webTA 3.8

HR Administrator’s Guide

Document History

Date	Revision	Description	Author
2/17/08		Initial release	Bruce McGarvey

Contents

webTA 3.8 HR Administrator's Guide

Introduction

The purpose of this document is to provide HR Administrators information needed to use webTA for fulfilling HR Administrator job functions available in this application. 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*.

The HR Administrator role provides administrative functions to manage employees and leave transfer programs.

HR Administrators cannot edit time and attendance information, a responsibility reserved for Timekeepers and employees, but they can add and edit employee profiles and ensure that records are processed for all employees in the agency.

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.

The HR Administrator Main Menu page opens when you log in.

All webTA functions available to HR Administrators are accessed from this page.

The first three buttons on the HR Administrator Main Menu provide access to employee maintenance functions, enabling you to add and edit user information, including employee profiles, pay periods, leave audit reports, and locator information.:

- **Select** opens a list of employees from which you can add and edit the records of selected employees, including their pay periods, profiles, leave audit reports, certified T&As, and locator information.
- **Search** takes you to pages from which you can search for employees according criteria that you choose, and modify records for both active and inactive employees.
- **New** lets you create a new employee record for a person who does not yet have a record in webTA.

The remaining buttons provide tools directly related to HR Administration job functions:

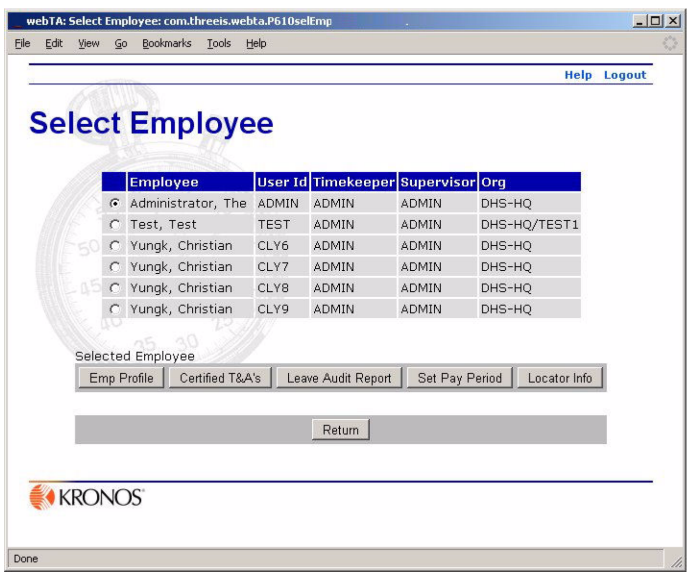
- **LTP** provides access to Leave Transfer Program functions.
- **Org Tree** provides access to functions that let you edit organizations and sub-organizations in your organization tree.
- **Accounts** gives you access to functions for adding new accounts and editing account descriptions.

- **Roles** lets you view and manage Timekeeper, Supervisor, and Project Manager role delegations and globally change Timekeeper and Supervisor employee assignments.
- **Import** lets you import employees and some parts of their time and attendance data from existing NFC transmission files.
- **Reports** lets you generate reports that show the current status of records in your webTA database for employees in your organization.

Selecting employees

By selecting an employee, you can change employee profiles, set pay periods, generate leave audit reports, view certified T&As, and modify Locator (contact) information

On the HR Administrator Main Menu page, clicking **Select** opens the Select Employee page listing all employees in your agency:

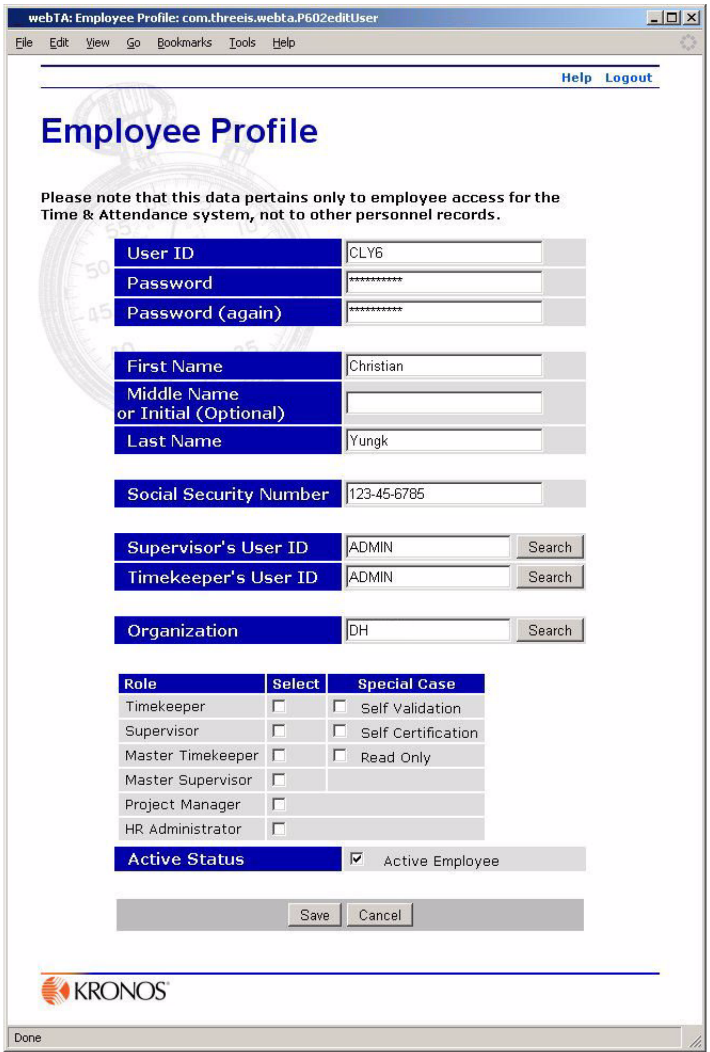


The buttons on the page provide access to various administrative functions:

- **Emp Profile** lets you view and modify an employee’s user ID, password, name, Social Security number, Timekeeper, and Supervisor, and assign certain roles to employees.
- **Leave Audit Report** provides an employee’s leave information listed by leave type.
- **Set Pay Period** lets you change an employee’s current pay period.
- **Locator Info** provides fields that you can fill with employees’ location information, such as address, telephone numbers, e-mail address, and so forth.

About employee profiles

After selecting an employee in the Select Employee page, clicking **Emp Profile** opens the employee's profile page.



When a time card is certified, most of the fields on this page cannot be modified until the record is built or becomes uncertified. When you add a new employee via the webTA interface, however, most or all of the fields will be empty.

The fields on this page are:

- **User ID**
- **Password**
- **Password (again)**, for verifying the accuracy of the previous entry
- **First Name**
- **Middle Name or Initial (Optional)**

- **Last Name**
- **Social Security Number**

  This field is required. (You do not need to enter the dashes between the 3 parts of the SSN.)
- **Supervisor's User ID** – The user ID for the employee's Supervisor.

  You can use webTA's search function to find a Supervisor's user ID.
- **Timekeeper's User ID** – The user ID for the employee's Timekeeper.

  You can use webTA's search function to find a Timekeeper's user ID.
- **Organization** – The employee's organization within the agency.

  This is an optional field. By default, the root of the organization tree is the agency.
- **First Pay Period -** The pay period the new record applies to.
- **Role**, **Grant Role**, and **Select Role Property** – The roles a specific employee has, and the options, if any, set for the employee.
- **Active Status** – When selected, indicates that an employee is active.

