

webTA 3.8

Project Manager's Guide

Document History

Date	Revision	Description	Author
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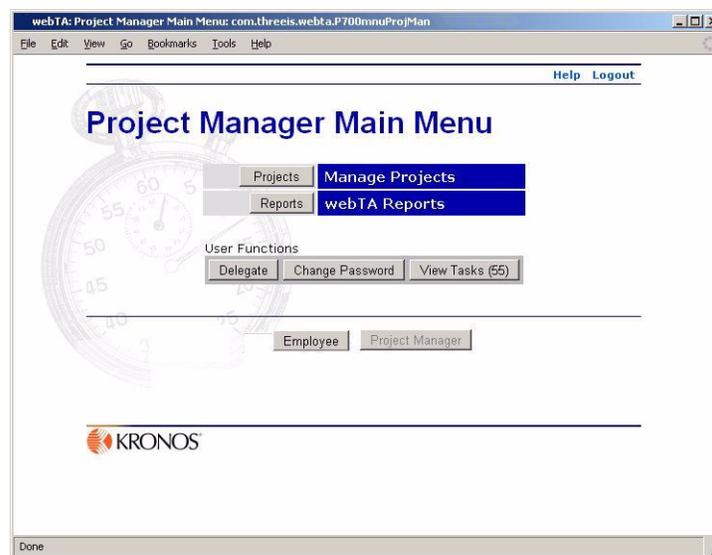
KRONOS® webTA 3.8 Project Manager's Guide

Introduction

Project managers administer the projects hierarchy, including maintaining basic project information, the hierarchical structure of the projects, employee and organizational membership to projects, and associations of projects with accounts.

This document provides information on how to fulfill these tasks in webTA. It is not intended to provide you with information about basic procedures such as logging in, searching for employees, or getting help. For information on how to use the basic functions of webTA, see the document *webTA Basics*.

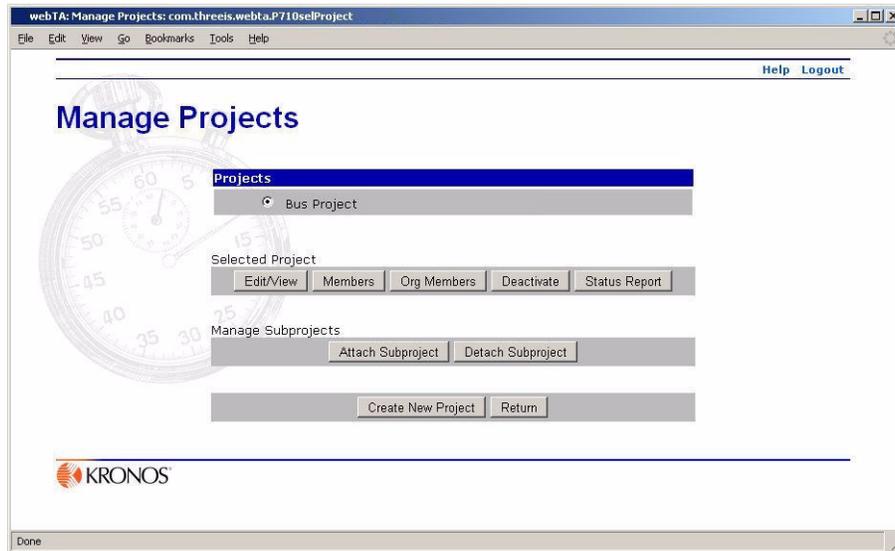
webTA's project manager functions are accessed from the Project Manager Main Menu page, which opens when you log in to webTA.



IMPORTANT! This document contains graphical representations (“screen shots”) of many of the browser pages that you will see as you use webTA. These screen shots may not appear exactly like the pages on your own screen. They may differ in some ways. However, the screen shots in this document are similar enough to what you will see so that they will help you work through the procedures and understand the examples in the documents.

Managing projects

Project management functions in webTA are accessed from the Manage Projects page, which opens when you click **Projects** on the Project Manager Main Menu page.



- **Edit/View** provides options for viewing and modifying project parameters, including project name, description, account information, and delegates.
- **Members** lets you add or remove members from a selected project.
- **Org Members** lets you add or remove project members by organization.
- **Deactivate** lets you remove all members from a project and stop more time charges to the project. Deactivated projects cannot be reactivated.
- **Status Report** provides, by employee and pay period, the total hours charged for each project you manage.
- **Attach Subproject** and **Detach Subproject** let you add or remove a sub-projects (child projects) from main projects (parent projects).
- **Create New Project** lets you create a new project by providing the project name, description, and project code account information

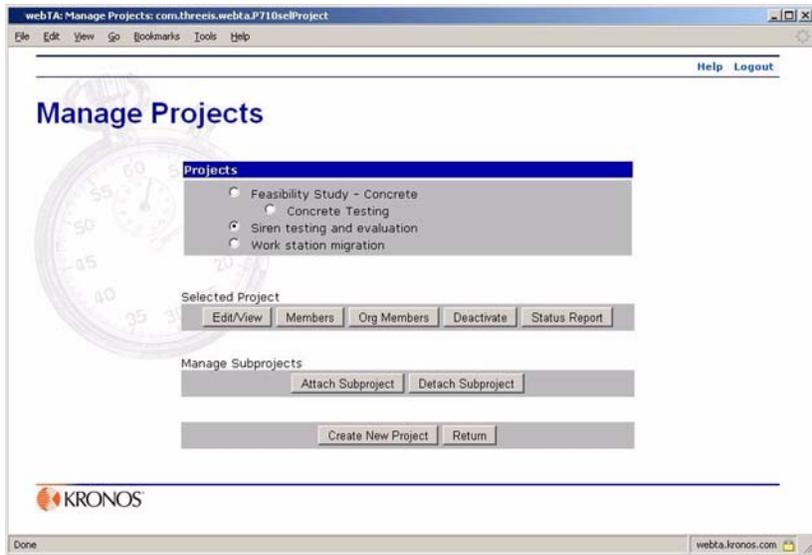
Viewing and modifying projects

The Edit/View Project page provides access to functions for viewing or modifying project descriptions, accounting, project code, and delegate information.

