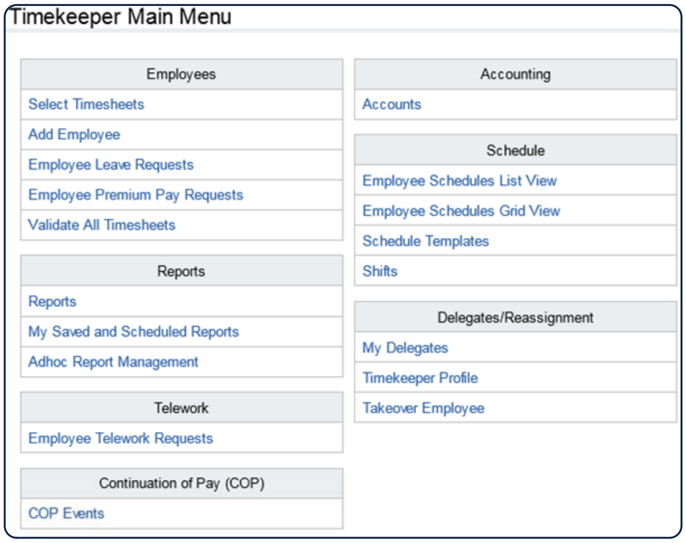
Timekeeper Role – Job Aid

Timekeeper Main Menu Overview



Select Timesheets
View list of assigned employees & perform tasks on their behalf

Add Employee
Add a new employee to the System

Employee Leave Requests
View Leave Requests submitted by employees assigned to you

Employee Premium Pay Requests
View Premium Pay Requests submitted by employees assigned to you

Validate All
Walk through each of your employees timesheets and Validate

Reports
View available Reports

My Saved and Scheduled Reports
View Reports that have been executed in the background

Adhoc Report Management
Create, save, modify, share and schedule custom reports

Employee Telework Requests
Add and submit, modify, print, or delete employee telework requests

COP Events
View Continuation of Pay events of Employees Assigned to you

Accounts
View and manage list of Accounts to which employees assigned to you can charge time

Employee Schedules List View
View a list of schedules of employees assigned to you, and view, submit, approve and edit employee schedules

Employee Schedules Gird View
View a grid of schedules of employees assigned to you, and view, submit, approve and edit employee schedules

Schedule Templates
View a list of schedule templates available for use in employee schedules

Shifts
View a list of shifts available for use in employee schedules

My Delegates
View, add or remove timekeepers who can perform functions for employees assigned to you

Timekeeper Profile
View, edit Timekeeper Profile

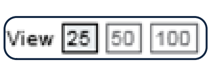
Takeover Employee
Take over as Timekeeper for an employee

Select Timesheets

1. From the Timekeeper Main Menu, select the **Select Timesheets** link.

   A list of employees assigned to the timekeeper should display.

The default number of employees listed is 25. To display more than the default, select “50” or “100” links at the bottom right of the table.



Click on the page numbers or arrows to display additional pages.

Select the links for each column title to sort the list of employees by that column.

For example, select the **Last Name** link to sort the list of employees by last name.

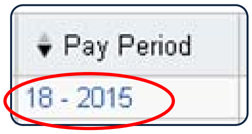
Use the **Pay Period**, **Timesheet Status, Organization, Delegates for and Timesheet Type** dropdown menus to filter the list of employees by any of these criteria. To search for a specific employee, enter their **User ID, Last Name, First Name, Timekeeper** or **Supervisor** in the corresponding text fields. Then, select the **Search** button.

Select the Clear button to reset the search fields.

View / Edit Employee Timesheet

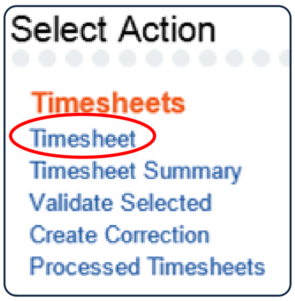
1. From the **Timekeeper Main Menu**, select the **Select Employees** link.

2. Select the link in the **Pay Period** column for the timesheet you wish to view/edit.



or

Select the checkbox to the left of the employee name for the desired pay period and select the **Timesheet** link below the table.