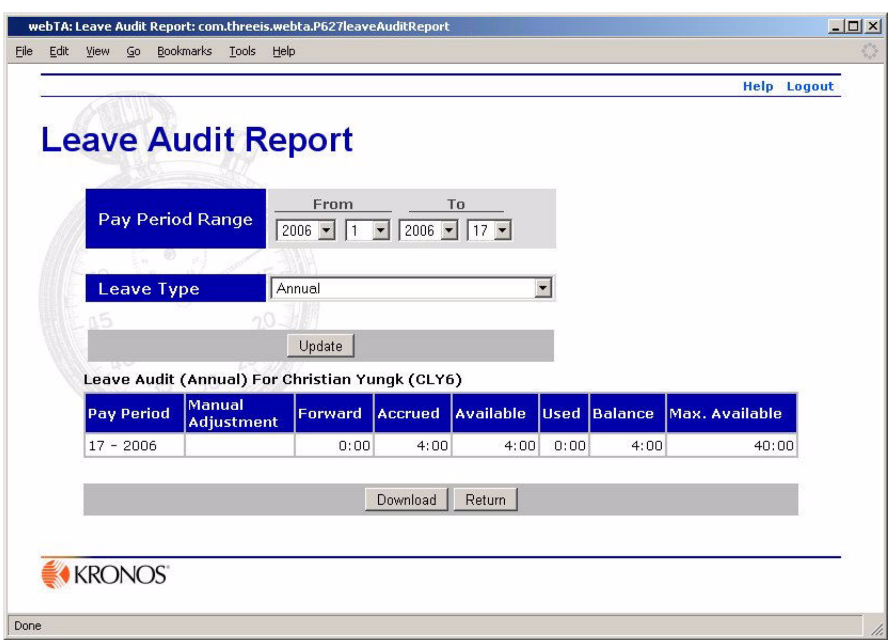
  This box is selected by default when a new employee record is created. See the section "About inactive status" for detailed information about status.

You can change an employee's user ID and password on this form. The user ID must be from four to 32 characters long. You may use letters, numbers, and spaces.

Edit the employee's name by first name, last name, and middle initial, each in their respective fields. Do not combine names in one name field. You may include a suffix, such as Jr. or III, in the **Last Name** field.

About the Leave Audit Report page

After selecting an employee in the Select Employee page, clicking **Leave Audit Report** opens the Leave Audit report page for that employee.



Initially, the Leave Audit Report contains leave data for the most recent leave year for which the selected employee has certified records. If the employee has records in the system for more than one leave year, you can include the other leave years in the report by changing the **From** and **To** dates.

A Leave Audit Report can be generated to reconcile historical leave records for a selected employee. The report displays a line for each pay period that the employee has certified records for in the system.

A Leave Audit Report displays one page for each type of leave that webTA tracks. The selector at the top of the page lets you change the type of leave displayed on the page.

These columns are included in the Leave Audit Report:

- **Pay Period** contains the number of the pay period within the leave year as well as the leave year.

  Pay period 01 is the first pay period that falls completely within the 26 pay period year.
- **Manual Adjustment** contains any changes (increases or decreases) to the forwarded balance of any leave type on the leave data page.

  This is helpful for tracking if leave balances have been manually adjusted at any point.
- **Forward** contains the leave balance that was forwarded from the prior pay period.

  Usually, this will be equal to the balance column in the previous row.
- **Accrued** contains the amount of leave accrued during the pay period.

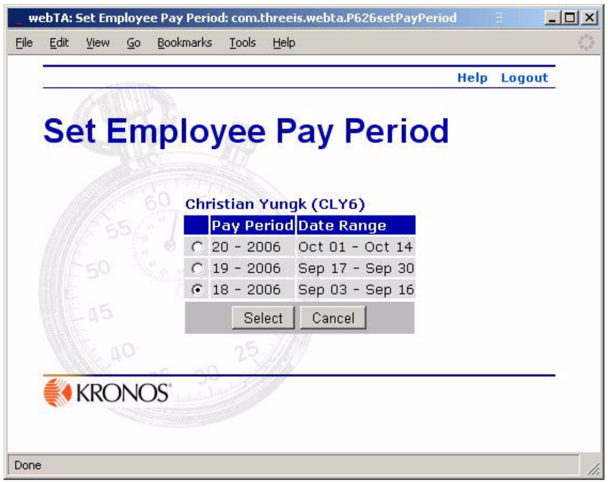
  For leave types that do not accrue, such as AWOL, this column will be blank.
- **Available** contains the total amount of leave available for use in the pay period. This is usually the forwarded amount plus the accrued amount. For leave types that are not accruable, this field is blank.
- **Used** contains the amount of leave the employee used in the pay period.

  This is usually the sum of the T&A data the employee submitted for the pay period. For annual and sick leave, it may also include Leave Transfer Program donations.
- **Balance** contains the ending balance for the pay period. This is usually the available leave minus the leave used. For non-accruable leave, this is usually the forwarded amount minus the used amount.
- **Max. Available** shows the maximum annual leave that is available, which is the sum of the maximum accruable leave and the forwarded amount minus the used amount.

You can open or download a copy of a Leave Audit report in Microsoft® Excel .XLS format by clicking **Download** on the report page.

Setting an employee’s pay period

After selecting an employee in the Select Employee page, clicking **Set Pay Period** opens the Set Employee Pay Period page for that employee.



The Set Pay Period page is used to change an employee's current pay period.

Pay periods are set in situations in which an employee might not have entered their time for a previous pay period, or when their time was not validated, certified, and built for a previous pay period.

The Set Pay Period function lets the HR Administrator adjust the employee's pay period to correct these situations.

The list of available pay periods is determined by when the employee last had a certified T&A record.

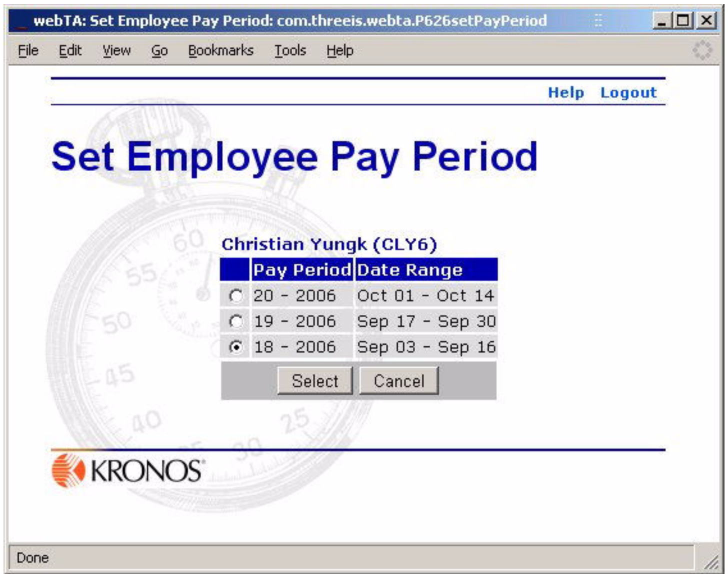
- If the employee's last certified record was the previous pay period, then there will be no choices.
- If the employees last certified pay period was several pay periods before the current pay period, then all of the pay periods between the previously recorded and current pay period are listed.
- If the employee has never had a certified T&A record, then all of the previous 26 pay periods can be chosen.
- If the employee's current T&A has leave transfer time used, then the pay periods cannot be changed.