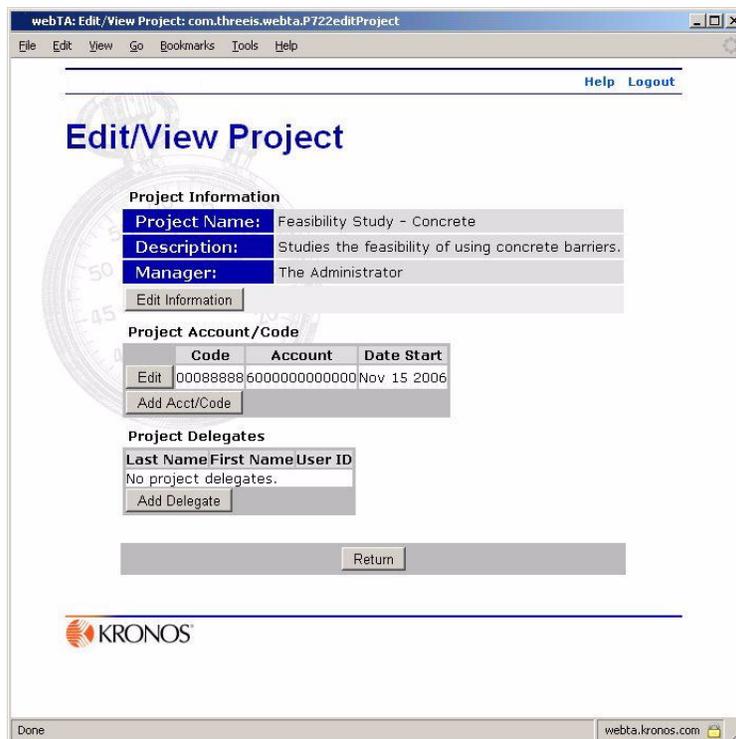
To open the Edit/View Project page for a project:

1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



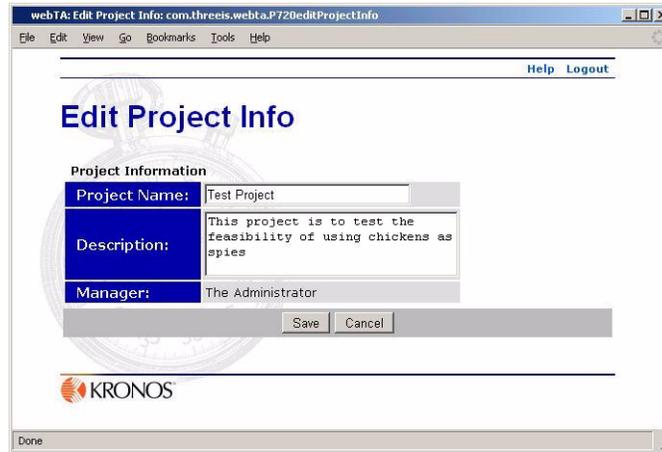
2. From the list in the **Projects** section, click to select the project or sub-project that you want to view or modify.
 3. Click **Edit/View**.
- The Edit/View Project page opens.



To modify the project name and description:

1. Open the Edit/View Project page for the project by clicking **Projects** on the Project Manager Main Menu page, selecting the project on the Manage Projects page that opens, then clicking **Edit/View**.
2. Click **Edit Information**.

The Edit Project Info page opens.

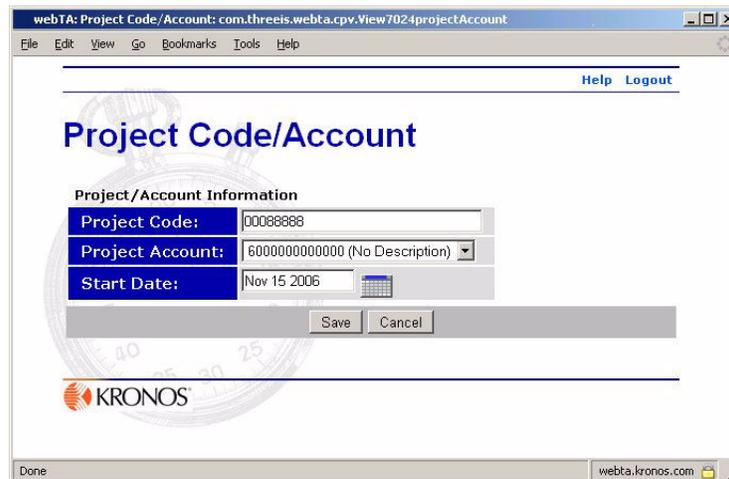


3. Type in a new project name or description, as needed, then click **Save**.
webTA makes the changes and returns you to the Edit/View Project page.

To modify project code and account information:

1. Open the Edit/View Project page for the project by clicking **Projects** on the Project Manager Main Menu page, selecting the project on the Manage Projects page that opens, then clicking **Edit/View**.
2. In the **Project Account/Code** section, click **Edit** next to the project account or code that you want to modify.

The Project Code/Account page opens.



Change the account information by typing in the **Project Code** box, selecting from the **Project Account** list, and choosing the start date from the pop-up calendar or typing in the date, as necessary.

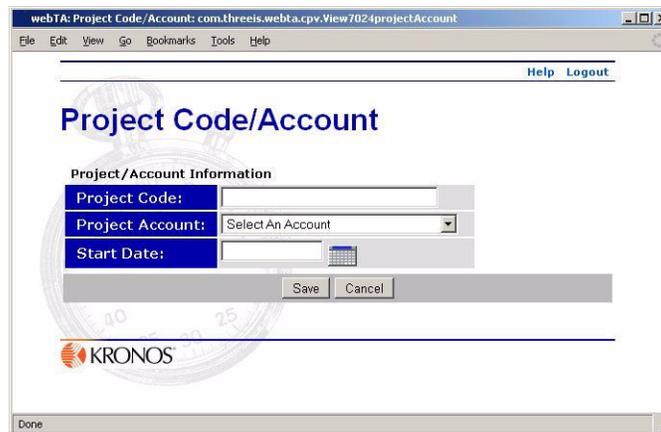
- Once a record containing a charge to the project is certified, the account association may no longer be changed.
- The existing project-account association remains in effect until the start date of a new association.
- Projects will not show up in project members' lists until a valid project code, account, and start date have been set.

3. Click **Save**.

To add an account to a project:

1. Open the Edit/View Project page for the project by clicking **Projects** on the Project Manager Main Menu page, selecting the project on the Manage Projects page that opens, then clicking **Edit/View**.
2. In the **Project Account/Code** section, click **Add Acct/Code**.

The Project Code/Account page opens.



The screenshot shows a web browser window titled "webTA: Project Code/Account: com.threeis.webta.cpv.View7024projectAccount". The browser's address bar and menu bar (File, Edit, View, Go, Bookmarks, Tools, Help) are visible. The page content includes a "Help Logout" link in the top right. The main heading is "Project Code/Account". Below this is a section titled "Project/Account Information" containing three input fields: "Project Code:" (a text box), "Project Account:" (a dropdown menu with "Select An Account" selected), and "Start Date:" (a text box with a calendar icon). At the bottom of the form are "Save" and "Cancel" buttons. The Kronos logo is visible at the bottom of the page. The browser's status bar at the bottom shows "Done".

