, FMLA Expiration Date**. A check mark in the FMLA Invoked check box indicates that the employee's leave request for FMLA has been invoked and approved. A date in the FMLA Expiration Date field identifies the date that the employee's FMLA expires; this date is 12 months from the Start Date in the leave request. The check box and the date may be system-generated, or manually entered by a user. Two scenarios are described below.
    - webTA enables FMLA Invoked and populates the FMLA Expiration Date. This scenario takes place when an employee invokes and submits an FMLA leave request, and the employee's Supervisor approves the request. Upon Supervisor approval, webTA enables the FMLA Invoked check box in the employee's Timesheet Profile and populates the FMLA Expiration Date. The FMLA Expiration Date is 12 months from the Start Date in the leave request.
    - If the Supervisor denies the FMLA request, there are no changes in the Timesheet Profile.
    - If the Supervisor reverts an approved request to Pending, the system clears both the FMLA Invoked check box and the FMLA Expiration Date field.
    - Users manually enable the check mark and type the FMLA Expiration Date. Users who have system permission to edit the Timesheet Profile (Timekeepers, Master Timekeepers, HR Administrators, and Administrators) may manually enable the FMLA Invoked check box and type the FMLA Expiration Date, or clear the check box and FMLA Expiration Date. This may be useful if the leave request is adjusted and a manual update is required.
- **FMLA Military Invoked, FMLA Military Expiration Date**. (Please see the explanation above for FMLA Invoked, FMLA Expiration Date.)
- **Military Regular Leave Flag**. Indicates that the employee is entitled to military regular leave and generates the automatic accrual.
- **Military Emergency Leave Flag**. Indicates that the employee is entitled to military emergency leave and generates the automatic accrual.

Accounting

- **Accounting Type**. If the agency has implemented accounting, time in pay and dollar transactions must have an accounting code associated with them. Each agency may specify the method of entry for account information in the employee's timesheet. The following options are available:
    - **Manual entry**. The employee selects an account for each line of time in pay and dollar transactions.

- **Local**. The employee selects an account that is stored locally in webTA rather than at NFC. webTA then includes the accounting data in the transmission file to NFC. This option is useful for agencies that want to generate reports from webTA that are based on account codes, but have set accounts for employees.
- **Stored**. The employee selects an account that is stored at NFC. This option is useful for agencies in which all time in pay and dollar transactions are charged to the same account.

Pay Provider-NFC

- **Agency**. The agency that the employee's Timekeeper is assigned to. This data is populated from the Timekeeper's timekeeper profile.
- **State Code**. The state that the employee's Timekeeper is assigned to. This data is populated from the Timekeeper's timekeeper profile.
- **Town**. The town that the employee's Timekeeper is assigned to. This data is populated from the Timekeeper's timekeeper profile.
- **Unit**. The unit that the employee's Timekeeper is assigned to. This data is populated from the Timekeeper's timekeeper profile.

  NOTE: For Census Agency employees, the value in this field determines the employee's Division. The Division is the first segment of the Census Agency account string. The employee's Division is associated with a list of projects.
- **Timekeeper**. This data is populated from the Timekeeper's timekeeper profile.
- **New Contact Point**. Whether the contact information has been updated.

About Telework Profiles

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

Telework page contents

The Telework page contains these fields.

- **Telework Eligibility**. Whether the employee is eligible for telework as determined by their job responsibilities.

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

Payroll Management

About Payroll Provider Management

The Payroll Provider Management feature includes options for processing timesheet data, transferring timesheet data to a payroll provider, creating or modifying build schedules, and configuring parameters that handle the data transfer process.

NOTE: *Timesheets must be validated, certified, and pre-processed before they can be processed for payroll.*

Payroll Provider Management page contents

The Payroll Provider Management page provides the following options:

- Build timesheet data files using the **Run Build Now** or **Run Early Build Now** options.

- Transfer built data files to the payroll provider. Files may be transferred by a regularly scheduled job or you can run the transfer immediately by selecting the **Run Transfer Now** option. The system transfers all files that have not previously been transmitted. Depending on the size of the data files, the number of timesheets, and other factors, multiple files may be transferred.

- View details about files that were previously built and transferred in the Previous Builds table. You can view and download data files, review transmitted timesheets, and view the status of the transfer.

- Edit parameters that determine the transfer configuration. Parameters are listed below:

  - **Host Name**. The name of the host.

  - **File Name**. The transfer file name.

    Depending on what you want to export, you may append parameters to the transfer file name. The parameter name identifies the type of data that will be rendered when the file is transported to the payroll provider. For example, AGENCY_FESI_{EXPORT_ID} is rendered as AGENCY_FESI_1059. The rendered name is the name of the file that is delivered by FTP to the payroll provider's site

    Here are some important tips:

    Tip #1: You may append more than one parameter to the file name.

    Example:
    AGENCY_FESI_{PROVIDER_NAME}{EXPORT_TYPE}{PAY_PERIOD_YYPP}{TA_COUNT}

    Tip #2: Each parameter must be enclosed in brackets.

    Correct Example: {EXPORT_DATE}

    Incorrect Example: EXPORT DATE

    Tip #3: Do not include blank spaces between parameters.

    Correct Example: {PAY_PERIOD_YYPP}{TA_COUNT}

    Incorrect Example: {PAY_PERIOD_YYPP} {TA_COUNT}

    Tip #4: Do not include blank spaces between the bracket and the parameter name.

    Correct Example: {EXPORT_DATE}

    Incorrect Example: { EXPORT_DATA}

    Parameter Names

    EXPORT_ID

EXPORT_DATE

EXPORT_DATE_YYDDD

EXPORT_TIME

PROVIDER_NAME

TA_COUNT

EXPORT_TYPE

PAY_PERIOD_YYPP

CURRENT_DATE

CURRENT_DATE_YYYY

CURRENT_DATE_MM

CURRENT_DATE_DD

CURRENT_TIME

CURRENT_TIME_HH

CURRENT_TIME_MM

CURRENT_TIME_SS

FILENAME

DIRECTORY

POST_PROCESS_DIRECTORY

REMOTE_HOST

REMOTE_USER

REMOTE_PASS

- **User Name** and **Password**. The host user name and password relate to FTP and SFTP protocols and are used for authenticating to those systems.

  NOTE: For users with read-only permission, the Password field is blank. For users with permission to make edits, the Password field is masked.

- **Site Command**. The payroll provider may require a specific site command for configuring the FTP server.
- **JCL**. Use the JCL text box to append data to the beginning of the build file.
- **# Retries**. The number of retry attempts if the transfer fails.
- **Retry Delay (secs)**. The number of seconds to wait between retry attempts. If a transfer fails all attempts, the job fails. If the job has been set up to handle failures, the system may make additional attempts.
- **Use Passive Mode**. Certain firewall rules prevent active FTP transmission. If this is the case, a passive FTP connection must be established.
- *NOTE: This should only be done under the advisement of your payroll provider.*
- **Debug Connection**. Allows for diagnostic information during an FTP transmission.
- Create a build schedule that automatically creates the data file at regularly scheduled intervals.

The Payroll Provider Management page is shown below.

Administrator Main Menu >

Payroll Provider Management

Currently Selected Provider: NFC Payroll Provider

Previous Builds

Build ID	Build Date	Type	Status	Status Details	Status Date	# Timesheets	Requested By
No Build Files Found							

No results

[Run Build Now]   [Run Early Build Now]   [Run Transfer Now]

Edit Build Schedule
Next Build: Jan 1, 9999 12:00 AM MST

Build Schedule

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

[Save Build Schedule]   [Disable Build Job]

Edit Transfer Config
Next Transfer: Sep 21, 2015 9:05 AM

Host Name:	HOST
File Name:	XMIT.DAT
User Name:	USER
Password:	••••
Site Command:	COMMAND
JCL:	JCL
# Retries:	0
Retry Delay (secs):	30
Use Passive Mode:	☐
Debug Connection:	☐

[Save Transfer Config]   [Disable Transfer Job]

[Compare Build]   [Cancel]

The Previous Builds table on the Payroll Provider Management page contains details about data transfer jobs that have run. Click the **View** drop-down menu to see options for downloading the contents of a build file in .txt format, view the timesheets, or skip the transfer.   The build file is a fixed-width column format.

Processing and transmitting timesheets to payroll providers

To process and transmit timesheets to the payroll provider, take these steps:

1. Click **Payroll Provider Management** from the Payroll section on the main menu.

   The Payroll Provider Management page opens.

2. To create a data file that contains data from *previous* pay periods, click **Run Build Now**.

   –OR–

   To create a data file that contains data from the *current* pay period, click **Run Early Build Now**.

3. To transfer the data file to the payroll provider immediately, click **Run Transfer Now**.

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

Comparing DOC builds

The Administrator may compare the webTA build file to the NFC transmission file that contains the transmitted data. The purpose of the comparison is to verify that changes have not been made to the data in webTA or at NFC once the transmission has taken place.

When the compare builds process is complete, one of the following outcomes occurs:

- First, the transmission records you upload could fail to match any records contained in webTA. This can happen if you try to compare an old file, such as one generated outside of webTA. It will also happen if you try to compare files generated by webTA before webTA supported the transmission file comparison function. In this case, transmission file comparisons must be performed manually, by locating the correct build number on the build history page, and performing the comparison yourself.

- The second result is that webTA finds an associated payroll record, but that the transmission records contained in webTA do not match the data in the transmission file. This would indicate that either the transmission file has been changed, or that a newer record has since been generated in webTA. In this case, you must manually compare the two records to determine the differences. The comparison results page will identify the appropriate build number, and you can download the corresponding transmission file from the build history page.

- Finally, webTA can determine that the two records match exactly. This indicates that the most recent build of payroll records for the employee for that pay period matches the file you uploaded.

The transmission file comparison feature is not required for normal payroll operations within webTA. It is only used when you must audit that existing transmission files match the transmission records contained within webTA.

To compare builds, take these steps:

1. Click **Payroll Provider Management** from the Payroll section on the Administrator main menu.

   The Payroll Provider Management page opens.

2. Click **Compare Build** near the bottom of the page.

   The Compare Build page opens.

3. Click **Browse** to select the NFC transmission file.

4. Click **Compare**.

   A message displays the outcome.

Viewing status details and downloading data files

The Previous Builds table on the Payroll Provider Management page contains details about data transfer jobs that have run. To view details or download files, take these steps:

1. Click **Payroll Provider Management** from the Payroll section on the main menu.

   The Payroll Provider Management page opens.

2. Under the Previous Builds selection box, click the **View** drop-down menu on the row that identifies the build job you want to examine.

3. Select **Download** to save the data in a text file.

   –OR–

   Select **Show Timesheets** to review the timesheets. The Timesheet Selection page opens. Click **Select Pay Period ##** on the row that identifies the timesheet to view. Click **Cancel** to return to the Payroll Provider Management page.

   –OR–

   Select **Skip Transfer** from the drop-down list to cancel the transfer.

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

Creating or modifying build schedules

To create or modify a build schedule, take these steps:

1. Click **Payroll Provider Management** from the Payroll section on the main menu.

   The Payroll Provider Management page opens.

2. Under the **Edit Build Schedule** section, select the day of the week and the hour of the day on which the build will run.

3. Click **Save Build Schedule**.

   A message confirms that the schedule was saved.

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

Disabling build jobs

To disable a build job, take these steps:

1. Click **Payroll Provider Management** from the Payroll section on the main menu.

   The Payroll Provider Management page opens.

2. Under the **Edit Build Schedule** section, click **Disable Build Job**.

   A message confirms that the build will not run automatically until the schedule is enabled.

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

Creating or modifying transfer schedules

To create or modify a transfer schedule, take these steps:

1. Click **Payroll Provider Management** from the Payroll section on the main menu.

The Payroll Provider Management page opens.

2. In the Transfer Schedule table, select the day of the week and the hour of the day on which the transfer will run.

3. Click **Save Transfer Schedule**.

A message confirms that the schedule was saved.

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

Disabling transfer jobs

To disable a build transfer job, take these steps:

1. Click **Payroll Provider Management** from the Payroll section on the main menu.

The Payroll Provider Management page opens.