The pay period for a certified or corrected T&A cannot be changed.

To set an employee's pay period:

1. Search, or search for and select, the employee, then click to select the employee from the Select Employee page.
2. Click **Set Pay Period**.

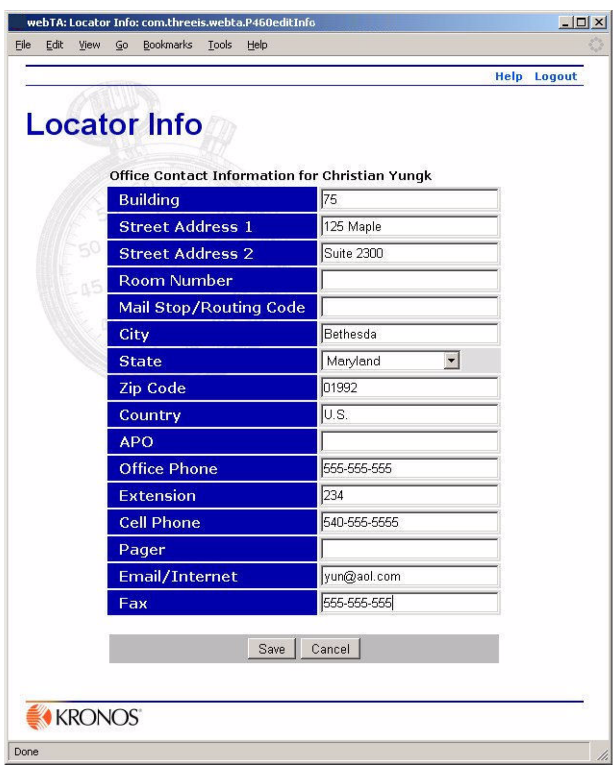
   The Set Employee Pay Period page opens.



3. Click to select the appropriate pay period, then click **Select**.

About the Locator Info page

The Locator Information page provides a means of maintaining contact information for employees within the webTA system. Use of this information is dictated by your organization's policy.



IMPORTANT! webTA does not require that all locator information be maintained. However, if webTA is configured to distribute tasks via e-mail, the employee's e-mail address must be entered. If the e-mail field is blank, the task will be delivered through webTA's task list.

NOTE: Information on the Locator Info page is work information. Personal information, such as home address and phone number, must be changed through the personnel office.

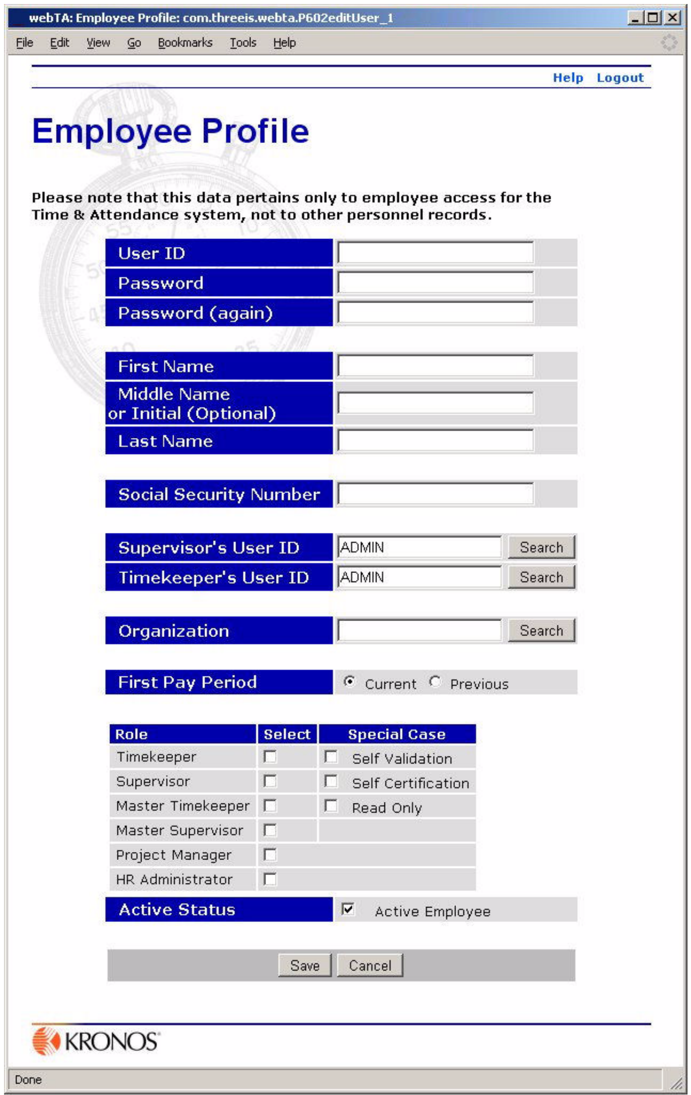
Employees can also edit this data, and the employee's Supervisor can view it.

Adding a new employee

To add a new employee:

1. Click **New** on the HR Administrator Main Menu page.

   A blank Employee Profile page opens.



2. Type the employee information into the appropriate boxes, using the search function when necessary, and select the appropriate pay period and role options.

   For the First Pay Period, if the person started within the current pay period, select **Current**. If the person started in the previous pay period, click to select **Previous**.

3. If it is not already selected, click to select **Active Status**

4. Click **Save**.

   The profile is stored, a record for the current pay period is created, and the employee can now log in to webTA.

About inactive status

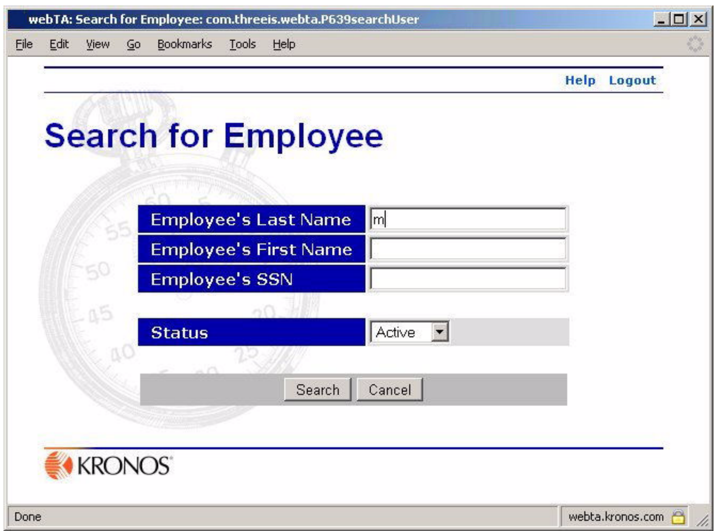
When employees are made inactive, their records remain in the system, but they are no longer able to log into the T&A system, and their records are ignored during verification, certification, and transmission file builds.

If an employee's account has been rendered inactive and the employee returns to the organization, the account can be reactivated. (There is no need to create new webTA user records for returning employees.)

To access records for inactive users:

1. On the HR Administrator Main Menu, click **Search**.

   The Search for Employee page opens.



2. Select **Inactive** from the **Status** list, then click. **Search**.

   webTA generates a list of all of the inactive employees in the system.

Reactivating an employee

When employees are made inactive, their records are not deleted from the system, but they are no longer be able to log into the T&A system, and their records are ignored during validation, certification, and transmission file builds.