Add a New Work Time Entry

1. From the **Timekeeper Main Menu**, select the **Select Employees** link.

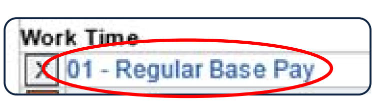
2. Select the link in the **Pay Period** column for the timesheet you wish to view/edit.

or

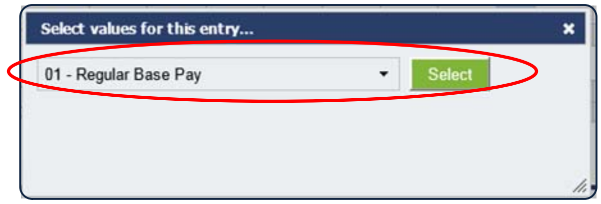
Select the checkbox to the left of the employee name for the desired pay period and select the **Timesheet** link below the table.

3. In the **Work Time** section of the timesheet, select the **Plus Sign** to add a row.

4. Select the **Transaction Code** link to modify the work time transaction.

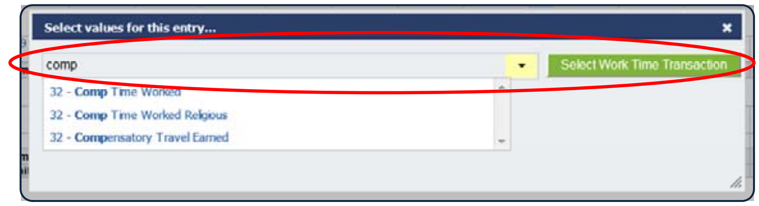


5. Expand the dropdown menu, locate the desired Transaction Code and click the **Select** button.



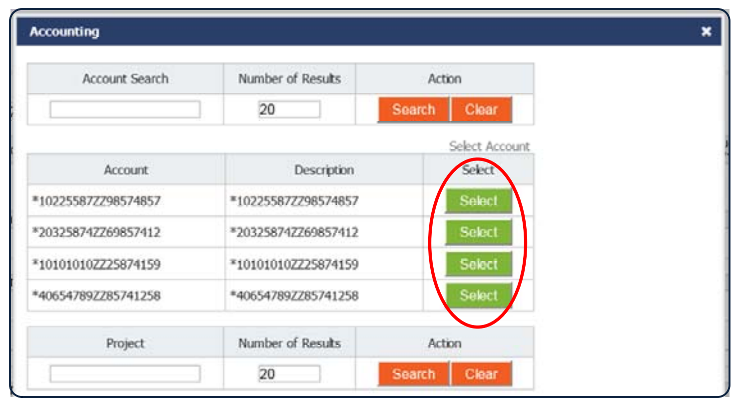
or

Begin typing the number or name of the desired Transaction to filter the list of codes displayed. Then select the desired code and click the **Select Work Time Transaction** button.



6. Select the **Select Account** link to add accounting or Project details.

7. Select the appropriate account from the list by clicking the **Select** button.



8. Enter the number of hours worked for this transaction for each day of the pay period.

Time can be entered in the HH:MM or decimal format. Time entered in decimal format will be converted to the HH:MM format by webTA.

Time entries will be rounded to 15 minute increments. For example, 4 hours and 7 minutes will round down to 4 hours, while 4 hours and 8 minutes will be rounded up to 4 hours and 15 minutes.

Additional Work Entries using different transaction codes and/or accounts can be added to the timesheet by repeating steps 3 through 7.

Leave Time can be added by selecting the plus sign in the Leave Time section of the timesheet, and repeating steps 3 through 7.

Leave Time will automatically be added to the timesheet upon submission of employee Leave Requests.

9 Select the **Save** button to save the timesheet.

Timesheet Statuses

Saved (S) – with Employee or Timekeeper

Pending Attestation (PA) – Employee has selected the Validate button, but has not Affirmed that the information added is correct.

Validated by Employee (VE) – Timesheet has been Validated the Employee and it is ready to be Certified by the Supervisor

Validated by Timekeeper (VT) - Timesheet has been Validated the Timekeeper and it is ready to be Certified by the Supervisor

Certified (C) – Timesheet has been Certified by Supervisor and will be picked up in the next build

Pre-Processed (PP) – Timesheet has been added to the build file, but has not been transferred to the Payroll Provider

Processed (P) – Timesheet has been Processed by Payroll Provider

Correction (COR) – A Correction has been created for a Processed Timesheet

Validate Employee Timesheet

At the end of each Pay Period, timesheets must be Validated by the Employee or their Timekeeper. Once Validated, they can be Certified by the Supervisor and processed by the Payroll Provider.

1 From the **Timekeeper Main Menu**, select the **Select Timesheet** link.

2 Select the link in the **Pay Period** column for the timesheet you wish to Validate, and select the **Validate** button.

or

Select the checkbox to the left of the employee name for the desired pay period and select the **Validate Selected** link below the table.

When a timesheet is Validated, webTA performs a series of checks based on the employee's profile *(pay plan, tour of duty, duty hours, alternative work schedule, etc.)* and other payroll rules.