3. Type the new project code, select the project account from the Project Account list, and designate a start date by typing the date or selecting it from the pop-up calendar.:

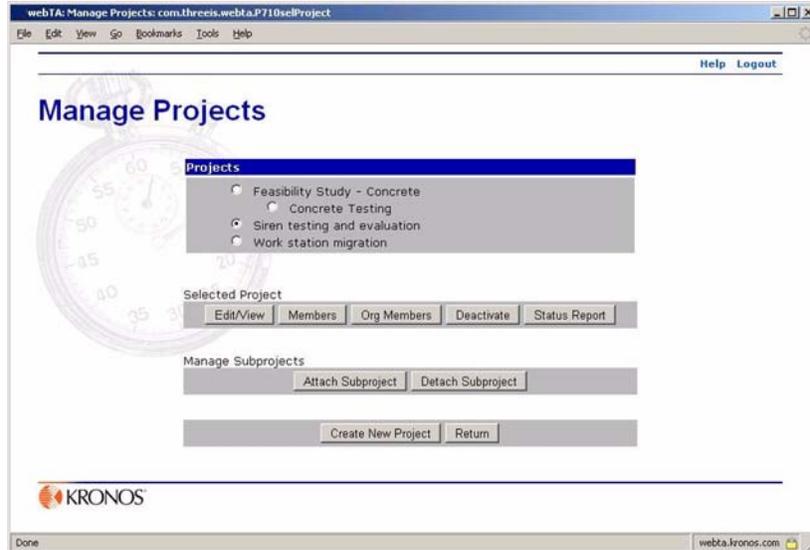
- Once a record containing a charge to the project is certified, the account association may no longer be changed.
- The existing project-account association remains in effect until the start date of a new association.
- Projects will not show up in project members' lists until a valid project code, account, and start date have been set.

4. Click **Save**.

To deactivate a project:

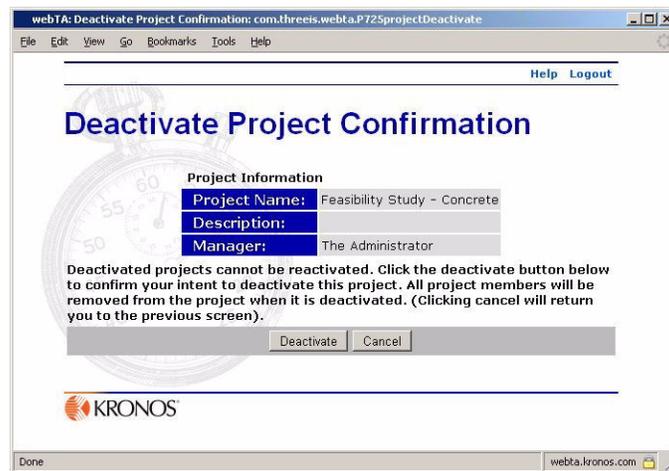
1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



2. Click to select the project that you want to deactivate, then click **Deactivate**.

The Deactivate Project Confirmation page opens.



IMPORTANT: Projects may not be re-activated. Be sure you want to deactivate a project before proceeding.

3. If you do not want to deactivate the project, click **Cancel**.

- OR -

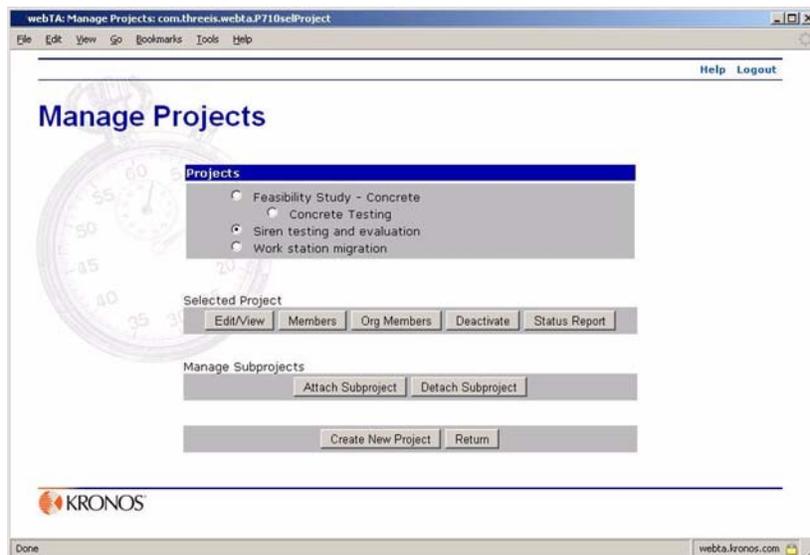
If you want to deactivate the project, click **Deactivate**.

Members of the project are deleted, and time can no longer be charged to it.

To view a report of total hours charged to a project:

1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



2. Click to select the project whose hours you want to view.

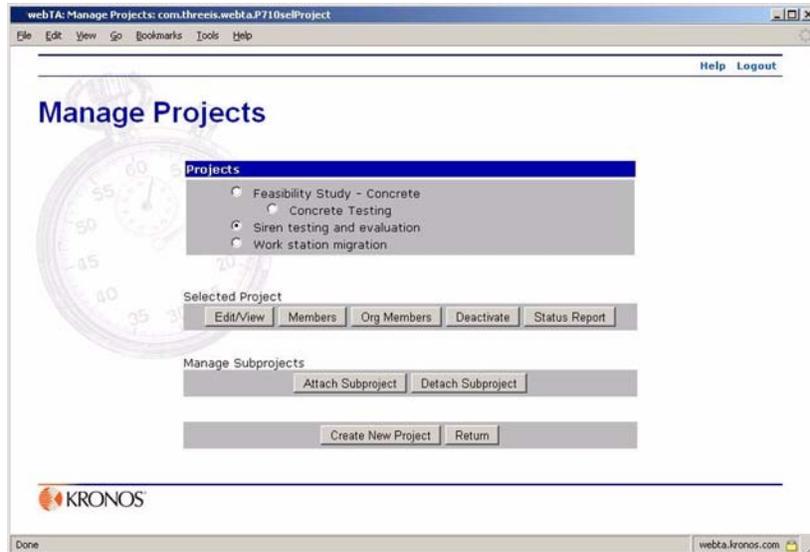
3. Click **Status Report**.