If an inactive employee becomes active at a later date, rather than creating a new record, you can edit their existing Employee Profiles and reactivate them.

The process for reactivation is similar to editing an employee profile.

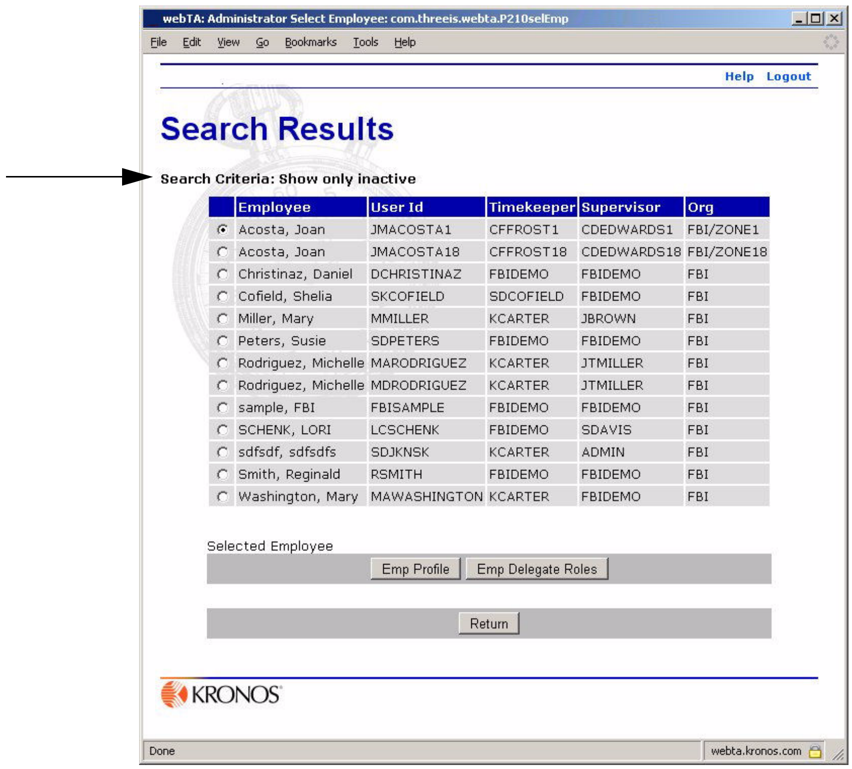
To reactivate an employee:

1. Search for the employee that you want to reactivate, selecting **Inactive** from the **Status** list.

   IMPORTANT! If you do not select **Inactive**, only active employees will appear in the search results.

2. Click **Search**.

   The Search Results page opens, displaying inactive employees who meet your search criteria.

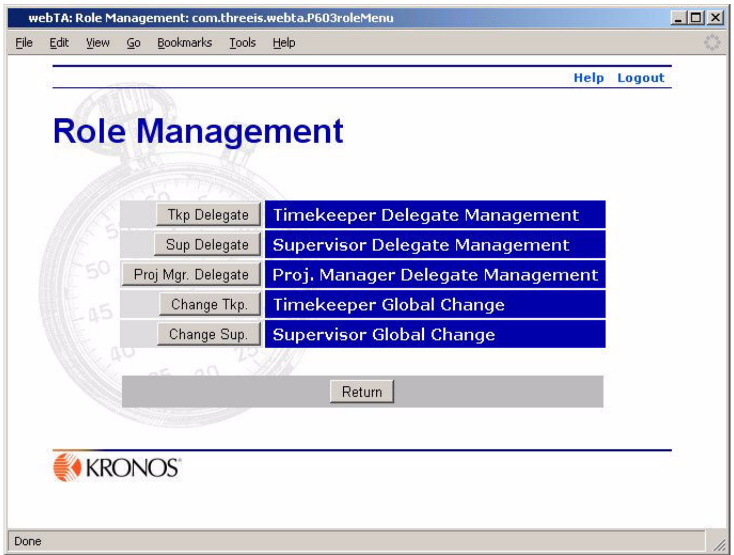


3. Click to select the employee who you want to reactivate.
4. Open the employee's profile by clicking **Emp Profile**.
5. If necessary, reassign a Timekeeper and Supervisor.
6. Assign the appropriate roles and click to select the appropriate special cases.
7. Click to select the **Active Employee** box.
8. Click **Save**.

About Role Management

HR Administrators have role management responsibilities in webTA. In addition to assigning roles on the Employee Profile form, HR Administrators can also assign delegates for Timekeepers, project managers, and supervisors. Additionally, they can globally reassign a group from one Timekeeper to another, or from one Supervisor to another.

Role management functions are accessed from the Role Management page, opened by clicking **Roles** on the HR Administrator Main Menu page.



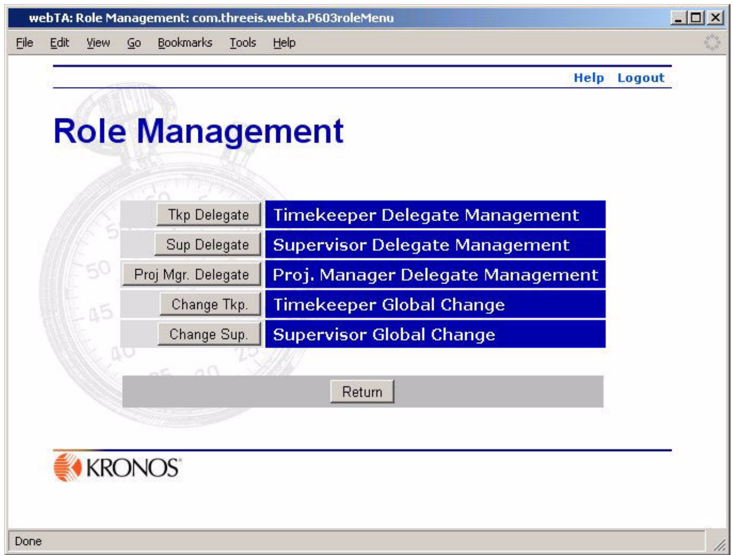
Managing Timekeeper delegates

The functions on this page let you assign a Timekeeper delegate to perform the duties of a Timekeeper who is unavailable.

NOTE: Timekeepers usually assign delegates for themselves. Use the function described here only in unusual circumstances in which both a Timekeeper and assigned delegates are unavailable.

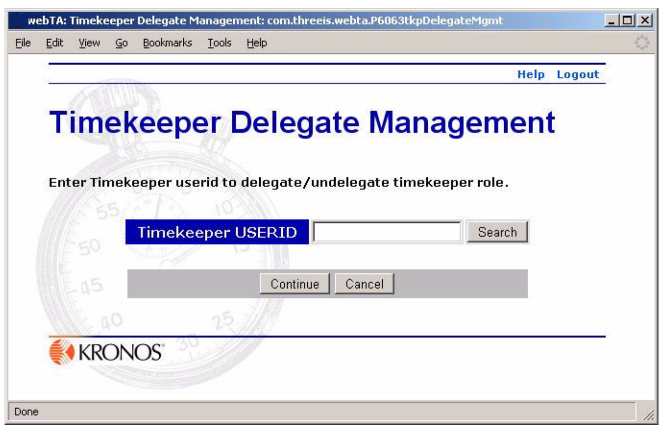
To add a Timekeeper delegate:

1. Click **Roles** on the HR Administrator Main Menu page.
2. The Role Management page opens.



3. Click **Tkp Delegate** on the Role Management page.

   The Timekeeper Delegate Management page opens.