If the hours entered satisfy the established Validation rules, the timesheet's status will change from Saved to Validated.

If the hours entered do not comply with the employee's profile settings or established validation rules, webTA will display an Error or a Warning at the top of the timesheet.

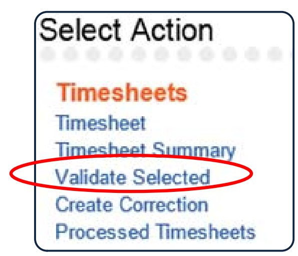
Errors must be addressed and corrected in order for the timesheet to Validate.

Warnings are suggestions, and the timesheet can be Validated, but the Warnings will still display.

Validate Multiple Timesheets

1 From the **Timekeeper Main Menu**, select the **Select Employees** link.

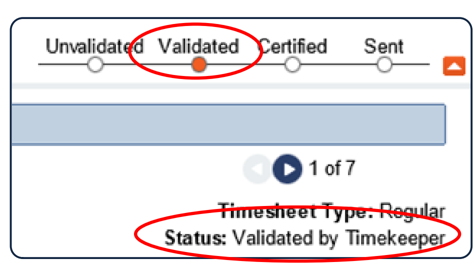
2 Select the checkbox to the left of the employee names for the desired pay period and select the **Validate Selected** link below the table.



The timesheet of the first selected employee will display.

3 Select the Validate button.

If successful, a confirmation message will display and the Status will change to Validated by Timekeeper.



4 Select the Next button to move to the next timesheet and repeat step 3 for each timesheet.

View and Submit Employee Schedule

1 From the **Timekeeper Main Menu**, select either the **Employee Schedules List** or **Grid View** link.

2 Select the link for the Employee whose schedule you wish to view or modify.

To view an existing schedule, select the schedule name link from the **Schedule Assignment** page.

3 To add a new **Permanent** or **Temporary Schedule**, select the corresponding button on the Schedule Assignment page.

4 To use an existing Schedule Template, select the **Insert Schedule Template** button.

5 Select the desired Schedule Template from the list and click the OK button.

6 Make any necessary changes to the Schedule Name, Description, number of weeks, and the Start and End Dates.

7 Select the **Submit** button.

Supervisors also have the ability submit and approve schedule requests.

To Manually add shifts, rather than using a Schedule Template, select the checkbox next to the day(s) to which you want to add time, and then select the **Insert Shift** button.

Select the row for the shift you want to add, and the shifts will appear on the selected days.

View Employee Leave Requests

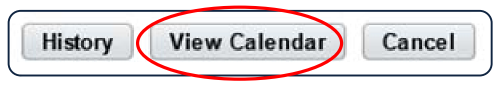
1 From the **Timekeeper Main Menu**, select the **Employee Leave request** link.

A list of Current Leave requests for employees in your organization is displayed.

List is sortable by selecting the column header.

2 View Leave Requests from past Pay Periods by selecting the **History** button.

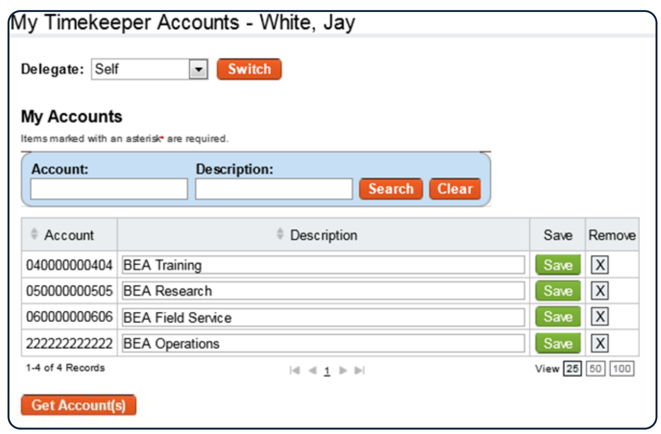
3 To display the Leave Requests as a Calendar, select the **View Calendar** button.



Manage Timekeeper Accounts

1 From the **Timekeeper Main Menu**, select the **Accounts** link.

A list of Accounts available to employees assigned to you is displayed.



2 **Descriptions** can be modified by entering text, and then selecting the Save button.