The Hours By Project page opens listing hours charged to the project and its sub-projects.

To add a subproject to a project:

1. On the Project Manager Main Menu page, click **Projects**.

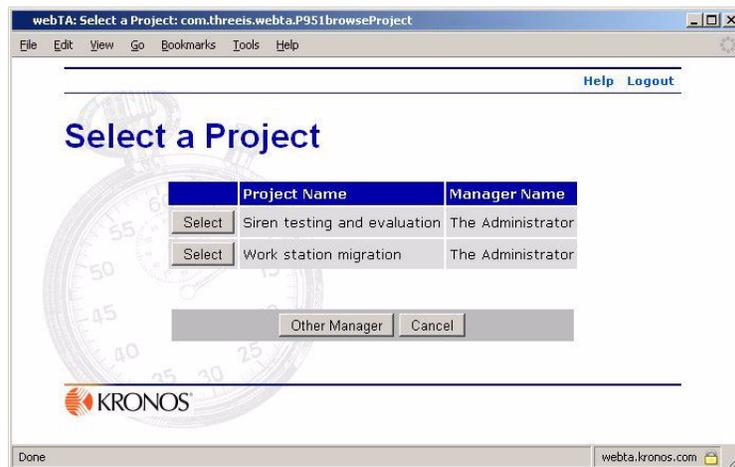
The Manage Projects page opens.



2. Click to select the project you want to attach the sub-project to.

3. Click **Attach Subproject**.

The Select a Project page opens.

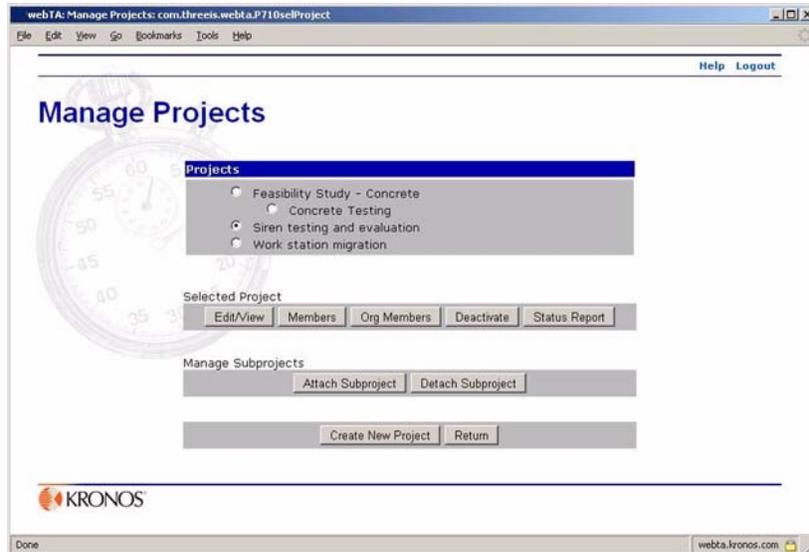


4. Attach a project to the main project by clicking **Select** next to the chosen project.
webTA adds the project you selected as a sub-project on the Manage Projects page.

To remove a sub-project from a project:

1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



2. Click to select the sub-project you want to remove from the parent project.

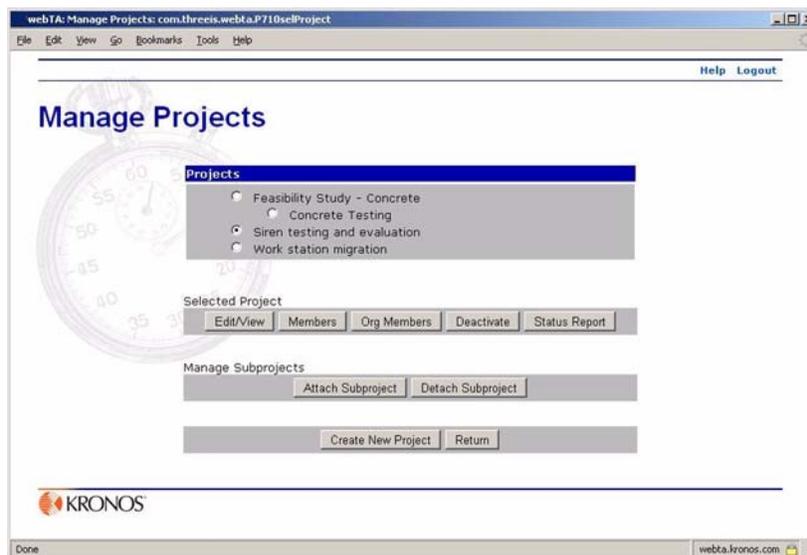
3. Click **Detach Subproject**.

webTA removes the sub-project from the parent project.

To create a new project:

1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



2. Click **Create New Project**.

The Edit Project Info page opens.

The screenshot shows a web browser window with the title "webTA: Edit Project Info: com.threeis.webta.P720editProjectInfo". The browser's address bar displays "webta.kronos.com". The page content includes a navigation bar with "Help" and "Logout" links. The main heading is "Edit Project Info". Below this, there are two sections of form fields. The first section, "Project Information", contains: "Project Name:" (text input), "Description:" (text area), "Parent Project:" (text input with a "Search" button), "Copy Parent Members:" (checkbox), and "Is Leave Project:" (checkbox and a dropdown menu with "Annual Leave" selected). The second section, "Project/Account Information", contains: "Project Code:" (text input), "Project Account:" (dropdown menu with "Select An Account" selected), and "Start Date:" (text input with a calendar icon). At the bottom of the form are "Save" and "Cancel" buttons. The Kronos logo is visible at the bottom left of the page content.

3. Create the new project by typing in the appropriate project information, searching for a parent project, if necessary, and selecting the appropriate options from the lists, then click **Save**.

webTA adds the project to the Manage Projects projects list.:

- Once a record containing a charge to the project is certified, the account association may no longer be changed.
- An existing project-account association remains in effect until the start date of a new association.
- Projects will not show up in project members' drop down lists until a valid project code, account, and start date have been set.