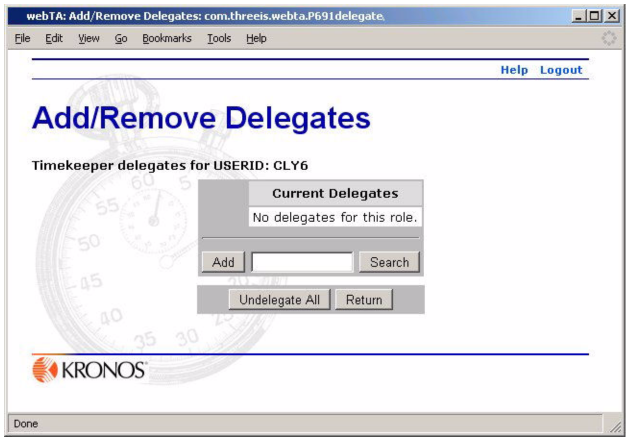


4. In the **Timekeeper USERID** box, type in the user ID for the Timekeeper who is to be delegated for.

   If necessary, search to find the Timekeeper using webTA's search function.

5. Click **Continue**.

   The **Add/Remove Delegates** page opens.



6. In the **Add** box, type the Timekeeper delegate's user ID.

   If necessary, search to find the Timekeeper using webTA's search function.

   In this case, the delegate does not need to have the Timekeeper role assigned before being made a delegate.

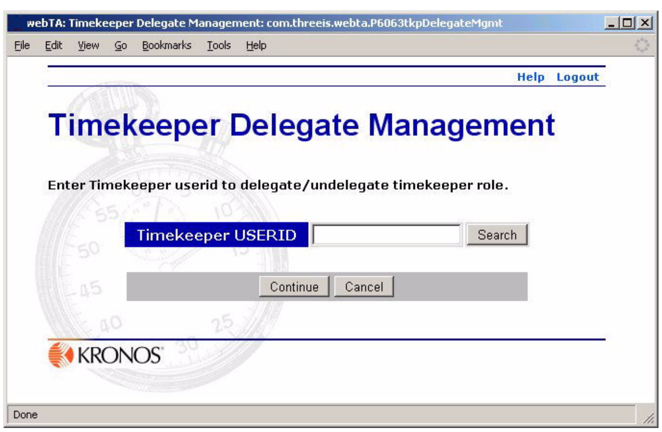
7. Click **Add**.

   The user ID for the new delegate is added to the **Current Delegates** list.

To remove Timekeeper delegates:

1. Click **Roles** on the HR Administrator Main Menu page, then click **Tkp Delegate** on the Role Management page.

   The Timekeeper Delegate Management page opens.

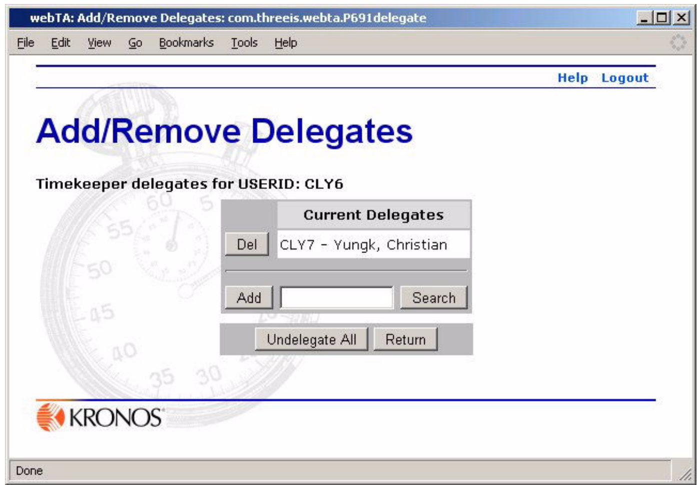


2. In the **Timekeeper USERID** box, type in the user ID for the Timekeeper who you want to remove a delegate from.

   If necessary, search to find the Timekeeper using webTA's search function.

3. Click **Continue**.

The Add/Remove Delegates page opens.



4. If you want to delete all delegates simultaneously, click **Undelegate All**.

   All delegates are removed from the Current Delegates list.

   \- OR -

   If you want to delete individual delegates, click **Del** next to the delegate's line in the Current Delegates list.

   The delegate is removed from the Current Delegates list

Managing Supervisor delegates

This function lets you assign or remove Supervisor delegates.

To designate a Supervisor delegate:

1. Click **Roles** on the HR Administrator Main Menu page, then click **Sup Delegate** on the Role Management page.

   The Supervisor Delegate Management page opens.

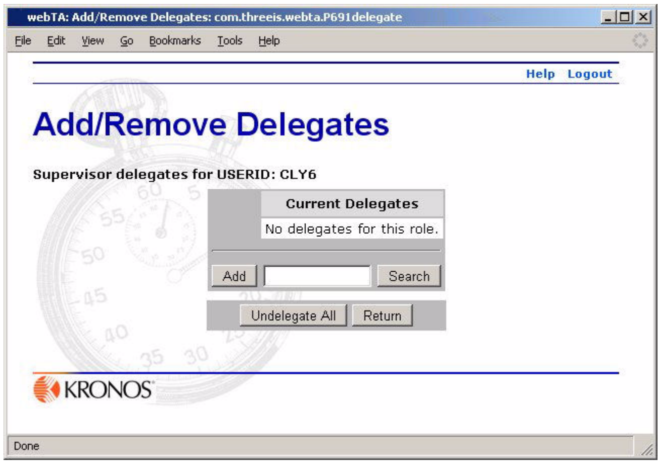
2. Type in the user ID of the Supervisor for whom you are creating a delegate for.

   If necessary, use webTA's search function.

   If selected from a search, the user ID of the selected Supervisor appears in the **Supervisor USERID** box on the Supervisor Delegate Management page.

3. Click **Continue.**

   The Add/Remove Delegates page opens.



4. In the box next to the **Add** button, type in the user ID of the Supervisor being delegated.

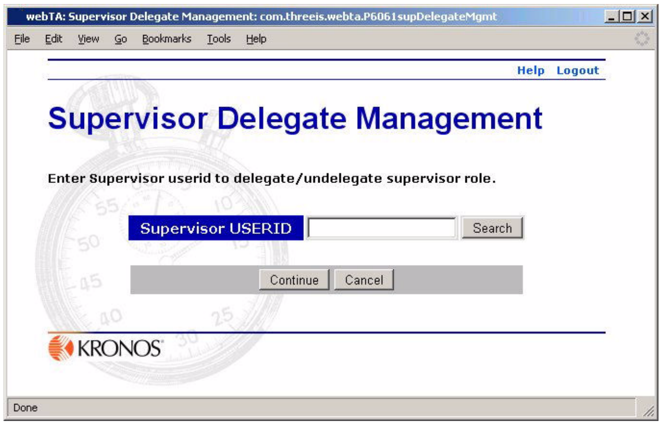
5. Click **Add**.

   The newly delegated Supervisor's user ID appears in the Current Delegates list on the Add/Remove Delegates page.