2. Click **Disable Transfer Job** at the bottom of the page.

A message confirms that the transfer will not run automatically until the job is enabled.

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

Editing the transfer configuration

To edit the data transfer configuration, take these steps:

1. Click **Payroll Provider Management** from the Payroll section on the main menu.

The Payroll Provider Management page opens.

2. Type the name of the host in the **Host Name** field.

3. Accept the default transfer file name (xmit.dat) or type a name in the **File Name** field.

4. Type the host **User Name** and **Password**. These relate to FTP and SFTP protocols and are used for authenticating to those systems.

5. If the payroll provider requires a specific "SITE" command for configuring the FTP server, enter the command in the **SITE** field. Otherwise, the field can be blank.

6. The **JCL** text box may be used to append data to the beginning of the build file.

7. If a transfer fails, you can specify the number of retry attempts in the # **Retries** field and the number of seconds to wait in the **Retry Delay** field. If a transfer fails all attempts, the job fails. If the job has been set up to handle failures, the system may make additional attempts.

8. Certain firewall rules prevent active FTP transmission. If this is the case, a passive FTP connection must be established. Click the check box next to **Use Passive Mode** to establish a passive connection.

   IMPORTANT: This should only be done under the advisement of your payroll provider.

9. Click the check box next to **Debug Connection** to allow for diagnostic information during an FTP transmission.
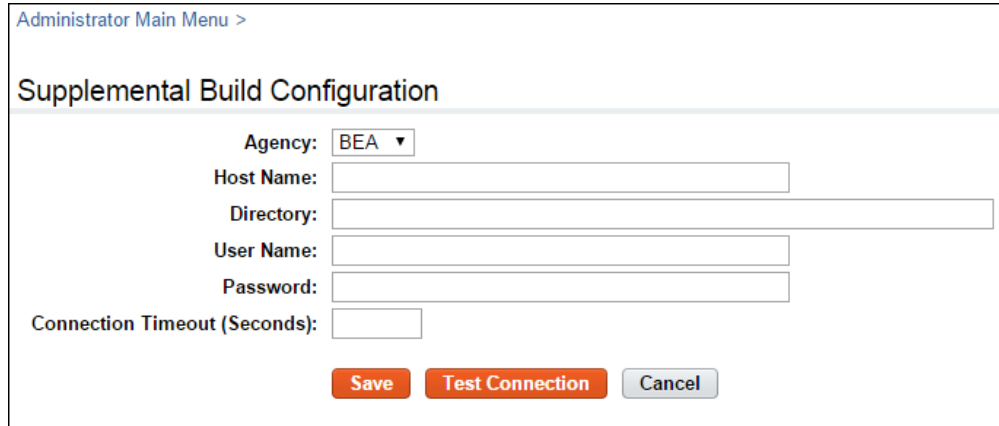
10. Click **Save Transfer Config**.

A message confirms that the transfer configuration has been saved.

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

About Supplemental Build Configuration

Administrators use this feature to specify connection parameters for supplemental build files created by BEA and NIST Primary Timekeepers. The file is sent via SFTP to the host identified in the Host Name field.

```
Administrator Main Menu >

Supplemental Build Configuration
─────────────────────────────────────────────────────

                    Agency:  [ BEA ▾ ]
                 Host Name:  [                    ]
                 Directory:  [                            ]
                 User Name:  [                    ]
                  Password:  [                    ]
  Connection Timeout (Seconds):  [        ]


              [ Save ]  [ Test Connection ]   [ Cancel ]
```

Supplemental Build Configuration Page contents

Agency. The agency associated with the Timekeeper who creates the build.

Host Name. The SFTP server host name or IP address.

Directory. The host server location where the file is sent. The Directory setting must be specified in absolute terms.

User Name. The authorized user name for the SFTP server.

Password. The authorized password for the SFTP server.

Connection Timeout (Seconds). How many seconds the attempt to connect will continue before it automatically times out.

To configure the connection, take these steps:

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

2. Complete the fields.

3. Click **Save**.

4. Click **Test Connection** to verify that the parameters are correct.

   A message confirms the connection is successful and includes the path to the location of the test file. The filename format is SupplementalBuildTest-mmddyyyyhhmmss.txt.

   –OR–

   An alert warns "Could not connect to SFTP server" and includes the SFTP path.

System Diagnostics

Error Management

Administrators may use the Error Management function for diagnostic and troubleshooting purposes. The Error Management page lists the following descriptors for each error:

- **Date/Time**. The date and time that the error occurred. For example, 10/16/2013 16:07:39
- **Error Code link**. The system-generated code assigned to the error. The link opens the Error Details page, described below.
- **Originating Page**. The application page where the error occurred. For example, Job Management.
- **Error Message**. The message that the system displayed when the error occurred. For example, Request processing failed.

The Error Details page includes the full stack trace of the error. This information is especially helpful for Kronos Technical Support. You may download the error details and save the file locally or e-mail it to Kronos or your agency's help desk.

The Set Storage Limits section near the bottom of the Error Management page includes these options:

- **Automatically delete errors older than**. Type a number, in days.
- **Store no more than**. Specify the number of errors that will be stored, for example, 10000.
- **Manually delete errors older than**. Type a number, in days. Optionally, click **Delete Now** to immediately delete errors.
- **Manually delete errors whose message contains**. Type a string that is contained in the error messages you want to delete.

To view and download error details, take these steps:

1. Click **Error Management** from the System Diagnostics section on the Administrator main menu.

   The Error Management page opens.

2. Click the **error code link** that you want to view in detail.

   The Error Detail page opens.

3. View the details.

4. Click **Download** to save the details in a file.

    –OR–

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

System Set Up

The System Set Up section on the Administrator main menu contains a variety of functions that the Administrator may use to configure and maintain the system. Options are listed below.

- **About**. View technical information about the webTA application that may be useful for troubleshooting.
- **Manage Accounts**. Add, edit or delete accounts and account values.
- **Application Banner**. Set up text that appears on each application page.
- **Application Management**. Provides options for the run mode, application e-mail address, web address prefix, and default time zones.
- **Audits**. Enable or disable audit log channels.
- **Calendar Management**. Edit the US federal holiday calendar or add new calendars.
- **Data Dictionary**. Access table views in the database, including specific information about data types and layout.
- **Email Management**. Configure e-mail sources to interface with an SMTP server.
- **Export Job Management**. Configure and schedule export jobs.
- **Import Job Management**. Configure and schedule import jobs.

Intermediate Approver Preferences.

- **Jobs Management**. Enable, disable, monitor and schedule jobs that run as background server processes.
- **LDAP Management**. Configure LDAP options.
- **License Management**. Manage user licenses.
- **Login Banner**. Set up text that appears on the Login page.
- **Message Management**. Enable or disable messages that the system sends to users upon completion of system functions.

Migration Management.

- **Organization Management**. Add, edit, or delete organizations or sub-organizations, manage members, and assign Timekeepers, Supervisors, and T&A Administrators to organization roles.

Password Message.

- **Pay Period Management**. Specify pay period restrictions.
- **Rule Management**. Configure, enable or disable rule sets that perform validation checks.
- **Script Execution**. Run automated tasks.
- **Send System Wide Message**. Create and send messages to all users.
- **Server Management**. View the server name, status, UUID, IP and port information.
- **Session Management**. Set session timeouts.
- **Single Sign-On Management**. Allow single sign on authentication using either an HTTP header value or HTTP remote user schemes.
- **Transaction Code Management**. Add, edit, enable or disable transaction codes.

About

The About page contains information about the webTA version, application server, database version and database connection. The Generate Thread Dump option may be useful for creating a JVM thread dump that can be sent to Kronos for diagnostic purposes.

The About page is shown below.

To view the About page, take these steps:

1. Click **About** on the Administrator main menu.

   The About page opens.

2. Click **Cancel** to return to the main menu.

Application Banner

The application banner appears in the upper left corner of the top of every page. Click the Preview option to view the appearance of the text before you save it.

Adding or modifying application banner text

To add or modify the banner text, take these steps:

1. Click **Application Banner** on the Administrator main menu.

   The Application Banner page opens.

2. To add or modify banner text, click the cursor in the text box and enter the new text.

3. To format the text, use Hypertext Markup Language commands (HTML). For example, to format bold text, use the HTML bold formatting commands and .

4. Click **Preview** to verify the banner text.

   The modified text appears under Preview of new Application Banner near the top of the page.

5. Click **Save** and then click **Cancel** to return to the main menu.
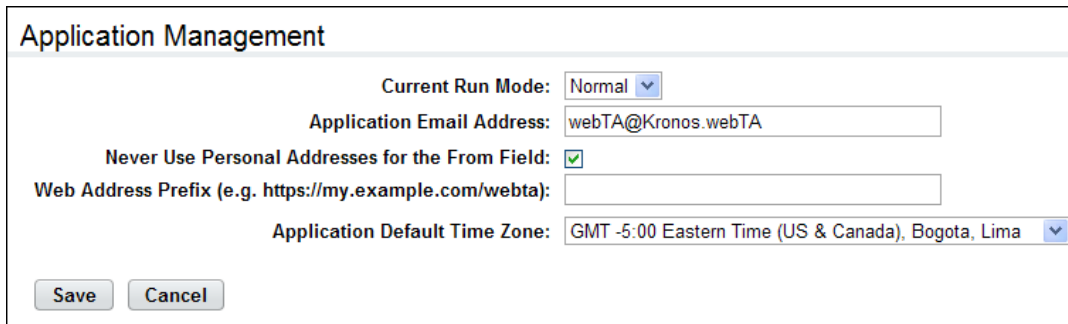
Deleting application banner text

To delete banner text:

1. Click **Application Banner** on the Administrator main menu.

    The Application Banner page opens.

2. Click **Delete** and then click **Cancel** to return to the main menu.

Application Management

Use the Application Management function to specify system settings such as the external web address prefix and the system sender e-mail address. The Application Management page is shown below.

Application Management page contents:

- **Current Run Mode**. These options are available:
    - **Normal**. In this mode, the system can be accessed by all users.
    - **Locked**. In this mode, users must have the permission "Manage Application Status" enabled in order to access the system. This mode is generally used when troubleshooting is being performed on the system.
- **Application E-mail Address.** Appears in the "From" section of e-mails that are generated by the system. For example, a supervisor may receive a message about timesheet certification from webTA@Kronos.com. In this example, webTA@Kronos.com is the application e-mail address.
- **Never Use Personal Addresses for the From Field.** If the check box is enabled, the system uses the application e-mail address instead of the personal address of the sender (for example, the Timekeeper or Supervisor.) This ensures that when the employee responds to the message, the response takes place in the webTA message system.
- **Web Address Prefix**. Identifies the prefix of the external URL path name, for example, https://www.abcd.org/webta.
- **Application Default Time Zone**. Identifies the default time zone on which the application should base all time calculation, for example, Eastern Standard Time.

Modifying application management options

To view or edit application management options, take these steps:

1. Click **Application Management** on the Administrator main menu.

    The Application Management page opens.

2. Make changes.

3. Click **Save** and then click **Cancel** to return to the main menu.

Audits

Use the Audits function to monitor actions that are performed in specific areas of the system. If enabled, the audit type captures information that you can examine for troubleshooting purposes. It is recommended that you only enable audits as needed; enabling all audit logs may affect system performance.

Some reports display audit information, such as the Login Audit Report. If the audit options related to login information (Login Failed, Login Successful) are not enabled, the report does not produce any output. The Audit Type Configuration page is shown below.

Audit Type Configuration

Checkmark system items to audit.

Items marked with an asterisk* are required.