Managing project members

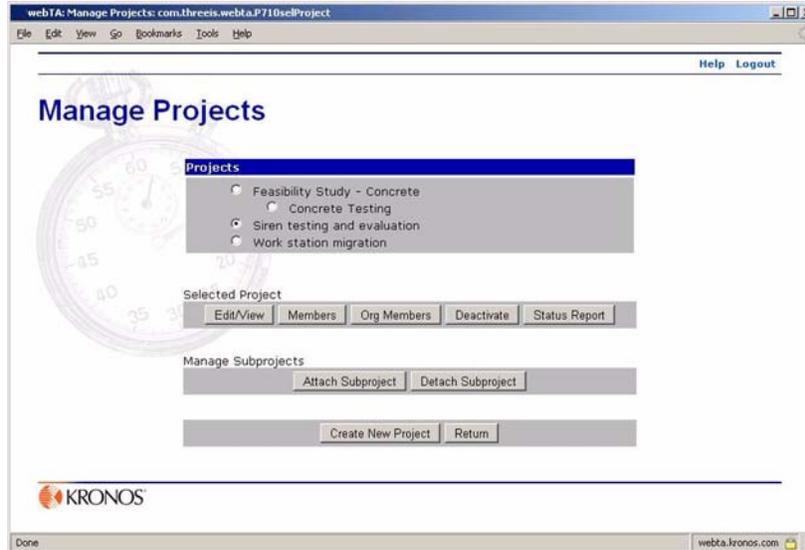
Project members are employees who may charge time to the project. All members of an organization may charge to a project if the organization is a project member.

NOTE: Projects will not appear in members' T&A pages until they have associated accounts.

To add a member of your organization to a project or sub-project:

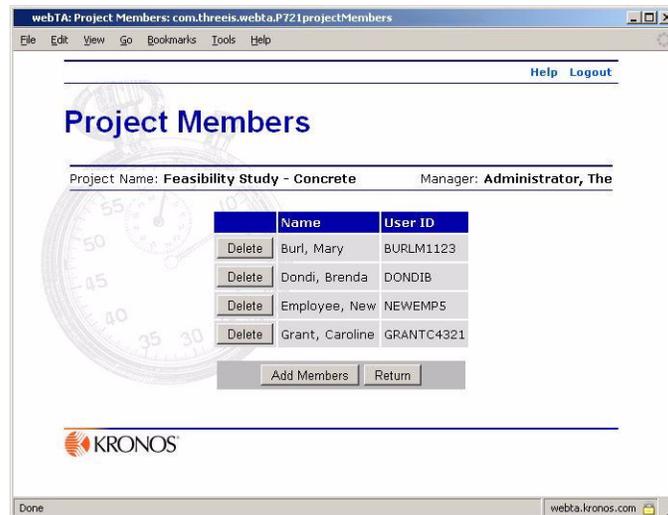
1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



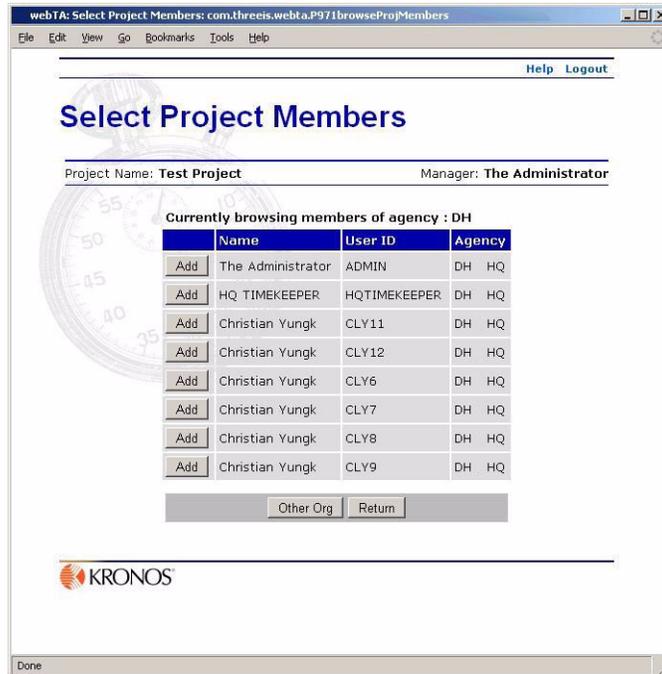
2. From the list in the **Projects** section, click to select the project or sub-project you want to add a member to.
3. Click **Members**.

The Project Members page for the project you selected opens.



4. Click **Add Members**.

The Select Project Members page opens showing members of your organization. Members already included in the selected project are designated as *Listed*.



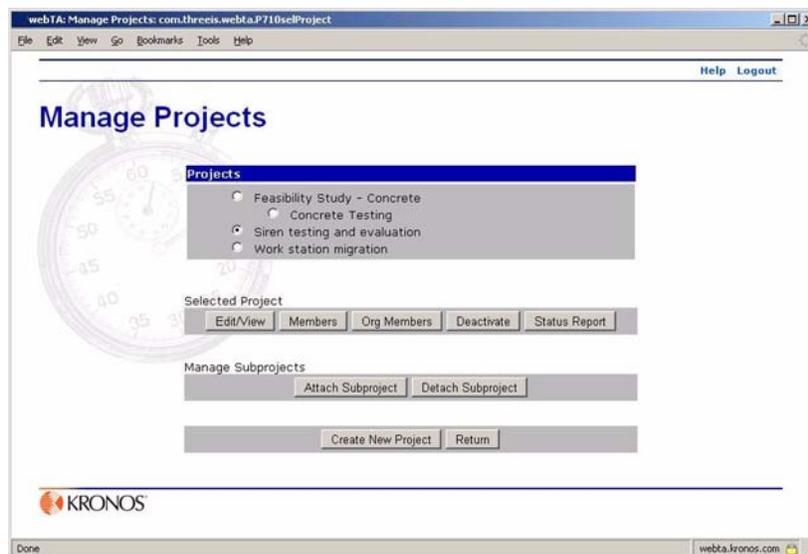
5. Add one or more members to the project by clicking **Add** next to each employee who you want to add, then click **Return**.

The members are added to the Project Members page.

To add a member of another organization to a project or sub-project:

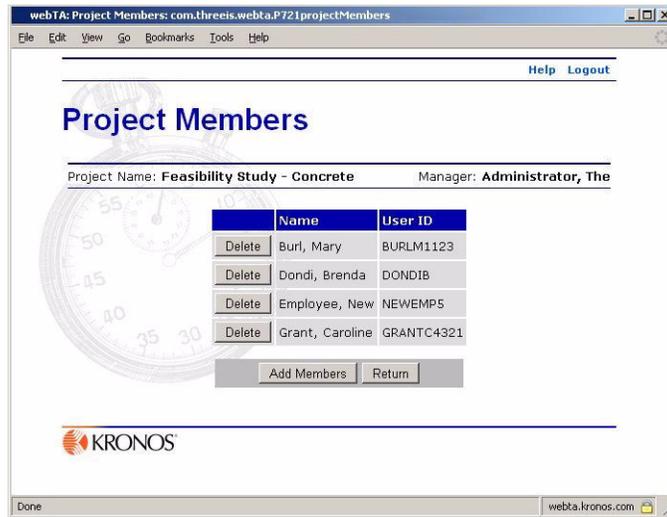
1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



- From the list in the **Projects** section, click to select the project or sub-project you want to add a member to.
- Click **Members**.