To remove Supervisor delegates:

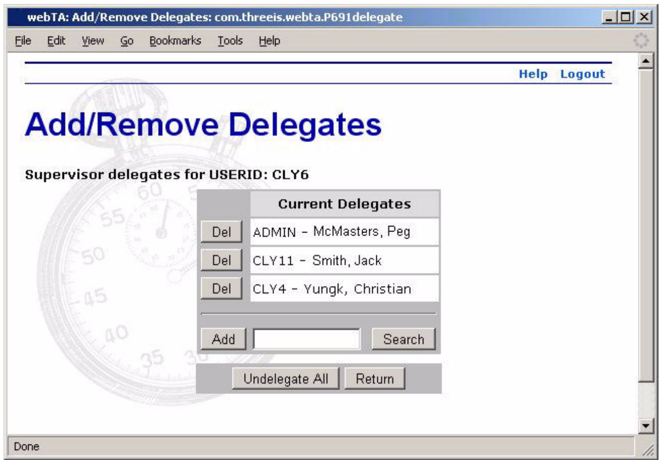
1. Click **Roles** on the HR Administrator Main Menu page, then click **Sup Delegate** on the Role Management page.

   The Supervisor Delegate Management page opens.



2. Search for and select, or type in the user ID for, the Supervisor for whom you are creating a delegate.
3. Click **Continue.**

   The Add/Remove Delegates page opens.



4. If you want to remove all delegates simultaneously, click **Undelegate All**.

   All delegates are removed from the Current Delegates list.

   - OR -

   If you want to remove one delegate, from the **Current Delegates** list, select the delegate you want to remove, then click **Del**.

   The delegate you deleted is removed from the Current Delegates list.

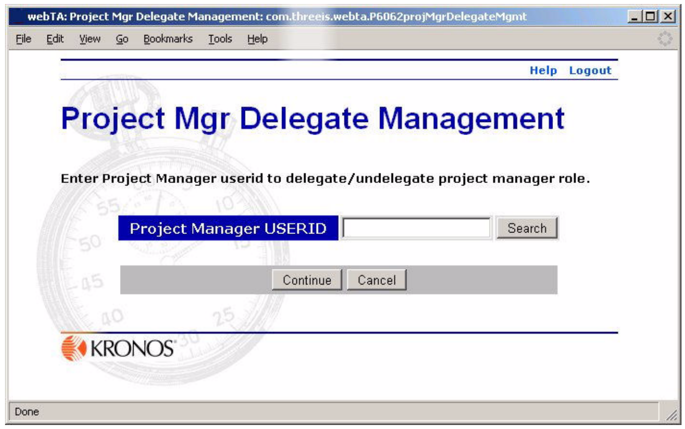
Managing Project Manager delegates

This function lets you assign a project manager delegate to perform the duties of a project manager who is unavailable.

To designate a Project Manager delegate:

1. Click **Roles** on the HR Administrator Main Menu page, then click **Proj. Mgr. Delegate** on the Role Management page.

   The Proj Mgr Delegate Management page opens.



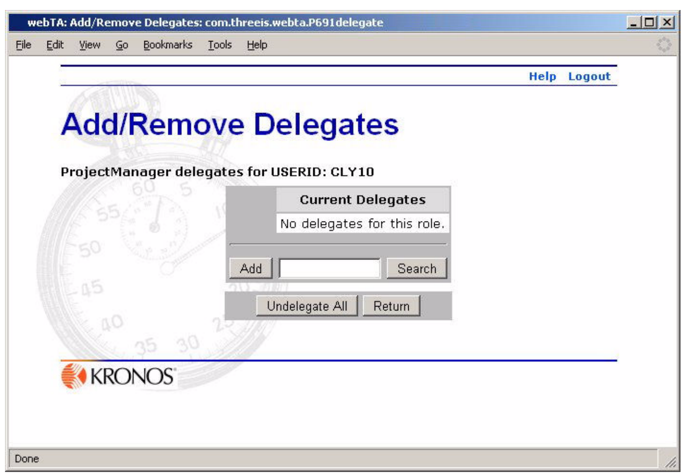
2. Type in the user ID of the Project Manager for whom you are creating a delegate for.

   If necessary, use webTA’s search function.

   If selected from a search, the user ID of the selected Project Manager appears in the **Project Manager USERID** box on the Project Mgr Delegate Management page.

3. Click **Continue.**

   The Add/Remove Delegates page opens.



4. In the box next to the **Add** button, type in the user ID of the person being delegated.

   If necessary, use webTA’s search function.

   If selected from a search, the user ID of the selected employee appears in the **Project Manager USERID** box on the Project Mgr Delegate Management page.

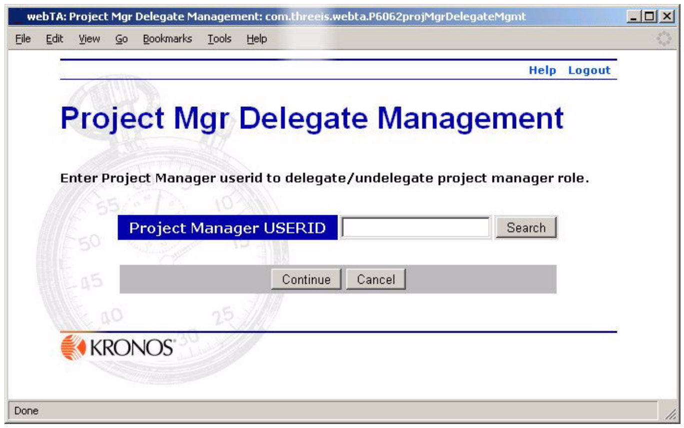
5. Click **Add**.

   The newly delegated Project Manager’s user ID appears in the **Current Delegates** list on the Add/Remove Delegates page.

To remove Project Manager delegates:

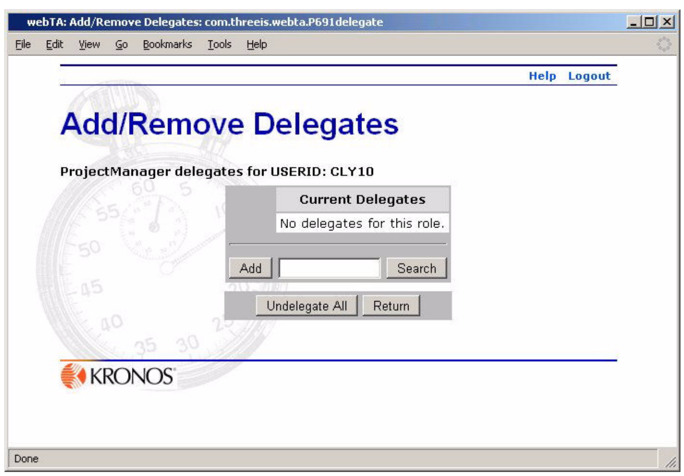
1. Click **Roles** on the HR Administrator Main Menu page, then click **Proj. Mgr. Delegate** on the Role Management page.

   The Project Mgr Delegate Management page opens.



2. Search for and select, or type in the user ID for, the Project Manager for whom you are removing a delegate.
3. Click **Continue.**

   The Add/Remove Delegates page opens.



4. If you want to delete all delegates simultaneously, click **Undelegate All**.

   All delegates are removed from the **Current Delegates** list.

   - OR -

   If you want to delete an individual delegate, from the Current Delegates list, select the delegate you want to remove, then click **Del**.

The delegate you deleted is removed from the Current Delegates list.