Audit Type Configuration

Name	Description	Logs
☐ Account Structure Deleted	An account structure has been deleted	View
☐ Account Structure Updated	An account structure has been created or modified	View
☐ Activity Structure Deleted	An activity structure has been deleted	View
☐ Activity Structure Updated	An activity structure has been created or modified	View
☐ Build Transactions	A build ran or was scheduled for execution.	View
☐ Dollar Request Modified	A dollar request was created, updated, or deleted	View
☐ ECM Contact Footer Updated	Change made to ECM contact footer	View
☐ ECM Record Created	An emergency contact record was created	View
☐ ECM Record Deleted	An emergency contact record was deleted	View
☐ ECM Record Updated	An emergency contact record was updated	View
☐ Email Sent	An email has been sent out by the system	View
☐ Job Completed	A scheduled job completed	View
☐ Job Failed	A scheduled job failed while running	View
☐ Job Started	A scheduled job began running	View
☐ Leave Request Modified	A leave request was created, updated, or deleted	View
☐ Leave Transfer Program	Leave donations and deductions are created, updated, or deleted	View
☐ Logged Error	An error has been written to the log files	View
☐ Login Failed	A user failed to be authenticated by the system	View
☐ Login Successful	A user was successfully authenticated in the system	View
☑ Manual Leave Adjustment Saved	Audits each time a manual adjustment is made to a leave balance. This audit should always be enabled.	View
☐ Password Change	User's password has been reset or modified	View

* Delete log entries older than: [　　　　] Days

[Save] [Cancel]

Enabling or disabling audit logs

To enable or disable audit logs, take these steps:

1. Click **Audit** on the Administrator main menu.

    The Audit Type Configuration page opens.

2. Click to select check boxes for the types of audits you want to enable.

−OR−

Clear check boxes to disable audit logs.

3. Click **Save** and then click **Cancel** to return to the main menu.

Viewing audit logs

To view audit logs, take these steps:

1. Click **Audits** on the Administrator main menu.

   The Audit Type Configuration page opens.

2. To view data, click **View** on the row that identifies the audit type.

   The Audit Logs page opens.

3. Accept the default date range or specify a new date range.

4. Click **Update**.

   The log entry date, name of user, and message information appears.

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

Deleting audit logs

To specify how frequently audit entries are deleted, take these steps:

1. Click **Audits** on the Administrator main menu.

   The Audit Type Configuration page opens.

2. Type a number in the **Months** field near the bottom of the page. The default is 2 months. The minimum is 1 month and the maximum is 999 months.

3. Click **Save** and then click **Cancel** to return to the main menu.

Calendar Management

Use the Calendar Management function to add or modify holiday calendars or unfunded mandate calendars. Assign calendars to employees on the Employee Profile > Calendar page. Calendar days may be individually enabled to populate on timesheets.

By default, the US Federal Holiday calendar automatically updates for nine years (the calendar adheres to the OPM Schedule.) The Administrator may add, edit or delete individual calendar days or add, edit or delete calendars.

Calendar page contents

- **Name**. The name of the calendar.
- **NFC Transaction**. The transaction code to which the calendar days will be charged.
- **Calendar Type**. Whether the calendar is a Holiday Calendar or an Unfunded Mandate Calendar.
- **Assign to All Employees**. Enable the check box to assign the calendar to all employees in the organization. Alternatively, assign calendars to employees on the Employee Profile > Calendar page.

Adding calendars

To add a new calendar, take these steps:

1. Click **Calendar Management** on the Administrator main menu.

   The Calendar Management page opens.

2. Click **Add Calendar**.

   The Calendar page opens.

3. Type a calendar name in the **Name** field.

4. Click the **Transaction** drop-down menu to specify a transaction code that will be associated with the calendar day in the employee's timesheet.

5. Click the **Calendar Type** drop-down list to specify whether the calendar is a Holiday Calendar or an Unfunded Mandate Calendar.

6. Enable or clear the **Assign to All Employees** check box.

7. Accept the default year.

   −OR−

   Select a year from the **Holidays for** drop-down list and then click **Change Year**.

8. Insert the cursor in the **Name** field on the first row and type the name of the first holiday.

9. Type a date in the **Date** field using the format mm/dd/yyyy or click the **calendar icon** and select a date.

10. Click the **Populate on Timesheet** check box if the calendar day should automatically populate in timesheets for employees to whom you assign the calendar.

11. Click **Save** to save the calendar. A message confirms that the calendar was saved.

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

Editing holiday calendars

To edit a calendar, take these steps:

1. Click **Calendar Management** on the Administrator main menu.

   The Calendar Management page opens.

2. Click the **calendar name link** that identifies the calendar you want to modify.

   The Calendar page opens.

3. Change the calendar name, select a different transaction code from the Transaction drop-down list, modify names, change dates and enable or disable the Populate on Timesheet check box.

   −OR−

   Click **Add New** to add a new row. Type a new calendar day name, specify a date and enable or disable the Populate on Timesheet check box.

   −OR−

   Click the "**X**" on a row that identifies a day you want to remove from the calendar.

4. Click **Save**.

   A message confirms that the updates were saved.

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

Deleting holiday calendars

Before you delete a calendar, you must unassign employees who are assigned to the calendar, otherwise, the delete function is not available. To delete a calendar, take these steps:

1. Click **Calendar Management** on the Administrator main menu.

   The Calendar Management page opens.

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

   A confirmation message appears.

3. Click **Yes** to delete the calendar. A message confirms that the calendar was deleted.

–OR–
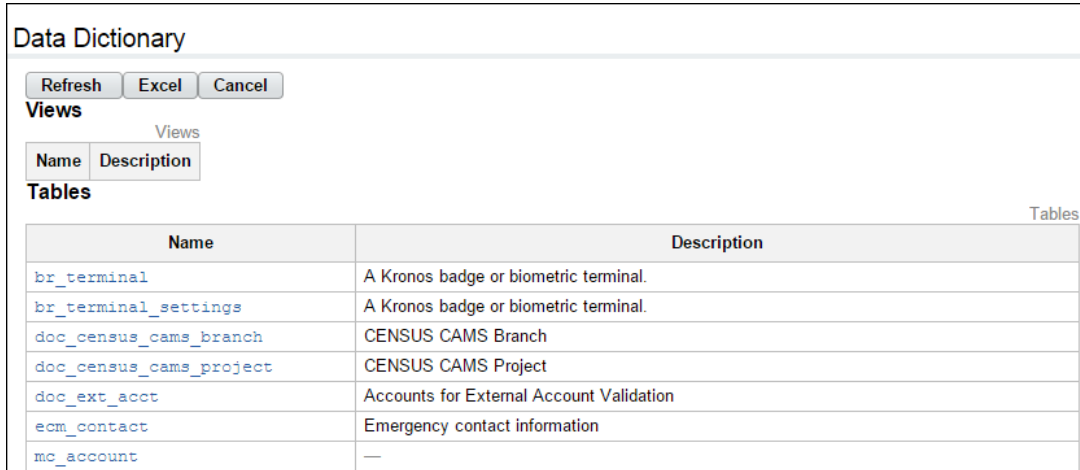
Click **Cancel** to cancel the operation.

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

Data Dictionary
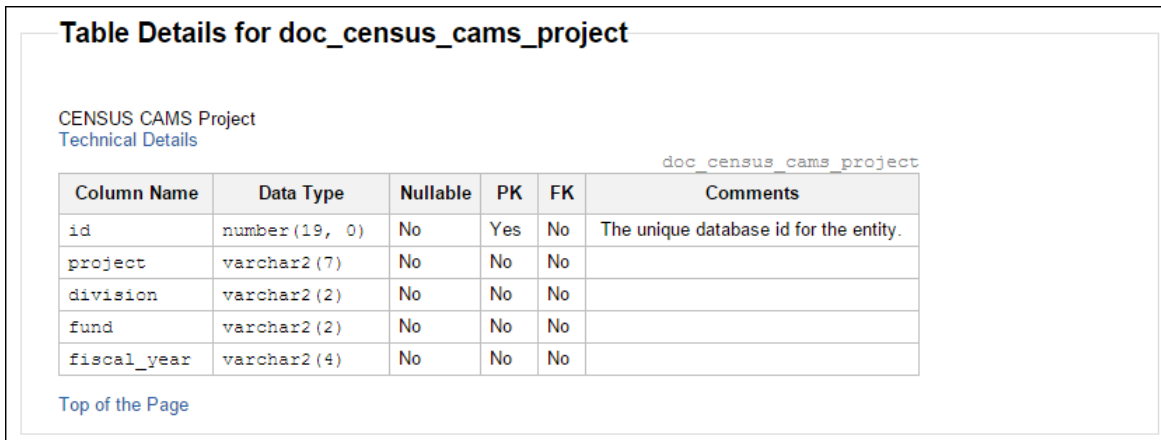
The Data Dictionary lists view details and table details contained in the database. It includes specific information about data types and layout. An example of the Data Dictionary page is shown below:

To view details on each table view, click the **view link** under the Name column. An example View Details page is shown below.

Exporting the data dictionary to Excel

The Administrator may export the data dictionary to an Excel spreadsheet. The spreadsheet columns include Table Name, Column Name, Data Type, Nullable, PK (Primary Key), FK (Foreign Key) and Comments.

To export the data dictionary to Excel, take these steps:

1. Click **Data Dictionary** on the main menu.

The Data Dictionary page opens.

2. Click **Excel**.

   The File Download dialog opens.

3. Click **Open** to view the data dictionary in Excel.

   –OR–

   Click **Save** to save the data dictionary to an Excel file.

Email Management

Use this option to configure the e-mail management function in webTA to interface with an SMTP server. The Email Management page is shown below.

Email Management

Items marked with an asterisk* are required.

E-mail Format

○ HTML
◉ Plain Text

E-mail Source

* Name:	
* Host:	
* Port:	25
* Batch Size:	900
* Delay Between Batches in Seconds:	20
Enabled:	☑
Test Email Address:	
Authentication:	☐
Authentication Username:	
Authentication Password:	
Header:	
Footer:	

Save   Send Test Email   Cancel

Email Management page contents

E-mail Format

- **HTML**. The e-mail format is HTML. This is a global setting for the entire application.
- **Plain Text**. The e-mail format is plain text. This is a global setting for the entire application.

E-mail Source

- **Name**. The SMTP source name.
- **Host**. The SMTP host name or IP address.
- **Port**. The port (this can be blank if it is the default port.)
- **Batch Size**. The number of e-mails that will be sent over an SMTP connection before closing the connection and opening a new SMTP connection.
- **Delay Between Batches in Seconds**. The number of seconds to wait in between batches of e-mails. Use this to manage the speed at which e-mails are sent to the SMTP server(s) to prevent overloading the SMTP server(s).
- **Enabled**. Whether the e-mail source is enabled.
- **Test Email Address**. Test messages will be sent to the test e-mail address every night.
- **Authentication Username, Password**. If the SMTP server requires authentication in order to connect to it, enable the check box, and then specify the username and password.
- **Header**. A standard header for all e-mail messages.
- **Footer**. A standard footer for all e-mail messages.

Configuring e-mail sources

To configure e-mail sources, take these steps:

1. Click **Email Management** on the Administrator main menu.

   The Email Management page opens.

2. Click the radio button next to **HTML** or **Plain Text** to determine the formatting. This is a global setting for the entire application.

3. Edit or enter the SMTP source name, the hostname, or IP address, and the port (it can be blank if it is the default port).

4. Accept or clear the check box next to Enabled.

5. Optionally, type a test email address.

   NOTE: If you enter an e-mail address in the Test Email Address field, the system automatically sends a test email every night.

6. If the SMTP server itself requires authentication in order to connect to it, enable the Authentication check box.

7. Optionally, specify an authentication user name and password.

8. Optionally, type a header in the Header field and a footer in the Footer field.

9. Click **Save**.

   A message confirms that the updates were saved.

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

11. Click **Send Test Email** to send a test e-mail.

     A message confirms whether the email was sent.

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

Export Job Management

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

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

The following export types are available to the Administrator:

- Core Export Account
- Core Export Account Assignments
- Core Export Account Fields
- Core Export Case Management Cases
- Core Export Labor Distribution Activities
- Core Export Labor Distribution Activity Sets
- Core Export Leave Balance Expirations
- Core Export Leave Balances
- Core Export Organization Roles
- Core Export Organization Tree
- Core Export Shifts
- User Organization Assignment
- Core Export Users
- Core Export Users Role Assignment
- Core Export Work Schedules
- DOC Webfred Export
- NFC Export Leave Balance Migration Differences
- NFC Export Organization Account Validation Job
- NFC Export Personnel

The Export Job page is shown below.