The Project Members page for the project you selected opens.



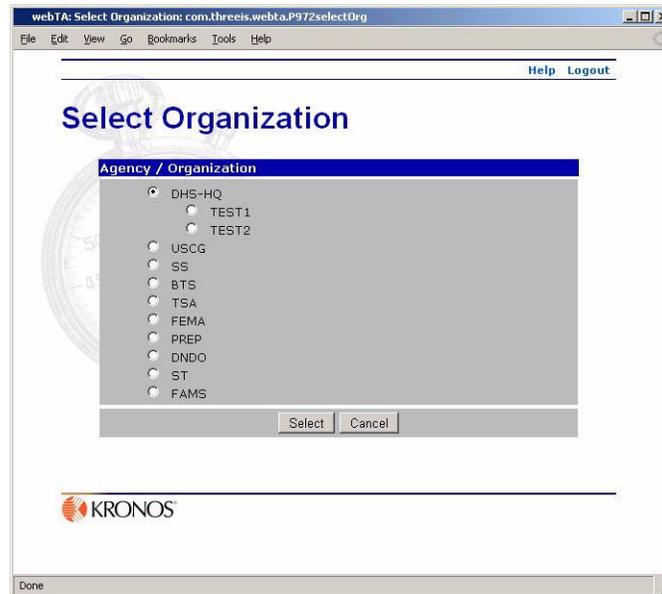
- Click **Add Members**.

The Select Project Members page opens showing members of your organization.



5. Click **Other Org**.

The Select Organization page opens.



6. Click to select the organization from which you want to add members to the project, then click **Select**.

The Select Project Member page opens showing members of the organization you selected.

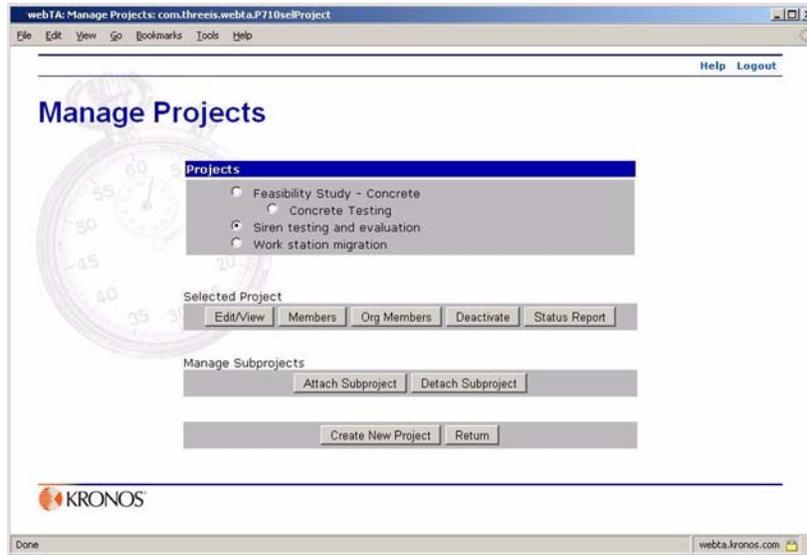
7. Add one or more members to the project by clicking **Add** next to each employee that you want to add, then click **Return**.

The members you added appear on the Project Members page.

To add all members of an organization to a project:

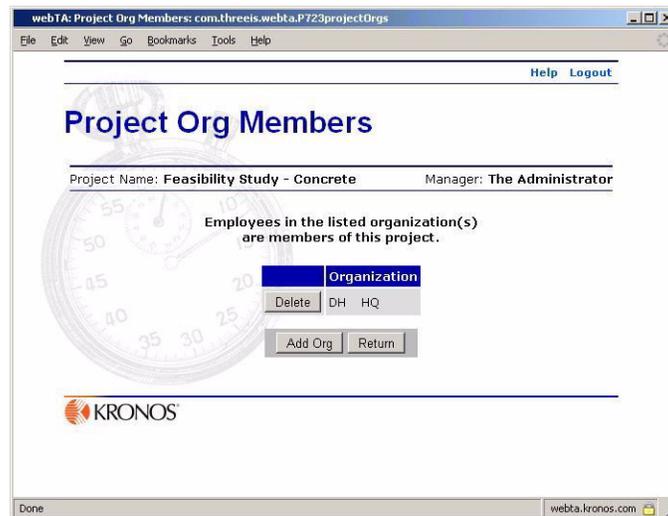
1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



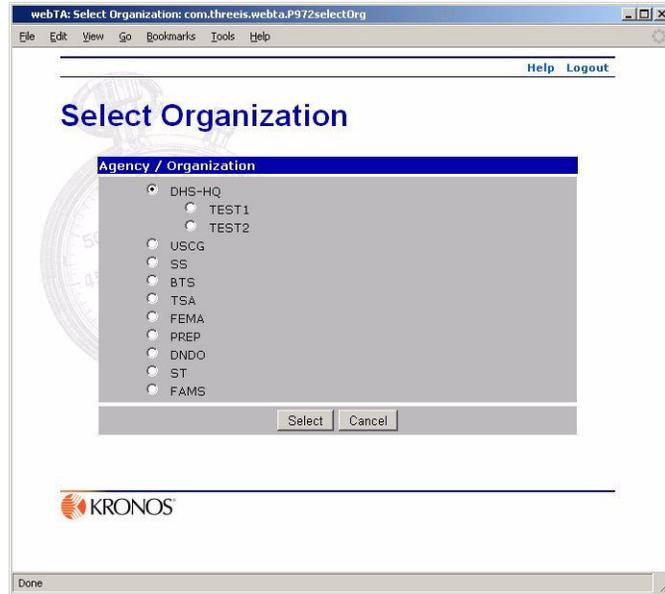
2. Click **Org Members**.

The Project Org Members page opens.



3. Click **Add Org**.

The Select Organization page opens.