Making Timekeeper global changes

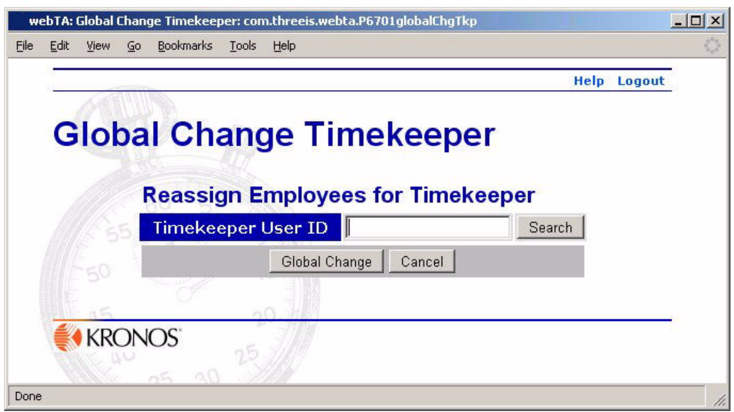
The Timekeeper Global Change function is used to reassign all employees from one Timekeeper to another. Instead of moving each employee to the new Timekeeper, webTA lets you move them all at one time.

Use this function when a Timekeeper leaves an organization or is assigned to other duties.

To make a global Timekeeper change:

1. If you have not already done so, or if the new Timekeeper doesn't already have the appropriate role, give the new Timekeeper the appropriate role on her Employee Profile page.
2. Click **Roles** on the HR Administrator Main Menu page, then click **Change Tkp** on the Role Management page.

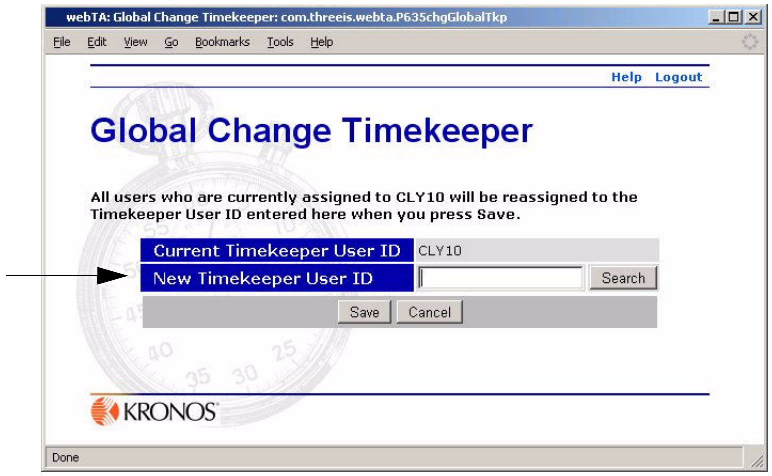
   The Global Change Timekeeper page opens.



3. In the **Timekeeper User ID** box, type in the user ID of the current Timekeeper.

   If necessary, you can search for the Timekeeper's information using webTA's search function.
4. Click **Global Change**.

   The **New Timekeeper User ID** field appears on the page.



5. Type in the new Timekeeper's user ID.

   If necessary, you can search for the Timekeeper's information using webTA's search function.
6. Click **Save**.

Making Supervisor global changes

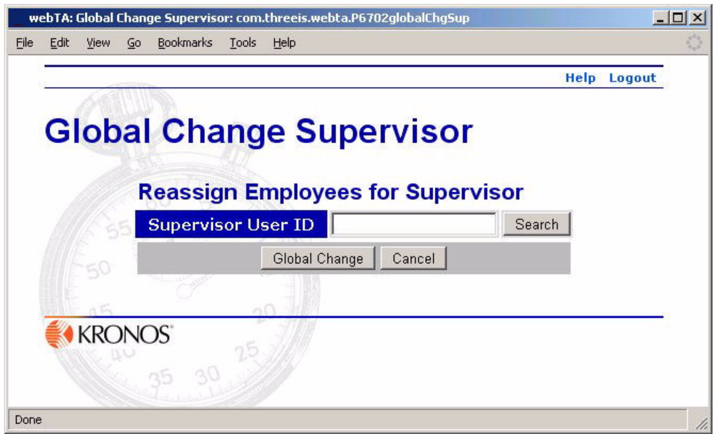
The Supervisor Global Change function lets you reassign employees from one Supervisor to another one. Instead of moving each employee to the new Supervisor, webTA lets you move them all at one time.

Use this function when a Supervisor leaves an organization or is assigned to other duties.

To make a global Supervisor change:

1. If you have not already done so, or if the new Supervisor doesn't already have the appropriate role, give the new Supervisor the appropriate role on the Employee Profile page.
2. Click **Roles** on the HR Administrator Main Menu page, then click **Change Sup.** on the Role Management page.

   The Global Change Supervisor page opens.

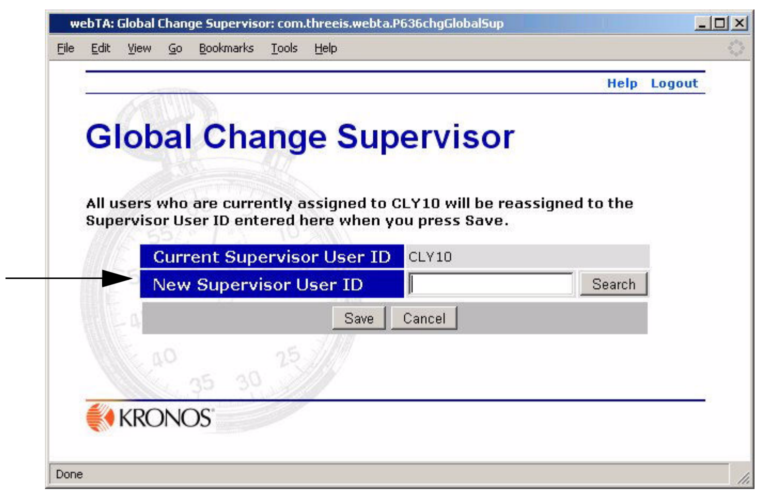


3. In the **Supervisor User ID** box, type in the user ID of the current Supervisor.

   If necessary, you can search for the Supervisor's information using webTA's search function.

4. Click **Global Change.**

   The **New Supervisor User ID** field appears on the page.



5. Type in the new Supervisor's user ID.

   If necessary, you can search for the Supervisor's information using webTA's search function.

6. Click **Save**.

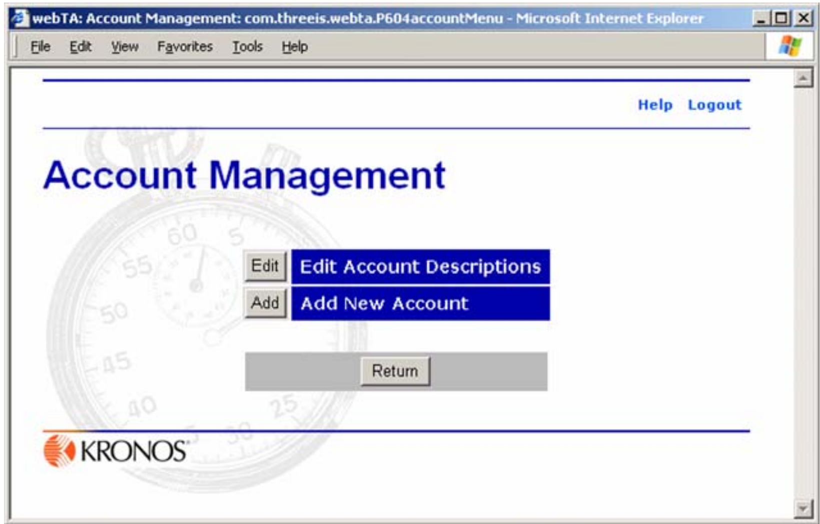
Managing accounts

In webTA, HR Administrators can create new accounts and change account descriptions.