Export Job page contents

The Export Job page contains these fields:

- **Name**. The name of the export job.
- **Export Type**. The type of export that will be run, for example, "Core Export Users."
- **Payroll Provider**. If multiple payroll providers are defined in the system, select the one you want to use.
- **Disabled**. Whether the job is enabled or disabled.
- **Protocol**. Determines how to read the export file.
    - **Local file**. Reads the export file from the server's local file system.
    - **FTP**. Reads the export file via File Transfer Protocol (FTP).
    - **SFTP**. Reads the export file via Secure File Transfer Protocol (SFTP).
- **Directory**. The directory to which the export file will be written. It can be written to a local file system, or to an FTP site or SFTP site. The directory field identifies the location on those respective targets.
- **Filename Pattern**. Determines the filename pattern to match when looking for export files. For example, if you specified the filename pattern `my_export_[CURRENT_DATE].txt` then the

resulting filename would, for example, be `my_export_20130220.txt`. Optionally, use the following variables with the filename as demonstrated in the example:

`CURRENT_DATE`. The current date in YYYYMMDD format.

`CURRENT_TIME`. The current time in HHMMSS format.

`DIRECTORY`. The directory specified.

`REMOTE_HOST`. The host name specified.

`REMOTE_USER`. The user specified.

`REMOTE_PASS`. The password specified.

`PP`. The current pay period number.

`YYYY`. The current pay period year.

- **Hostname**. If the protocol is FTP or SFTP, type the hostname.
- **User**. If the protocol is FTP or SFTP, type the username for authentication.
- **Password**. If the protocol is FTP or SFTP, type the password for authentication.
- **# Retries**. Number of retries to attempt when failures occur.
- **Retry Delay (secs)**. Number of seconds between retries.
- **Execute Multithread**. Indicates whether the job should be run multi-threaded.
- **Edit Schedule**. Set up a schedule that determines when the jobs will run.

About the Create Test Record option

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

About the Edit Deletion Job option

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

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

Adding or modifying export jobs

To add or modify export jobs, take these steps:

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

   The Export Job Management page opens.

2. Click **Add New**.

   –OR–

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

   The Export Job page opens.

3. Complete the fields.

4. Click **Save**. A message confirms that the job and/or updates were saved.

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

Enabling or disabling export jobs

To enable or disable export jobs, take these steps:

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

   The Export Job Management page opens.

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

   The Export Job page opens.

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

   –OR–

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

4. Click **Save**. A message confirms that the update was saved.

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

Scheduling export jobs to run

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

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

   The Export Job Management page opens.

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

   The Export Job page opens.

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

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

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

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

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

   The Export Job Management page opens.

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

   The Export Job page opens.

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

4. Click **Save**. A message confirms that the update was saved.

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

Deleting export jobs

To delete an export job, take these steps:

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

The Export Job Management page opens.

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

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

Creating or parsing test records

To create or parse test records, take these steps:

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

   The Export Job Management page opens.

2. Click **Create Test Record**.

   The Create Test Export Record page opens.

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

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

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

   −OR−

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

Working with the Edit Deletion Job option

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

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

   The Export Job Management page opens.

2. Click **Edit Deletion Job**.

   The Delete Exports Job Management page opens.

3. Complete the fields.

4. Click **Save**.

Import Job Management

The Import Job Management function includes options to add, configure, test, enable or disable, and schedule import jobs. The following types of imports are available from the Import Type drop-down list:

- Core Import Organization Role
- Core Import Leave Balance Expirations
- Core Import User Role Assignments
- Core Import User Organization Assignment

- Core Import Account Field
- Core Import Work Schedules
- Core Import Leave Balances
- Core Import Labor Distribution Activities
- Core Import Organization Tree
- Core Import Account
- Core Import Shifts
- Core Import Case Tracking Cases
- Core Import Labor Distribution Activity Sets
- Core Import Account Assignment

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

The Import Job page is shown below.

Import Job page contents

The Job Import page contains these fields:

- **Name**. The name of the import job.
- **Import Type**. The type of import that will be run, for example, "USG Import BLI Table."
- **Payroll Provider**. If multiple payroll providers are defined in the system, select the one you want to use.
- **Disabled**. Whether the job is enabled or disabled.
- **Protocol**. Determines how to read the import file.
    - **Local file**. Reads the import file from the server's local file system.
    - **FTP**. Reads the import file via File Transfer Protocol (FTP).
    - **SFTP**. Reads the import file via Secure File Transfer Protocol (SFTP).
- **Directory**. If the protocol "Local file" is selected, this is the directory of the webTA server. If the protocol "FTP" or "SFTP" is selected, this is the remote directory on those respective services.
- **Filename Pattern**. Determines the filename pattern to match when looking for import files. For example, if you specified the filename pattern `my_file_{CURRENT_DATE}.txt` then the resulting filename would, for example, be `my_file_20150220.txt`. Optionally, use the following variables to the filename as demonstrated in the example:

    `CURRENT_DATE`. The current date in YYYYMMDD format.

    `CURRENT_TIME`. The current time in HHMMSS format.

    `DIRECTORY`. The directory specified.

    `REMOTE_HOST`. The host name specified.

    `REMOTE_USER`. The user specified.

    `REMOTE_PASS`. The password specified.

    `PP`. The current pay period number.

    `YYYY`. The current pay period year.
- **Pre-Process File Command**. Specify a system call to run on the file before it is processed. The output from the system call will be the data read by the import process.
- **Post Process Destination Directory**. The directory into which the import file will be moved after it has been processed.
- **Hostname**. If the protocol is FTP or SFTP, type the hostname.
- **User**. If the protocol is FTP or SFTP, type the username for authentication.
- **Password**. If the protocol is FTP or SFTP, type the password for authentication.
- **# Retries**. Number of retries to attempt when failures occur.
- **Retry Delay (secs)**. Number of seconds between retries.
- **Execute Multithread**. Indicates whether the job should be run multi-threaded.
- **User Data File**. The data file is located on the local PC. (**NOTE**: Click **Run Import Now With User Data File** if you select this option.)
- **Edit Schedule**. Set up a schedule that determines when the jobs will run.

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

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

About the Create Test Record option

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

About the Edit Deletion Job option

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

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

Adding or modifying import jobs

To add or modify import jobs, take these steps:

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

   The Import Job Management page opens.

2. Click **Add New**.

   −OR−

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

   The Import Job page opens.

3. Complete the fields.

4. Click **Save**. A message confirms that the job and/or updates were saved.

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

Enabling or disabling import jobs

To enable or disable import jobs, take these steps:

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

   The Import Job Management page opens.

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

   The Import Job page opens.

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

   −OR−

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

4. Click **Save**. A message confirms that the update was saved.

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

Scheduling import jobs to run

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

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

   The Import Job Management page opens.

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

   The Import Job page opens.

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

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

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

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

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

   The Import Job Management page opens.

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

   The Import Job page opens.

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

4. Click **Save**. A message confirms that the update was saved.

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

Deleting import jobs

To delete an import job, take these steps:

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

   The Import Job Management page opens.

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

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

Creating or parsing test records

To create or parse test records, take these steps:

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

   The Import Job Management page opens.

2. Click **Create Test Record**.

   The Create Test Import Record page opens.

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

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

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

    −OR−

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

Working with the Edit Deletion Job option

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

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

    The Import Job Management page opens.

2. Click **Edit Deletion Job**.

    The Delete Imports Job Management page opens.

3. Complete the fields.

4. Click **Save**.

Jobs Management

Jobs are background server processes that include these characteristics:

*   In a multi-server environment, job processes run on only one server at a time.
*   In a multi-server environment, a job process may run on any server.
*   Job processes run without user intervention.

Jobs listed on the Job Management page include core system processes (for example, the Audit Deletion job), add-on module processes (for example, Emergency Contact Expiration Notification Job), import jobs created with the Import Job Management function, and export jobs created with the Export Job Management function.

Use the Job Management function to enable or disable jobs, export job details, execute a job immediately or monitor job processes. The Job Management page is shown below:

Job Management

Name	Last Finish Date	Next Start Date	Enabled
3x Migration Job	2015-Jul-29 12:58 PM	9999-Jan-01 12:00 AM	Yes
Archive Copy Job			No
Archive Deletion Job		9999-Jan-01 12:00 AM	No
Archive Leave Requests	2015-Sep-21 03:00 AM	2015-Sep-22 03:00 AM	Yes
Archive Premium Pay Requests	2015-Sep-21 03:00 AM	2015-Sep-22 03:00 AM	Yes
Audit Deletion Job	2015-Sep-19 11:00 PM	2015-Sep-26 11:00 PM	Yes
Auto-PreProcess Timesheets for com.kronos.federal.nfc.payroll.NfcPayrollProvider	2015-Sep-21 01:49 PM	2015-Sep-21 01:52 PM	Yes
Build File Transfer [com.kronos.federal.nfc.payroll.NfcPayrollProvider]	2015-Sep-21 01:45 PM	2015-Sep-21 01:50 PM	Yes
Build File Transfer [com.kronos.payroll.DefaultPayrollProvider]			No
Build for com.kronos.federal.nfc.payroll.NfcPayrollProvider	2015-Sep-21 09:06 AM	9999-Jan-01 12:00 AM	Yes
Calendar Status Change Notification		2015-Jul-29 12:48 PM	No

1-25 of 51 Records |◄ ◄ 1 2 3 ► ►| View 25 50 100

Name: **Enabled:** All ▼ Search Clear

Jobs

Cancel

Enabling or disabling jobs

To enable or disable a job, take these steps:

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

   The Job Management page opens.

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

   Job details are displayed near the bottom of the page.

3. Click **Enable** near the bottom of the page.

   –OR–

   Click **Disable** near the bottom of the page.

   A message confirms that the update was saved.

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

Exporting jobs

To export job details, take these steps:

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

   The Job Management page opens.

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

   Job details are displayed near the bottom of the page.

3. Click **Export Job** near the bottom of the page.

   The File Download dialog opens.

4. Click **Open** to view the data in a .csv formatted file. Close the file when you are done.

   –OR–

Click **Save** to save the file. The Save As dialog opens. Click **OK** to save the data in a .csv formatted file.

Monitoring jobs

To monitor jobs, take these steps:

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

   The Job Management page opens.

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

   Job details are displayed near the bottom of the page.

3. Click **Monitor Job** near the bottom of the page.

   The Job Monitoring page opens.

4. Optionally, click **Refresh** to update the data.

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

Scheduling jobs to run immediately

To schedule a job to run right away, take these steps:

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

   The Job Management page opens.

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

   Job details are displayed near the bottom of the page.

3. Click **Schedule Immediate Run** near the bottom of the page.

   A confirmation message appears near the top of the page.

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

LDAP Management

The Lightweight Directory Access Protocol (LDAP) function facilitates efficient and secure logon processes. When a user logs on to webTA in an LDAP environment, the webTA system sends the user ID/password to the LDAP server for authentication. If the LDAP server verifies the user credentials, webTA searches for a corresponding user record in the webTA database. If webTA retrieves the user record, it bypasses internal password authentication. The user is logged directly into the webTA system.

> ***IMPORTANT****! LDAP is an authentication protocol. It does not automatically create users in the webTA database. A user record must be created in webTA for every user who will log on, whether or not LDAP is implemented. User records are typically created by importing data.*

webTA supports two standard LDAP authentication types: Intermediate and Direct.

About intermediate authentication

Use intermediate authentication when an LDAP search or query is required in locating a particular user in the tree. In this scenario, a privileged LDAP user is configured in the LDAP profile. This user acts as an intermediary or proxy, binding to the LDAP source and then searching for the user logging into webTA. Here is an example screenshot with Intermediate Authentication selected:

About Direct authentication

Use direct authentication when the authenticating user must bind directly to the LDAP source. In this scenario, a user logging into webTA must bind directly to the LDAP source. Here is an example screenshot with Direct Authentication selected.

The LDAP Management page contains these fields:

- **Name**. The name of the LDAP setup.

- **Authentication Type**. Select Direct or Intermediate as the authentication type, as described above. You cannot change the authentication type after saving the profile.

- **URL**. Specify the URL to connect to the LDAP source, for example, ldap://{ldaphost.gov}:389 or ldaps://{ldaphost.gov}:636.

- **Primary**. If more than one LDAP profile is defined, you can enable the check box to identify which profile should be authenticated first.