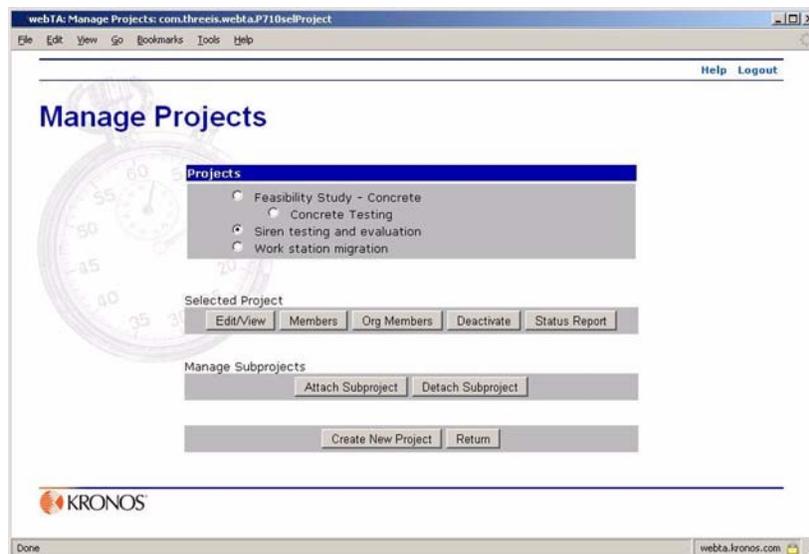
4. Click to select the organization or sub-organization whose members you want to add to the project, then click **Select**.

webTA adds the organization to the list on the Project Org Members page.

To remove members from a project or sub-project:

1. On the Project Manager Main Menu page, click **Projects**.

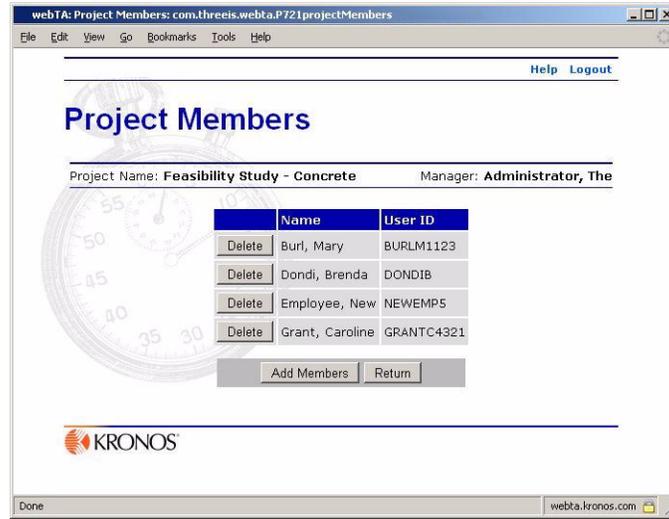
The Manage Projects page opens.



2. From the list in the **Projects** section, click to select the project or sub-project you want to remove members from.

3. Click **Members**.

The Project Members page for the project you selected opens.

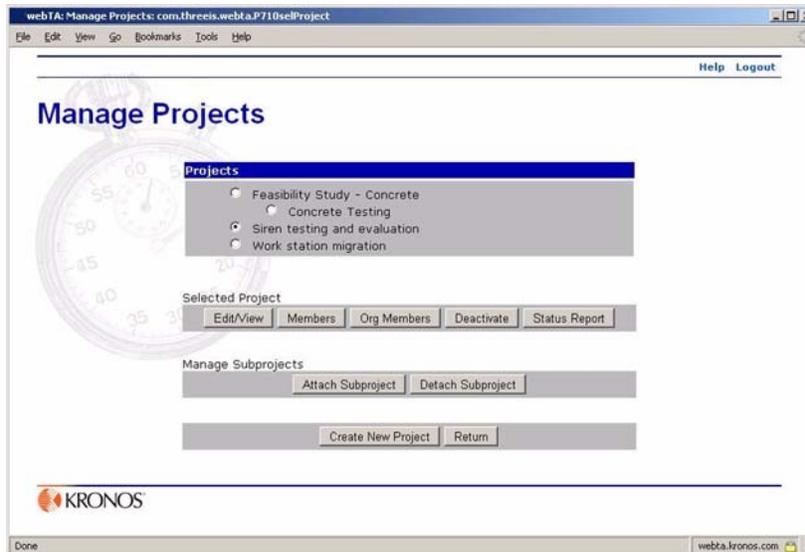


4. Click **Delete** next to the name of the member you want to remove.
webTA removes the member from the Project Members list.
5. If you want to remove additional members, repeat step 4.

To delete all members of an organization from a project:

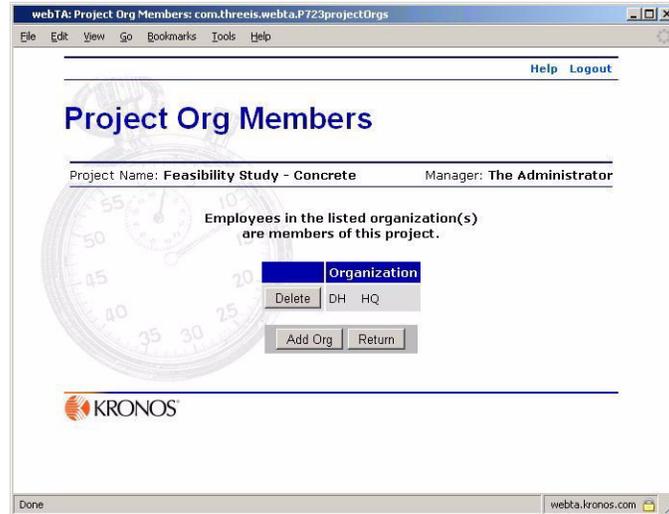
1. On the Project Manager Main Menu page, click **Projects**.

The Manage Projects page opens.



2. Click **Org Members**.

The Project Org Members page opens.



3. Click **Delete** next to the organization you want to remove.
webTA removes the organization from the Project Or Members list.
4. If you want to delete all members of additional organizations in the project organization members list, repeat Step 3.

Managing project delegates

Delegates for a project have all of the authority over the project that the official Project Manager does, as well as the ability to take over as the official Project Manager.

To add a delegate to a project:

1. Open the Edit/View Project page for the project by clicking **Projects** on the Project Manager Main Menu page, selecting the project on the Manage Projects page that opens, then clicking **Edit/View**.
2. In the **Project Delegates** section, click **Add Delegate**.
3. Search for and select the employee you want to add as a delegate.
webTA adds the new delegate in the **Project Delegates** section of the Edit/View Project page.

To remove a delegate from a project:

1. Open the Edit/View Project page for the project by clicking **Projects** on the Project Manager Main Menu page, selecting the project on the Manage Projects page that opens, then clicking **Edit/View**.
2. In the **Project Delegates** list, click **Del** next to the delegate you want to delete.
webTA deletes the delegate from the Project Delegates list.