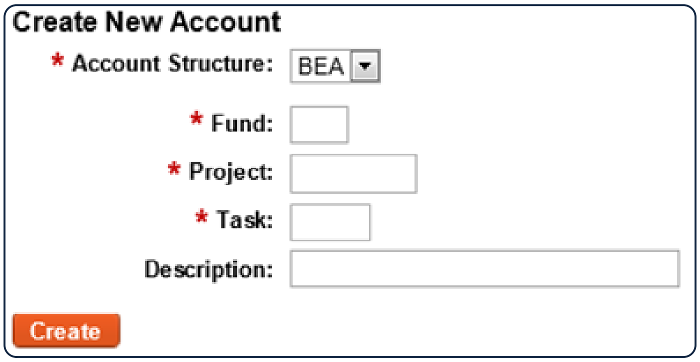
3 Select the "**X**" in the far-right column to remove the account from your list.

4 To add accounts to your list, select the **Get Accounts** button.

5 Click the **Select** button of the accounts you wish to add to your list.

Create a New Account

1. From the **Timekeeper Main Menu**, select the **Accounts** link.

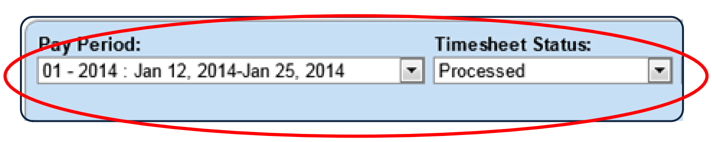


2. Select the **Account Structure** you wish to use.
3. Type the values of the **Fund**, **Project** and **Task** into the corresponding fields.
4. Select the **Create** button.

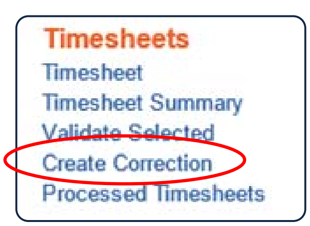
The Account can now be used by the employees assigned to you. They will see the account when they select the **Get Accounts** button from their **Accounts** page.

Correct a Processed Timesheet

1. From the **Timekeeper Main Menu**, select the **Select Employees** link.
2. To locate a processed timesheet for correction, use the **Timesheet Status** and **Pay Period** filters at the top of the employee list. Select the desired Pay Period and select **Processed** as the status, then select the **Search** button.



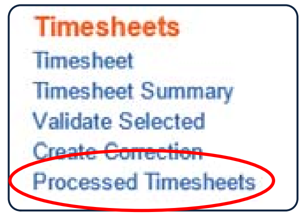
3. Locate the Timesheet needing correction, select it's checkbox and then select the **Create Correction** link.



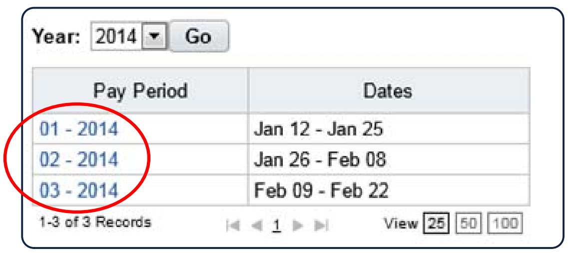
4. Make the desired changes to the Timesheet, and then Validate as you would a regular timesheet.

Alternate process for creating a Corrected Timesheet

1. From the **Timekeeper Main Menu**, select the **Select Employees** link.
2. Locate the employee for whom you are creating a correction, select their checkbox and then select the **Processed Timesheets** link.



3. Select the link for the Pay Period you are looking to correct.



4. Select the **Create Correction** button at the bottom of the Timesheet Summary.
5. Make the desired changes to the Timesheet, and then **Validate** as you would a regular timesheet.

Takeover Employee

1. From the **Timekeeper Main Menu**, select the **Takeover Employee** link.

A list of employees in your jurisdiction is displayed.

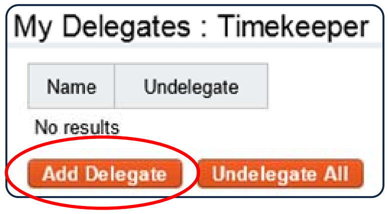
2. Select the **Select** button for the employees you wish to take over.

Selected employee is now assigned to you permanently.

Delegate Timekeeper Role

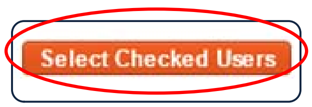
1. From the **Timekeeper Main Menu**, select the **My Delegates** link.

2. Select the **Add Delegates** button.



3. Select the checkbox next to the timekeeper(s) to whom you wish to assign as a delegate.

4. Select the **Select Checked Users** button.



Note: Use the user name search field to narrow the list of supervisors displayed. Type the user name and click Search.

To remove your delegates, select “**X**” next to their name. To remove all delegates, select the **Undelegate All** button.