- **Database Failover**. If a user is unable to authenticate with the LDAP, you can enable the check box to automatically attempt to authenticate the user via the database.

- **Query**. Enter an LDAP query for the profile. If you enter the substitution parameter $USERNAME, it will be replaced in the query with the user who is attempting authentication. For example, `(sAMAccountName=$USERNAME)` or `CN=$USERNAME,CN=users,DC=ldapdev,DC=kronosdev,DC=com`

- **LDAP Environment Properties**. The following properties are applicable to both authentication types:

  - **java.naming.factory.initial**. This property is required but you can change the value. The default context **factory** is normally sufficient for most installations.

  - **java.naming.referral**. There are three primary referral settings: Ignore, Follow and Throw. The default **Follow** is normally sufficient for most installations.

  - **java.naming.security.authentication**. There are three primary authentication settings: None, Simple and Strong. The default is **Simple**, resulting in the use of clear-text passwords during authentication with the LDAP source. Most LDAP sources support stronger forms of encrypted credentials and in these cases, you can use a setting such as DIGEST-MD5 or another cipher type.

The following properties apply only to the Intermediate authentication type.

- **java.naming.security.principal** This property is required but its value can be altered. This is the user who binds to the LDAP source in order to execute an LDAP query for locating the authenticating webTA user. The principal is normally an 'administrator' or privileged user having

the ability to search various areas of the LDAP tree given an LDAP query. Example Principal: CN=wasadmin,CN=Users,DC=ldapdev,DC=kronosdev,DC=com

- **java.naming.security.credentials** This property is required but its value can be altered. This is the principal's credentials to authenticate with the LDAP source. This may be a simple clear-text password, certificate or key but depends on the value of java.naming.security.authentication.

- **ldap.search.base**. This is a webTA LDAP environment property that tells the LDAP source where to begin searching when executing the LDAP query. Example: `CN=Users,DC=ldapdev,DC=kronosdev,DC=com`

- **ldap.search.subtree**. This is a webTA LDAP environment property that tells the LDAP source whether to search the sub-tree from the search base. Only true or false may be specified for this property. When `true` the entire sub tree is searched starting from the base. When `false` a single level of the sub tree is searched.

To specify custom LDAP properties, click **Add New** under the LDAP Environment Properties table.

Adding and editing LDAP profiles

To add or edit LDAP profiles, take these steps:

1. Click **LDAP Management** on the Administrator main menu.

   The LDAP Management page opens.

2. Click **Add LDAP Configuration** to configure a new LDAP profile.

   −OR−

   Click the **LDAP name link** to open an existing LDAP profile.

   The LDAP Management page opens.

3. Complete the fields.

4. To add new LDAP environment properties, click **Add New** under the LDAP Environment Properties table.

   A new row is inserted in the table. Type the property name and corresponding value in the new row.

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

Validating LDAP profiles

After an LDAP profile is configured and saved, it must be validated in order to participate in webTA's authentication cycle. Ensure that your LDAP environment is online and accessible, and then take these steps:

1. Click **LDAP Management** on the Administrator main menu.

   The LDAP Management page opens.

2. Click **Validate LDAP** on the row that identifies the profile you want to validate.

   A message confirms the validation or alerts you to errors.

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

License Management

The License Management function supports the import of license files and the assigning licenses to users. Depending on which roles and permissions users need, different licenses may be required. For example, if an employee needs to view or submit a timesheet, the webTA license must be assigned to the user. In addition, if the same employee needs to access the Continuation of Pay (COP) module, the WEBTA Continuation of Pay license must be assigned to the user.

The Administrator may import license files (or enter a text string), assign licenses to users, or remove licenses from users. The License Management page is shown below.

To import license files, take these steps:

1. Click **License Management** on the Administrator main menu.

   The License Management page opens.

2. Click **Browse** and then select the license file to import.

3. Click **Import License**. The total number of licenses that have been imported into the system is listed in the Total column. The number of available licenses is listed in the unused column.

   –OR–

   Copy and paste the license text into the License String field.

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

Login Banner

Use the Login Banner function to set up text that appears on the webTA login page under the User Name and Password fields. Text may include up to 4,000 characters.

Working with the login banner

To add or modify login banner text, take these steps:

1. Click **Login Banner** on the Administrator main menu.

   The Login Banner page opens.

2. To add or modify banner text, click the cursor in the Login Banner box and type the new text.

3. To format the text, use Hypertext Markup Language commands (HTML.) For example, to format bold text, use the HTML bold formatting commands **** and ****.

4. Click **Preview**. The modified text appears under Login Banner Preview.

5. Click **Save**. A message confirms that the updates were saved.

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

Message Management

Use this feature to enable or disable messages that the system sends to users upon completion of system functions. Example messages include "Leave Request Approved," and "Timesheet Requires Validation." System messages such as "Job Failure" or "Import Job Succeeded" alert administrators about the success or failure of system tasks.

Message Management

Default Delivery:

- ○ webTA Inbox
- ○ E-Mail System
- ● Both webTA Inbox and E-Mail System
- ○ Neither webTA Inbox nor E-Mail System

Message Expiration:

Enabled: ☑

Remove Messages After: 30 Days

User Message

User Messages

Delivery	Subject	Text
Default Delivery ▼	Export Job Failed	#{JOB_NAME} Export Job Failed Filename: #{FILENAME} Execution time: #{ELAPSED} Exception: #{EXCEPTION} #{MessageLink.to(msg.userMessageDetail, '/resources/messages/doc/MessageGeneralTransferFailed.doc')}
Default Delivery ▼	File Transfer Failed	Provider: #{PROVIDER} ExportId: #{EXPORT_ID} Exception: #{EXCEPTION}
Default Delivery ▼	has added you as an Intermediate Approver to a Leave Request	#{USER_NAME} has added you as an Intermediate Approver to a leave request for #{TOTAL_HOURS} hours starting on #{START_DATE}.

1-25 of 156 Records |◀ ◀ 1 2 3 4 5 6 7 ▶ ▶| View 25 50 100

[Save] [Cancel]

To manage user messages, take these steps:

1. Click **Message Management** on the Administrator main menu.

   The page opens. The User Messages table lists the subject and accompanying text for each message.

2. Click a check box to enable a message.

   –OR–

   Clear a check box to disable a message.

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

Organization Management

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

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

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

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

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

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

Organization Management: DOC

Organization:

[   ] Search   Clear

Root > DOC

Name	Description	Status	Action
BEA		Active	
BIS		Active	
CENS		Active	
EDA		Active	
ESA		Active	
GCERC	GCERC	Active	
ITA		Active	
MBDA		Active	
NIST		Active	
NOAA		Active	
NTIA		Active	
NTIS		Active	
OIG		Active	
OS		Active	
TA		Active	

1-15 of 15 Records |◄ ◄ 1 ► ►| View 25 50 100

Name: DOC
Description: [DOC]
Active: ☑

[   ] Add New Sub-Org

Manage Members   Export All

Save   Cancel

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

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

The following screenshot shows an example sub-organization.

Organization Management: BEA

Organization:

[   ] Search   Clear

Root > DOC > BEA

Name	Description	Status	Action
No results			

Name: BEA
Description: [   ]
Active: ☑

[   ] Add New Sub-Org

Manage Members   Export All

Save   Cancel

Working with organizations

Viewing organizations and sub-organizations

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

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

   The Organization Management page opens.

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

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

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

   −OR−

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

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

   −OR−

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

Adding organizations

To add a new organization, take these steps:

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

   The Organization Management page opens.

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

   The organization is added to the table.

3. Continue adding organizations.

   −OR−

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

Deleting organizations

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

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

   The Organization Management page opens.

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

   −OR−

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

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

Adding sub-organizations

To add an organization, take these steps:

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

   The Organization Management page opens.

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

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

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

   The sub-organization is added to the table.

4. Continue adding sub-organizations.

   −OR−

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

Deleting sub-organizations

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

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

   The Organization Management page opens.

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

   The sub-organization table opens.

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

   −OR−

   If the Delete option is not available, delete or move sub-organizations, user members, or organization roles until the Delete option appears and then repeat this step

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

Moving sub-organizations

The Move Org option is available only if the organization has at least three levels (a parent and at least two sub-organizations.) The example screenshot below shows the Move Org option for DOC > NOAA > AGO.

To move sub-organizations, take these steps:

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

   The Organization Management page opens.

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

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

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

4. Click **Move Org**.

   The Organization Management - Select a new Parent for ... page opens.

5. Click **Select** on the row that identifies the parent organization to which you want to move the selected sub-organization.

   A confirmation message appears.

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

   −OR−

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

7. Click **Root** to go back to the Organization Management page.

Adding and deleting organization members

To add members to an organization, take these steps:

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

   The Organization Management page opens.

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

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

3. Click **Manage Members**.

   The Manage Members Of ... page opens.

Manage Members of BEA	
Organization Member Name	
Blake, John	X
Davis, Bunny	X
Fryman, Christy	X
Greene, Peter	X
Gruen, Trevor	X
Hall, Ethan	X
Johnson, Mark	X
Maynard, Doris	X
Perez, Sonia	X
Richie, Betty	X
Smith, Kay	X
White, Jay	X
Wood, Rob	X

   1-13 of 13 Records |◄ ◄ 1 ► ►| View 25 50 100

   Add User

   Cancel

4. Click **Add User**.

   The Select User page opens.

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

   A message confirms that each user was added.

6. When you have finished adding users, click **Cancel**, and then click **Root** to return to the Organization Management page.
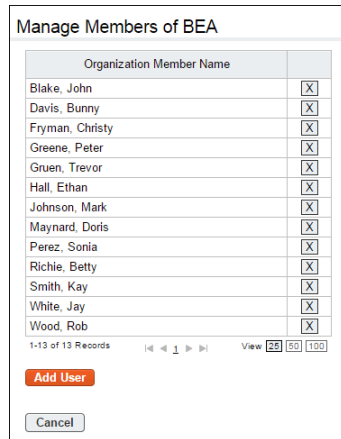
To remove members from an organization, take these steps:

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

   The Organization Management page opens.

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

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

3. Click **Manage Members**.

   The Manage Members Of ... page opens.

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

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

Exporting organizations

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

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

   The Organization Management page opens.

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

3. Click **Export All**.

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

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

Password Message

The Administrator may set up a message that appears when users change their webTA password. The message may, for example, remind users to adhere to proper security guidelines when they create the new password.

The message displays on the Change Password page, which displays under these conditions:

- The Administrator or another authorized user changes the user's password on the Employee Profile > Settings page. The next time the employee logs on, the system prompts them to change their password.

- If the Password Expiration Check Rule in the Authentication Validation Rule Set is enabled, the system prompts users to change their password when the rule is triggered.

The Password Message page is shown below.

To add or modify the password message text, take these steps:

1. Click **Password Message** from the System Set Up section on the Administrator main menu.

   The Password Message page opens.

2. To add or modify text, click the cursor in the Message field and type the new text.

3. To format the text, use Hypertext Markup Language commands (HTML). For example, to format bold text, use the HTML bold formatting commands and .

4. Click **Preview**. The modified text appears under Password Message Preview.

5. Click **Save**. A message confirms that the update was successful.

   –OR–

   Click **Cancel** to go back to the previous page without saving changes.

To delete password message text, take these steps:

1. Click **Password Message** from the System Set Up section on the Administrator main menu.

   The Password Message page opens.

2. Click **Delete**.

   A message confirms that the text was deleted.

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

Pay Period Management

Use the Pay Period Management function to restrict user access to timesheets, schedules and leave balances. The Pay Period Management page is shown below.

Pay Period Management page contents

- **Corrected Timesheets**
  - **Regular Corrections**. Starting from the current pay period, the number of past pay periods in which users may create regular corrections.
  - **Prior Corrections.** Starting from the current pay period, the number of past pay periods in which users may create prior corrections.
  - **Local Corrections**. Starting from the current pay period, the number of past pay periods in which users may create local corrections.

- **Past Timesheets, Schedules, Leave Balances**
  - **Past Pay Periods**. Starting from the current pay period, the number of past pay periods for which users may view historical timesheets, schedules, and leave balances.