Delegating the Project Manager role

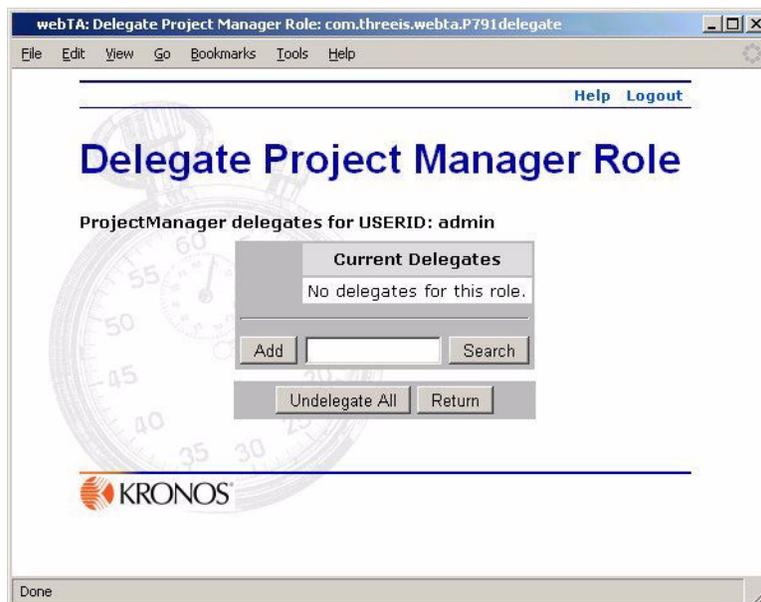
Project Managers may want to delegate their roles to others so that the role can be covered if they are absent. Note that this is not the same as delegating a person to a project. Project Manager role delegates manage all the projects of the original Project Manager, and also have the same administrative functions as the original Project Manager.

Delegates you assign receive all of your privileges to administer projects. If you want to assign a delegate role only to individual projects, assign delegates on the Edit/View Project page for each project.

To delegate the Project Manager role:

1. Click **Delegate** on the Project Manager Main Menu page.

The Delegate Project Manager Role page opens.

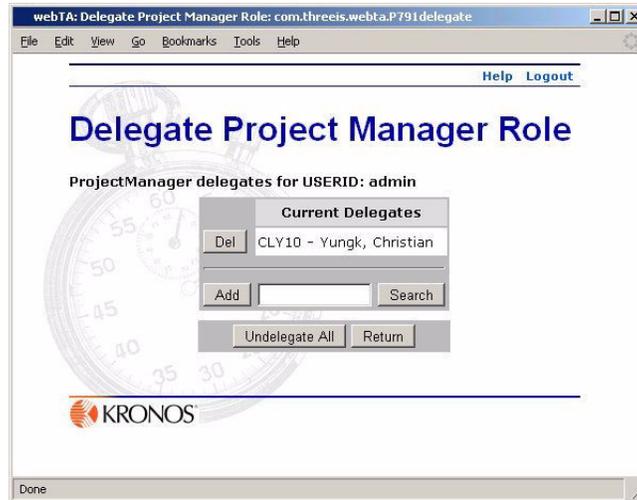


2. Either type in the user ID for the person you want to delegate to, or search for and select the employee using webTA's search function.
3. Click **Add**.
webTA adds the delegated employee to the Current Delegates list.
4. If you want to add more delegates, repeat steps 2 and 3.

To remove all Project Manager role delegations:

1. Click **Delegate** on the Project Manager Main Menu page.

The Delegate Project Manager page opens.

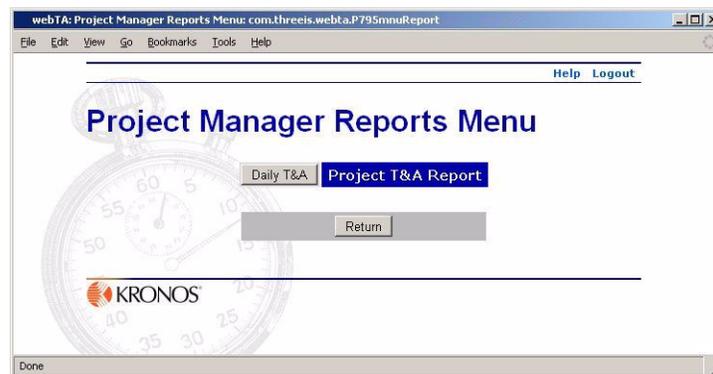


2. Click **Undelegate All**.

All delegates to the Project Manager role are undelegated and removed from the **Current Delegates** list.

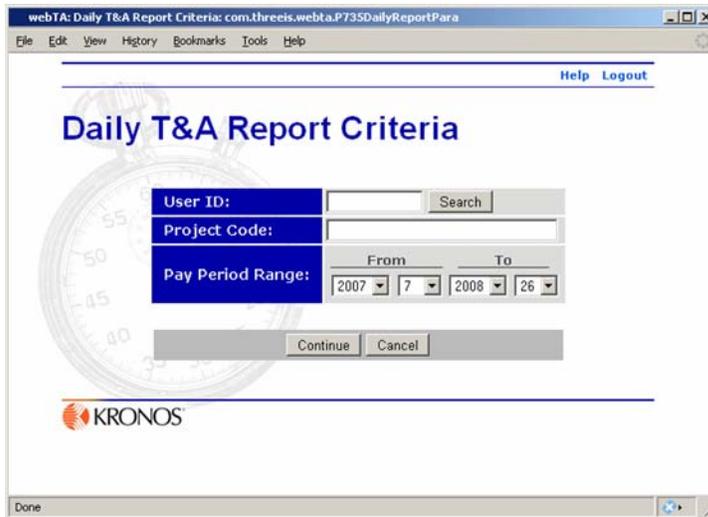
Generating a Daily T&A report

1. On the Project Manager Main Menu page, click **Reports**
The Project Manager Reports Menu page opens.



2. Click **Daily T&A**.

The Daily T&A Report Criteria page opens.



3. If you want to generate the report for an employee, type the employee's user ID in the **Userid** box, or search for and select the employee.

- OR -

If you want to generate the report for an active project, enter the project code in the **Project code** text box.

NOTE: Reports can be generated based on only one criterion, not a combination of two or more.

4. Define the time range for the report by selecting beginning and ending dates from the **From** and **To** lists.
5. Click **Continue**.

webTA generates the report of the hours charged according to the criteria you chose.