Configuring pay period management

To set pay period restrictions, take these steps:

1. Click **Pay Period Management** on the main menu.

   The Pay Period Management page opens.

2. Specify the number of pay periods for one or more fields.

3. Click **Save** to save the updates and then click **Cancel** to return to the main menu.

Rule Management

Rule sets determine whether data that has been entered into the system is valid based on criteria specified in the rule. The Administrator may modify rule set criteria to enforce specific agency and/or payroll provider guidelines.

The following rule sets are available:

- **Authentication Validation**. Determines whether a given authentication attempt is valid.
- **Password Validation**. Determines whether a password that has been entered into the system is valid according to specific rules.
- **Pay Provider Validation**. Determines pay rules that validate timesheet data and, if invalid, displays an error or warning.
- **Work Schedule Input Validation**. These rules validate work schedule data entered by users.

An example Rule Management page is shown below. The selected rule name is "Base 80 Biweekly Hours."

Rule Management

Items marked with an asterisk* are required.

Name:	Base 80 Biweekly Hours
Id:	PPV_NFC_100
Implementation Class:	com.kronos.federal.nfc.rules.payprovidervalidations.NfcTimeInPayHoursPPVRule
Description:	Ensures the timesheet hours match the pay period duty hours. Does not run unless status change type is NONE.

Message:

Base 80 hours (#{timeInPay}) does not match duty hours (#{dutyHours})

Enabled: Yes ▼

* Validation Type (ERROR or WARNING): ERROR

Available Control Logic

Exclude Full Time Employees
Exclude Intermittent Employees
Exclude Negative Annual Leave Flagged Employees
Exclude Negative Religious Comp Leave Flagged Employees
Exclude Negative Sick Leave Flagged Employees
Exclude Part Time Employees

Add ▶
◀ **Remove**

Assigned Control Logic

[Save] [Restore Message] [Cancel]

Rule Management page contents

> **NOTE**: *Depending on the rule, the fields on the Rule Management page vary.*

- **Name**. The name of the rule. This field is read-only.
- **ID**. The unique ID that is assigned to the rule, for example, PPV_NFC_101. This field is read-only. Each ID begins with one of the following prefixes:
    - **AV** = Authentication Validation
    - **PV** = Password Validation
    - **PPV** = Pay Provider Validation
    - **WSIV** = Work Schedule Input Validation
- **Implementation Class**. The category that the rule is assigned to. This field is read-only.
- **Description**. The description of the rule. This field is read-only.
- **Message**. The text of the message that the system displays when the rule is triggered.

  > **NOTE**: *With the exception of rules available in the Pay Provider Validation rule set, the message text cannot be modified. The Administrator may create and modify message text for all pay provider validation rules and indicate whether the outcome of the message is an ERROR or WARNING when the rule is triggered.*

- **Enabled**. Whether the rule is enabled or disabled
- **Allow Blank Schedule**. Whether the rule allows a blank (empty) work schedule.
- **Validation Type (ERROR or WARNING)**. Specify whether the rule produces an ERROR message type or a WARNING message type.

  > **NOTE**: *Timesheets that contain ERROR messages cannot be certified until the message is resolved or validation is overridden by the Master Supervisor. Timesheets that contain WARNING messages may be certified and processed for payroll.*

- **Control Logic**. Assign or remove rule control logic items. A rule control logic item determines the outcome of the application of the validation rule. For example, if the control logic item "Exclude Full Time Employees" is assigned to a Pay Provider Validation rule, then the rule does not validate timesheets for full time employees. Three control logic items are available:
    - Exclude Full Time Employees
    - Exclude Part Time Employees
    - Exclude Intermittent Employees

About authentication validation rules

The Authentication Validation rule set determines whether a given authentication attempt is valid. The following authentication validation rules are available:

- **Number of Failed Logins Rule**. Determines the maximum number of failed login attempts that a user can enter. When the number of attempts is exceeded, the user may be locked out of the system for a specified length of time, or permanently. (Specify -1 to lock the system permanently for the user.)
- **Password Expiration Check Rule**. Determines the number of days in which a user's password expires and how many days in advance to send a notification message. (Specify -1 to disable notification.)

To work with an authentication validation rule, click the **rule name link**. Please see *Rule Management page contents* above for descriptions of each field.

About password validation rules

The Password Validation rule set determines whether a password that has been entered into the system is valid according to specific rules. For example, the Dictionary Words rule determines whether the password must include alphabetical and/or numeric characters, upper and/or lower case letters, special characters, etc. The following password rules are available:

- •**Dictionary Words**. Determines whether the password must include certain types of alphanumeric characters, whether the password must be a non-word, and whether it should include upper and lower case letters or special characters.
- •**Minimum Length**. Determines the minimum length of the password, for example, 8 characters.
- •**Minimum Password Age**. Determines how often a password must be changed.
- •**Non User ID**. Determines whether the password can contain any part of the employee's user ID.
- •**Reuse of Passwords**. Determines whether the password can be reused and, if so, when.

To work with a password validation rule, click the rule name link. Please see *Rule Management page contents* above for descriptions of each field.

About pay provider validation rules

The Pay Provider Validation rule set determines pay rules that validate timesheet data. The Administrator may specify whether the validation check produces an error message or a warning message if the data is invalid.

To work with a pay provider validation rule, click the **rule name link**. Please see *Rule Management page contents* above for descriptions of each field.

About work schedule input validation rules

The Work Schedule Input Validation rule set validates work schedules submitted by users. For example, an agency may require that work schedule hours must be the same as the duty hours. The following work schedule input validation rules are available.

- **Fixed Work Schedule Rule**. Validates that the work schedule has the same start and stop time times for each day.
- **Work Schedule Bands Required Rule**. Validates that the work schedule has at least one band of time.
- **Work Schedule Hours Must Match Duty Hours**. Validates that the total work schedule hours equals the total duty hours.

To work with a work schedule input validation rule, click the **rule name link**. Please see *Rule Management page contents* above for descriptions of each field.

Configuring rule sets

To configure a rule set, take these steps:

1. Click **Rule Management** on the Administrator main menu.

   The Rule Management page opens with a table of rule sets.

2. Click the **rule set link** that you want to work with.

   The rules available in the rule set are listed on the page.

3. Click the **rule link** that you want to work with.

   The rule opens.

4. Make changes.

5. Click **Save** to save your changes and then click **Cancel** to go back to the previous page.

   –OR–

   Click **Restore Message** to revert the current message text to the original message text.

   –OR–

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

Script Execution

The Administrator may use the Script Execution function to run automated tasks such as loading data and modifying settings. There are two types of scripts: registered scripts and external scripts. The Script Execution page is shown below with a sample registered script:

To work with scripts, take these steps:

1. Click **Script Execution** on the Administrator main menu.

   The Script Execution page opens:

2. To work with registered scripts, use these options

    To quickly view a registered script, select the script from the Registered Scripts drop-down list, and then click **Select**. The script command lines are displayed in the Current Script box.

    –OR–

    To view and run a registered script, select the script from the Registered Scripts drop-down list, and then click **Select and Execute**. The script command lines are displayed in the Current Script box and the script runs.

    –OR–

    To run the script that is displayed in the Current Script box, click **Execute Current Script** near the bottom of the page.

    –OR–

    To run the script using background processing, click **Execute in Background** near the bottom of the page.

3. To run an external script, click **Browse** next to the External Script File field. The Choose File dialog opens. Locate the file and click **Open**. To run the script, click **Load** next to the External Script File field. The system loads and runs the script in the Current Script text box.

4. If the script requires a data file for input, two options are available.

    - **Target Data File**. Use this option if the data file resides on your PC. Click **Browse** next to the Target Data File field. The Choose File dialog opens. Locate the file and click **Open**.

    - **Local Data File Name**. Use this option if the data file resides on the webTA server. Type the exact path location in the Local Data File Name field. For example, type `c:\mydata\data.txt` for Microsoft Windows, or type `/mydata/data.txt` for UNIX.

5. When you are ready to run the script, click **Execute Current Script**.

    –OR–

    Click **Execute in Background**.

6. When you are finished, click **Cancel** to go back to the main menu.

Send System Wide Messaging

Administrators may use the Send System Wide Message function to create and send messages to all users. Optionally, the Administrator may flag the message with "High Importance" in the Subject line.

Users who are logged on to the system see the message displayed near the top of the page.

Take these steps to create and send a system wide message:

1. Click **Send System Wide Message** on the Administrator main menu.

   The Send System Wide Message page opens. By default, the Recipients field displays "All Users."

2. Type a message subject, click the cursor in the Body field, and type the message.

3. Optionally, click the **High Importance** link to enable or disable the High Importance icon. (The icon becomes bold when enabled and dims when disabled.)

4. Click **Send Message**.

   A confirmation appears.

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

Server Management

The Administrator may use the Server Management function to edit the server name, view the UUID, server IP address and server port. Click **Server Status** to view memory and load details displayed in the Server Status table. The Server Management page is shown below.

To work with server management, take these steps:

1. Click **Server Management** on the Administrator main menu.

   The Server Management page opens.

2. Change the server name.

   –OR–

   Click **Show Server Status** to view the Server Status table.

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

Session Management

Use Session Management to manage the behavior of user sessions and timeouts due to inactivity. The Administrator may perform the following tasks with this function:

- Specify the session timeout.
- Prevent the same user from logging on to the system more than once during the same session.

- Enable a timeout warning.
- Specify custom URLs that display after a timeout occurs, or after a user logs off the system.

Session Management

Session Timeout (in minutes):	30
No Timeout:	☐
Prevent Duplicate Logins:	☐
Show Timeout Warning:	☐
Minutes before Timeout Warning:	1440
Timeout Redirect URL:	
Logout Redirect URL:	

Save   Cancel

Specifying the session timeout

To specify the session timeout, take these steps:

1. Click **Session Management** on the Administrator main menu.

   The Session Management page opens.

2. Type a value in the **Session Timeout** field. The value represents minutes and the maximum number of minutes is 1440 (one day.)

   *NOTE: The **No Timeout** check box must be cleared before you can type a value in this field.*

   −OR−

   Check the **No Timeout** check box to disable the timeout.

3. Optionally, change **Minutes before Timeout Warning** to determine when a warning message appears to the user before a session times out. For example, if the value is 2, the following warning message appears two minutes before the session automatically times out: "Your session will expire in 2 minutes. Do you want to continue working?"

4. Click **Test Timeout Warning** to test the warning message.

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

Preventing duplicate logins

To prevent duplicate logins, take these steps:

1. Click **Session Management** on the Administrator main menu.

   The Session Management page opens.

2. Check the **Prevent Duplicate Logins** check box.

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

Specifying session timeout warnings

By default, the following warning pop-up message appears two minutes before a session times out: "Your session will expire in 2 minutes. Do you want to continue working?"

To enable or disable the session timeout warning, or to specify how many minutes the warning is displayed before the timeout, take these steps:

1. Click **Session Management** on the Administrator main menu.

   The Session Management page opens.

2. Check the **Show Timeout Warning** check box to enable the warning. The check box is enabled by default. Type the number of minutes in the **Minutes before Timeout Warning** field. The default is 2 minutes.

   −OR−

   Clear the **Show Timeout Warning** check box to cancel the warning.

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

Specifying custom URLs

Administrators may specify custom URLs that the system displays after a session times out or after a user logs off the system. To specify the Timeout or Logout URL, take these steps:

1. Click **Session Management** on the Administrator main menu.

   The Session Management page opens.

2. Optionally, type a well-formed URL in the **Timeout Redirect URL** to specify a URL that displays after a session timeout. The URL supports redirection to an agency home page or another internal resource, for example, http://www.first.gov/ or it may be relative to webTA, such as /Home.

3. Optionally, type a well-formed URL in the **Logout Redirect URL** to specify a URL that displays after a user logs off the system. The URL supports redirection to an agency home page or another internal resource, for example, http://www.first.gov/ or it may be relative to webTA, such as /Home.

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

Single Sign-On Management

Use this option to allow single sign on authentication using either an HTTP header value or HTTP remote user schemes.

Single Sign On Management page contents

The page includes these fields:

- **Single Sign-on Enabled**. If enabled, webTA uses single sign on.

- **Use HTTP Request Remote User**. If enabled, webTA uses the HttpServletRequest.getRemoteUser() value as the User ID.

- **Alternate HTTP Header Key**. If enabled, webTA will find the HTTP header with the same name and then use the value of that header as the User ID.

- **User ID Expression**. Use this option if your organization has custom authentication objects that can be referenced via the HttpServletRequest. Entering a value here means that webTA will use that expression to obtain the User ID. The HttpServletRequest object can be referenced by the variable name "request". For example, to replicate specifying "Use HTTP Request Remote User" as a User ID Expression, the expression is as follows:

```
#{request.getRemoteUser()}
```

To replicate specifying an Alternate HTTP Header Key of my_sso_id, the expression is as follows:

```
#{request.getHeader("my_sso_id")}
```

webTA 4.2 and SSO Data Flow

All webTA 4.2 methods work by extracting USERID information that is injected into the HTTP headers or HTTP session by a third-party SSO product of the organization's choice. The flow is described below:

- The user makes a request on their desktop browser to http://webta.org.gov/webta.

- First, the information is routed to a server running the third-party SSO software, which checks to see if the user is currently SSO-authenticated.

- If the user is not SSO-authenticated, the SSO server responds to the browser request with a third-party SSO login page from which the user may obtain SSO-authentication.

- Once the user is SSO-authenticated by the third-party SSO product, the third-party SSO software will inject the user's USERID information into the HTTP header or session and forward the altered HTTP request to the webTA server. (HTTP session alteration can be performed by SSO products that plug directly into the Tomcat application server.)

- webTA 4.x can be configured to read the USERID information and automatically log in the user based on the USERID. In this case, webTA does not perform any authentication.

  NOTE: The injected USERID data should match the USERID a user would normally use to log in to webTA. If there is no easy way to reconcile this, Kronos can provide customization to translate the unique employee identifier into the webTA USERID.

  For example, let's say the third-party SSO authenticator only has access to a 12-digit employee ID that is unique to every employee but they don't want the employee to use the ID as the webTA user ID. The employee ID could be populated into webTA's "Employee ID" field and then customized so that when SSO is enabled in webTA, the system will first read the employee ID from the HTTP header or session and then find the webTA user with the matching employee ID and log in that user.

Configuring single sign on

To configure single sign on, take these steps:

1. Click **Single Sign On Management** on the Administrator main menu.

   The Single Sign On Management page opens.

2. Click **the Single Sign On Enabled** check box.

3. Click the **Use HTTP Request Remove User** check box.

   –OR–

   Type an HTTP header value in the **Alternate HTTP Header Key** field.

   –OR–

   Enter a value in the **User ID Expression** field.

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

Transaction Code Management

The Transaction Code Management function allows Administrators to edit transaction codes, specify the order in which transaction codes appear in drop-down lists, and specify how transaction code names and corresponding descriptions display on application pages.

Phased Retirement Transaction Codes

To satisfy OPM guidelines for Phased Retirement, a new tour of duty, 35 transaction codes, and relevant exceptions and restrictions are available in webTA. The new transactions codes are restricted for use with the new tour of duty (NFC TOUR OF DUTY for PT PHASED RETIREMENT). The Administrator may view or adjust this association on the Transaction Details page under the NFC Tour of Duty table in the Transaction Code Editor. Employees are assigned the Phased Retirement tour of duty in the Timesheet Profile.

The Transaction Code Management page is shown below.

About the Edit Codes option

Use the Edit Codes option to adjust transaction codes, including the name, description, whether the code is enabled, whether the code is valid, and whether the code displays in drop-down lists or in request forms.

Codes may be enabled as valid for these areas of the application:

- Agency. For example, 01-Base Pay Detail may be valid for Agency A, B, and E, but invalid for Agency C and D.
- Payplan. For example, 01-Base Pay Detail may be valid for GS (General Schedule) but invalid for FP (Foreign Service Personnel.)
- Tour of Duty. For example, 01-Base Pay Detail may be valid for Full Time but invalid for Intermittent.
- Alt. Schedule. For example, 01-Base Pay Detail may be valid for Regular 8-hour Days but invalid for Variable Workweek.

- Included Organizations. For example, 01-Base Pay Detail may be available for use by all or some organizations.
- Excluded Organizations. For example, 01-Base Pay Detail may be unavailable for use by some organizations.

Codes may be included on these forms or drop-down lists:

- Leave Request Form. For example, 01-Base Pay Detail may be invalid for use on leave requests.
- Premium Pay Request Form. For example, 01-Base Pay Detail may be invalid for use on premium pay requests.
- Timesheet Groups. Timesheet groups include Dollar Transactions, Leave Time Transactions, and Work Time Transactions. For example, 01-Base Pay Detail may be valid for work time transactions, but invalid for Dollar Transactions and Leave Time Transactions.
- Request Groups. For example, 01-Base Pay Detail may be unavailable for use with the Telework Request group.
- Telework. The code is a telework code. The code displays for employees with valid telework agreements.

A sample screenshot of the Transaction Details page is shown below. (For space, the screenshot is edited and truncated.)

Transaction Details

Items marked with an asterisk* are required.

NFC TCode: 01

NFC Subcode: 14

NFC Prefix:

NFC Suffix:

Name: 01 - Telework Home

* Description: Telework Home - Routine

Enabled: ☑

NFC Agency

NFC Agency	Valid
BEA	☑
BIS	☑
CENS	☑
EDA	☑
ESA	☑
GCERC	☑
ITA	☑
MBDA	☑
NIST	☑
NOAA	☑
NTIA	☑
NTIS	☑
OIG	☑
OS	☑
TA	☑

Request Groups

Group	Include
Present on Telework Request Page	☑

Telework

Group	Include
Is Routine Telework Code	☑
Is Situational Telework Code	☐
Only show for employee with valid agreements	☑

[Save] [Cancel]

Transaction Details page contents

- **NFC TCode**. The two-digit numeric transaction code, for example, *01*.
- **NFC Subcode**. The two-digit numeric transaction sub-code, for example, *14*.
- **NFC Prefix**. The prefix portion of the transaction code. This only applies to some codes.
- **NFC Suffix**. The suffix portion of the transaction code. This only applies to some codes.
- **Name**. The name of the transaction code, for example, *01 – Telework Home*.
- **Description**. A description of the transaction code, for example, *Telework Home - Routine*.
- **Enabled**. Whether the transaction code is enabled.
- **NFC Agency**. The transaction code is valid for specific agencies, such as *NIST*.

- **NFC Payplan**. The transaction code is valid for specific pay plans, such as *BEA*.
- **NFC Tour of Duty**. The transaction code is valid for specific tours of duty, such as *Phased Retirement*.
- **NFC Alt. Sched**. The transaction code is valid for specific alternative work schedules, for example, *4 Ten-hour Days*.
- **Included Organization**. The transaction code is valid for all organizations or for specific organizations. Click **Add Organizations** to select specific organizations or sub-organizations.
- **Excluded Organization**. The transaction code is invalid for all organizations or for specific organizations. Click **Add Organizations** to select specific organizations or sub-organizations that will be excluded.
- **Include on Leave Request Form as**. The transaction code is included as a selection on the Leave Request form.
- **Include on Premium Pay Request Form as**. The transaction code is included as a selection on the Premium Pay Request form.
- **Timesheet Groups**
  - **Mile Transactions**. The transaction code is available to use for mileage transactions on timesheets.
  - **Dollar Transactions**. The transaction code is available to use for dollar transactions on timesheets.
  - **Leave Time Transactions**. The transaction code is available to use for leave time transactions on timesheets.
  - **Work Time Transactions**. The transaction code is available to use for work time transactions on timesheets.
- **Request Groups**
  - **Present on Telework Request Page**. The transaction code is included as a selection on the Telework Request page.
- **Telework**
  - **Is Routine Telework Code**. The transaction code is included as a selection for routine telework transactions.
  - **Is Situational Telework Code**. The transaction code is included as a selection for situational telework transactions.
  - **Only show for employees with valid agreements**. The transaction code is included as a selection for employees with valid telework agreements.

Editing transaction codes

To edit transaction codes, take these steps:

1. Click **Transaction Code Management** on the Administrator main menu.

   The Transaction Code Management page opens.

2. Click **Edit Codes**.

   The Edit Codes page opens.

3. Click the **transaction code link** that you want to edit.

   The Transaction Details page opens.

4. Make changes.

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

Specifying transaction code order options

Use this function to specify the order in which transaction codes appear in drop-down lists on timesheets. The following drop-down list categories are available:

- Federal Transaction Group - Work Time
- Federal Transaction Group - Leave Time
- Federal Transaction Group – Dollar Transactions

An example Order Codes page is shown below.

Order Codes

Category: Federal Transaction Group - Dollar Transaction ▼ [Go]

Display Order	Description	NFC TCode	NFC Subcode	NFC Prefix	NFC Suffix
1	Commuted Subsistence	17			7
2	Emergency Pay/Imprest	89			
3	Incentive Pay	17			4
4	Mass Transit Subsidy	17		10	
5	Meals Deduction	92			
6	Parking Subsidy	17			9
7	Remote Worksite	49			
8	Travel Reimbursement Comm.	17		50	
9	Travel Reimbursement Other	17		50	
10	Travel Reimbursement Per Diem	17		50	
11	Uniforms/Tax Exempt	51			8
12	Uniforms/Taxable	51			1

[Save] [Cancel]

To specify the order in which transaction codes appear in drop-down lists, take these steps:
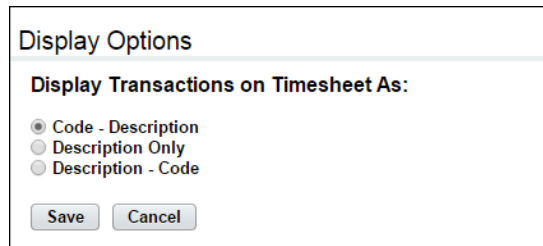
1. Click **Transaction Code Management** on the Administrator main menu.

   The Transaction Code Management page opens.

2. Click **Order Codes**.

   The Order Codes page opens.

3. Select a category from the **Category** drop-down list and then click **Go**.

   The page refreshes with the current display order for transaction codes in the category you selected.

4. Click the cursor in the display order field and type a new display order number.

5. Click **Save**.

   The page refreshes with the updated order.

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

Specifying transaction code display options

Use this function to specify how transaction codes display on timesheets. Three options are available:

- **Code - Description**. Displays the code and an accompanying description, for example, "01 - Regular Base Pay."
- **Description Only**. Displays only the code description, for example, "Regular Base Pay."
- **Description - Code**. Displays the description followed by the code, for example, "Regular Base Pay - 01."

The Display Options page is shown below.

To specify transaction code display options, take these steps:

1. Click **Transaction Code Management** on the Administrator main menu.

   The Transaction Code Management page opens.

2. Click **Display Options**.

   The Display Options page opens.

3. Specify an option and then click **Save**.

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

Reports

The following webTA reports are available to the Administrator:

- Agency Status
- Audit Logs
- Overtime Report
- Role Assignment
- Supervisor Assignments
- Telework by Employee Report
- Telework by Organization Report
- Telework Degree of Participation
- Timekeeper Assignments
- Transmission Listing Report

Agency Status Report

The Agency Status Report lists, by pay period and Timekeeper, the total number of timesheets, and the count of timesheets in each of the following statuses:

- **Pending**. The timesheet has not been validated.
- **Validated**. The timesheet has been validated by the employee and/or the Timekeeper.
- **Certified**. The timesheet has been certified by the Supervisor.
- **Processed**. The timesheet has been processed for payroll.
- **On Hold**. The On Hold flag is enabled in the employee's timesheet profile.

Agency Status

Pay Period	Tkp's Org	Timekeeper	Org	Agency	State	Town	Unit	Tkp	Total	Pending	Validated	Certified	Processed	On Hold
2015-17	BEA	White, Jay	BEA	BEA	AL	1111	11	11	1	0	1	0	0	0
2015-17	BEA	White, Jay	BEA	CENS	AL	1111	11	11	6	6	0	0	0	0
2015-17	BEA	White, Jay	BEA	CENS	DC	0010	01	11	1	1	0	0	0	0
2015-17	BEA	White, Jay	CENS	CENS	AL	1111	11	11	3	3	0	0	0	0

Page 1

Report Parameters

Report Header:

Timekeeper: jwhite [Search]

Organization: BEA [Clear]

Include Sub Orgs: ☑

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

To PP: 2015-17: Aug 23, 15 - Sep 05, 15 ▼

Users: Active ▼

[Reset]

[Run Report] [Cancel]

To generate an Agency Status report, take these steps:

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

    The Reports page opens.

2. Click **Agency Status Report**.

    The page opens:

3. Use the following report parameters:

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

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

    - Accept the organization.

        −OR−

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

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

    - Specify the pay period range from the **From PP** and **To PP** drop-down lists.

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

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

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

        - **Active & Inactive**. Allows you to view both active and inactive employees.

4. Click **Run Report**.

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

    –OR–

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

Audit Logs

The Audit Logs report provides access to running all types of audits available in the system. Specify a range of dates and a specific audit type to generate a report.

IMPORTANT! The system item must be enabled on the Audit Type Configuration page so that results are captured in the audit log. For example, if you want to run the report on "Manual Leave Adjustment Saved," make sure the Manual Leave Adjustment Saved check box is enabled on the Audit Type Configuration page, as shown below.

An example Audit Logs report is shown below. The system item specified is "Manual Leave Adjustment Saved."

To generate the Audit Logs report, take these steps:

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

   The Reports page opens.

2. Click **Audit Logs**.

   The page opens:

3. Use the following report parameters:

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

- Specify the date range in the **Date Range From** and the **Date Range To** fields.
- Select the audit from the Audit Type drop-down list.

4. Click **Run Report**.

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

–OR–

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

–OR–

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

Overtime Report

The Overtime report lists, by organization, the number of overtime hours worked in the pay period.

To generate the Overtime report, take these steps:

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

   The Reports page opens.

2. Click **Overtime Report**.

   The page opens:

3. Use the following report parameters:

   - Type optional text in the **Report Header** field. The text will appear in the report title.
   - Specify the pay period range in the **From PP** and the **To PP** fields.

- Click to enable the Exclude Delegate check box. (It is disabled by default.)

- Accept the organization.

  −OR−

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

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

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

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

- Click the **None Selected link** to select the Timekeeper's organization. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Timekeeper's Organization field populates.

4. Click **Run Report**.

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

   –OR–

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

   –OR–

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

Role Assignment

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

To generate a Role Assignment report, take these steps:

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

   The Reports page opens.

2. Click **Role Assignment**

   The page opens:

3. Use the following parameters:

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

     –OR–

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

   - Click the **Include Sub Orgs** check box to include sub-organizations.
   - Click the **Include Delegates** check box to include delegates for the role.
   - Click the **Users** drop-down list to specify a user status:
     - **Active**. Employees are still eligible to use webTA.

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

4. Click **Run Report**.

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

–OR–

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

–OR–

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

Supervisor Assignments

The Supervisor Assignment report lists employees assigned to Supervisors.

To generate a Supervisor Assignments report, take these steps:

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

The Reports page opens.

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

The page opens.

3. Optionally, use the following parameters:

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

    −OR−

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

- Click the **Include Sub Orgs** check box to include sub-organizations.
- Click the **Users** drop-down list to specify a user status:
    - **Active**. Employees are still eligible to use webTA.
    - **Inactive**. Employees' records are still in the system, but they no longer have access to webTA.
    - **Active & Inactive**. Allows you to view both active and inactive employees.

4. Click **Run Report**.

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

    −OR−

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

    −OR−

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

Telework by Employee Report

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

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

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

   The Reports page opens.

2. Click **Telework by Employee**.

   The page opens:

3. Use the following parameters:

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

     –OR–

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

   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Specify the pay period range. Select the starting pay period from the **From PP** drop-down list and the ending pay period from the **To PP** drop-down list.
   - Select a telework code from the **Transaction Code** drop-down list.

4. Click **Run Report**.

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

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

Telework by Organization Report

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

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

Telework by Organization Report

Report Date:	09/22/2015	
Pay Period	16 - 2015 : Aug 09, 2015-Aug 22, 2015 to 19 - 2015 : Sep 20, 2015-Oct 03, 2015	
Organization	**Transaction Code**	**Total Hours**
BEA	01 - Telework Home	16

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

   The Reports page opens.

2. Click **Telework by Organization**.

   The page opens:

3. Use the following parameters:

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

   - Accept the organization.

     –OR–

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

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

   - Specify the pay period range. Select the starting pay period from the **From PP** drop-down list and the ending pay period from the **To PP** drop-down list.

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

4. Click **Run Report**.

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

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

Telework Degree of Participation

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

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

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

   The Reports page opens.

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

   The page opens:

3. Use the following parameters:

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

     −OR−

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

   - Accept or clear the **Include Sub Orgs** check box. (It is enabled by default.)
   - Specify the pay period range. Select the starting pay period from the **From PP** drop-down list and the ending pay period from the **To PP** drop-down list.
   - Select the telework frequency from the **Telework Frequency** drop-down list.
   - Type the number of days in the **Day(s) Per** field.
   - Select the frequency from the **Frequency** drop-down list

4. Click **Run Report**.

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

   –OR–

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

   –OR–

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

Timekeeper Assignments

The Timekeeper Assignments report lists employees assigned to Timekeepers.

To generate a Timekeeper Assignments report, take these steps:

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

   The Reports page opens.

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

   The Timekeeper Assignments page opens.

3. Use the following parameters:

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

   - Accept the organization.

     –OR–

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

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

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

  - **Active**. Employees are still eligible to use webTA.

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

  - **Active & Inactive**. Allows you to view both active and inactive employees.

4. Click **Run Report**.

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

   –OR–

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

   –OR–

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

Transmission Listing Report

The Transmission Listing report displays the T&A data sent to NFC in the most recent build. (It does not include supplemental builds.)

To generate a Transmission Listing report, take these steps:

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

   The Reports page opens.

2. Click **Transmission Listing** on the Reports page.

   The Transmission Listing page opens.

3. Use the following parameters:

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

- Click the **Agency** drop-down list to select all agencies or a specific agency.

- Click the **State** drop-down list to select all states or a specific state.

- Complete the Town, Unit, and Timekeeper fields, or optionally, leave the fields blank.

- Click the **None Selected link** to select the Timekeeper's organization. The Organization Management page opens. Click **Select** on the row that identifies the organization. You return to the Report Parameters and the Timekeeper's Organization field populates.

- Click the calendar icon to specify the **Last Status Start Date** and the **Last Status End Date**. (This is the last status of the T&A.)

4. Click **Run Report**.

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

–OR–

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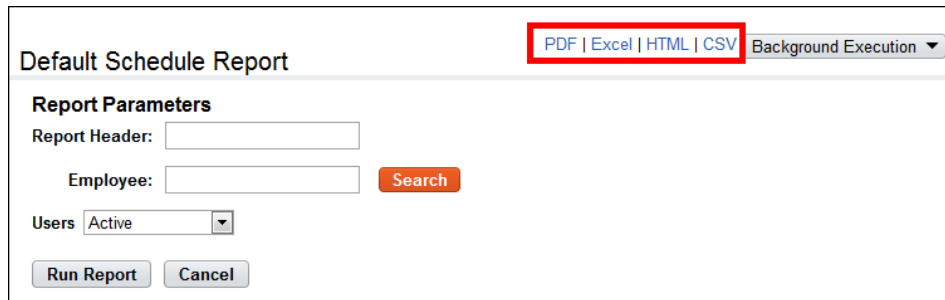
–OR–

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

Saving report output to files

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

- PDF
- Excel
- HTML
- CSV

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

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

1. Run the report.

   The report output appears.

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

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

3. Select an option.

   –OR–

   Click **Cancel** to dismiss the action.

About the Background Execution option

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

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

- PDF

- Excel

- HTML

- CSV

- Emailed PDF

- Emailed Excel

- Emailed HTML

- Emailed CSV

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

About My Saved and Scheduled Reports

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

The My Saved and Scheduled Reports page is shown below.

My Saved and Scheduled Reports page contents

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

- **All**. See all reports in any status.
- **Pending**. The report has been scheduled to run but has not been picked up by the report creation job yet.

- **Queued**. The report has been picked up by the report creation job.
- **Generating**. The report is now being run by the report creation job.
- **Complete**. The report has been successfully generated.
- **Error**. The system encountered an error upon generating the report.
- **Invalid**. When an ad hoc report structure is changed, all of the associated report schedule instances are marked invalid. You must create a new report schedule.

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

- **Name**. The name of the report
- **Report Name**. The name of the report.
- **Submitted**. The date and time that the report was submitted for execution.
- **Completed**. The date and time that the report finished.
- **Next Scheduled Date**. The date and time the report is next scheduled to run. (This option is only available with Advanced Reporting.)
- **Format**. The type of report output file. Options include: PDF, Excel, HTML, or CSV.
- **Status**. The current status of the report.
- **Pages**. The number of pages in the output.
- **Size (Bytes)**. The size of the output file.
- **Message**. System messages produced when the report was generated.
- **Download**. Download the report file to a local computer.
- **Rerun**. Run the report again.

Downloading reports

To download a report from the My Saved and Scheduled Reports table, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.

   The My Saved and Scheduled Reports page opens.

2. Click **Download** on the row that identifies the report.

   The File Download dialog opens.

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

   –OR–

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

   –OR–

   Click **Cancel** to cancel the operation.

E-mailing reports

To e-mail a report to yourself from the My Saved and Scheduled Reports table, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.

   The My Saved and Scheduled Reports page opens.

2. Click the check box on the row that identifies the report and then click **Email**.

A confirmation message appears.

3. Click **Yes** to e-mail the report.

    –OR–

    Click **No** to cancel the operation.

Deleting reports

To delete reports from the My Saved and Scheduled Reports table, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.

    The My Saved and Scheduled Reports page opens.

2. Click the check box on the row that identifies the report and then click **Delete**.

    –OR–

    Click the "X" on the row that identifies the report.

    A confirmation message appears.

3. Click **Yes** to delete the report.

    –OR–

    Click **No** to cancel the operation.

Rerunning reports

To rerun a report listed on the My Saved and Scheduled Reports table, take these steps:

1. Click **My Saved and Scheduled Reports** from the Reports section on the main menu.

    The My Saved and Scheduled Reports page opens.

2. Click **Rerun Now** on the row that identifies the report.

    A message confirms that the report has been submitted for execution.

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

Using the Ad Hoc Report Management tool

The Ad Hoc reports tool may be utilized for two primary 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 reports management tool and is available as a feature of the NFC Core product.

*   **Data extraction tool**. Administrators and other roles may use the tool to create reports that users may 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.

An example of the Adhoc Report page is shown below.

Adhoc Report page content

The Adhoc Report page includes features that you can use to create simple reports to more complex reports. Some of the features require skills outside the scope of this document (for example, SQL programming language.) Each feature is described below.

General Information

This area of the ad hoc 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 other users have access to 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. **NOTE**: *This option is only available with the webTA Advanced Reporting module.*
- 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 data that is directly associated with one or more users (for example, employee profiles, timesheets, leave balances, timesheet profile data, etc.) This is the default option.
  - Audit Data. This option provides access to data that is directly related to audit information (for example, invalid login attempts, etc.). This option is limited to Administrators.
  - Datasets. This option provides access to general purpose tables (datasets) that store data such as the listing of transaction codes, the listing of alternate work schedule values, the listing of pay plan values, and so forth.

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 Administrators. Reports that include the use of this feature cannot be published for access by other users.

Generated SQL

This feature provides insight into the database structure and allows Administrators and DBAs to examine how tables are joined. Copy and paste the generated SQL into a third party tool to analyze the generated SQL.

Columns

This feature lets you specify what data you want to be displayed in the report, for example, the employee's first and last name, 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.

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 you have created. This allows you 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, you can 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.)

Group Bys

This feature works in conjunction with the aggregate function specified in the Columns feature. For example, if you specify SUM for total hours in the user's timesheet, you would also need to specify how the data will be grouped.

Order Bys

This feature lets you specify the sort order in which the data will be presented in the report. Enable the check box to list data in ascending order.