To create a new account:

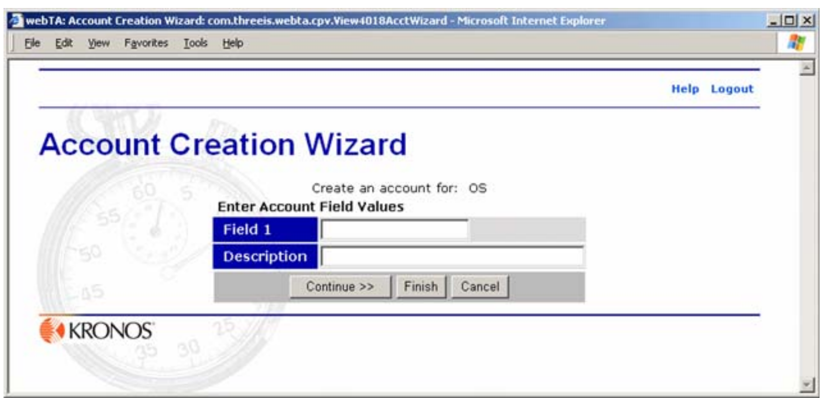
1. On the HR Administrator Main Menu page, click **Accounts**.

   The Account Management page opens.



2. Click **Add**.

   The Account Creation Wizard page opens.



3. Type the new account number in the **Field 1** box, then type a description for the new account in the **Description** box.
4. Click **Continue**.

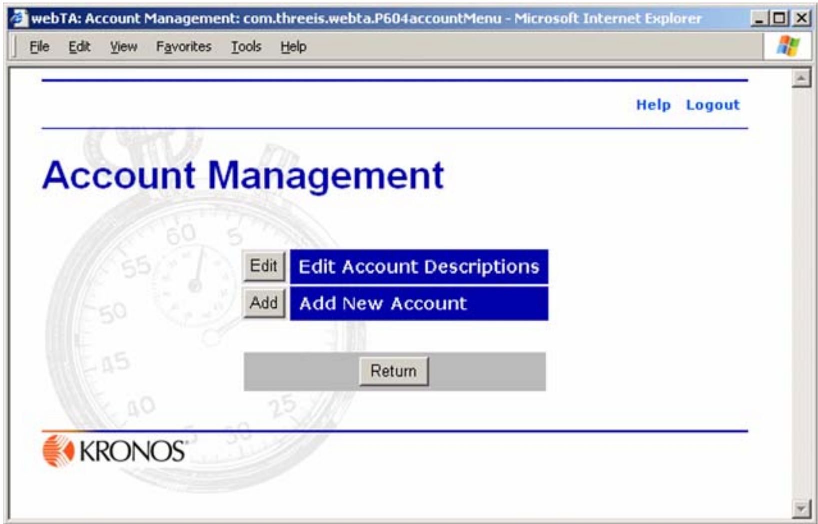
   webTA verifies that the account number conforms with the account structure requirements.
5. Click **Finish**.

   webTA adds the new account to the system.

To change an account description:

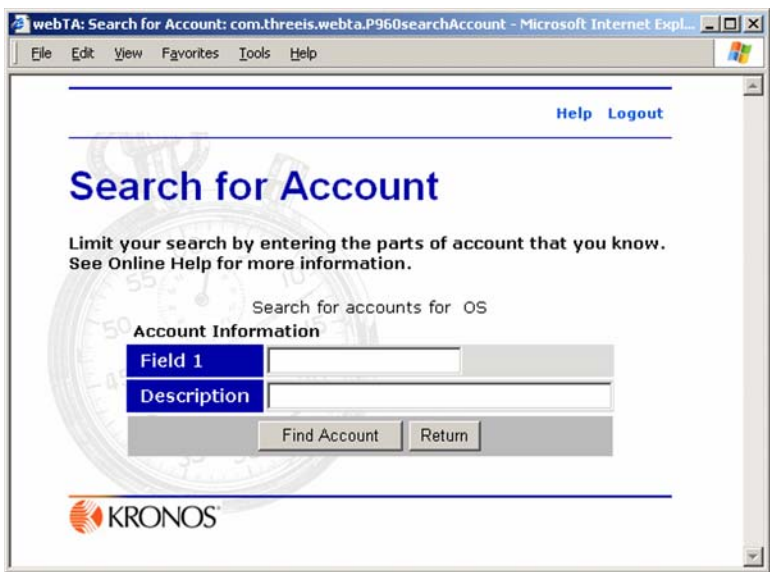
1. On the Timekeeper Main Menu page, click **Accounts**.

   The Account Management page opens.



2. Click **Edit**.

   The Search for Account page opens.



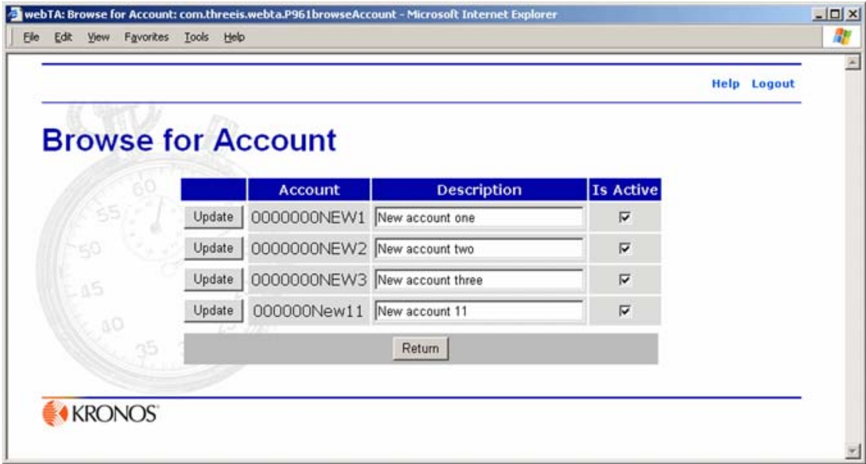
3. Type as much as you know of the account number and description in the **Field 1** and **Description** boxes.

   Note: Typing a partial account number or description will return any accounts whose account numbers or descriptions contain the information you entered. Leaving both boxes empty will return a list of all the accounts available to you.

4. Click **Find Account**.

   The Browse for Account page opens listing all the accounts meeting your search criteria.

   For example, if we type “new” in the description box, all accounts containing the word “new” in their descriptions are listed in the Browse for Account page account list:



5. Change the description of the appropriate account by typing the new description in the Description box, then click **Update**.

   webTA changes the description in the system.

Importing employee data

webTA allows you to import users into the system from transmission files you have previously sent to NFC, which usually have been generated from an application other than webTA.

The import file must be in standard NFC format, optionally with JCL included at the beginning of the file. Any leading JCL is ignored by the import mechanism.

In general, transmission files consist of 80 column lines in blocks of 12 lines. Each block can be a new record or a correction. The webTA import mechanism ignores correction records from the transmission file.

For each user webTA parses from the file, webTA will attempt to create a new user record containing this data:

- Lastname - As parsed from the NFC Name field
- Firstname - As parsed from the NFC Name field
- Middle Name - As parsed from the NFC Name field
- User ID - A user ID will be generated based on the parsed lastname and firstname fields. If the generated user ID already exists, a variation will be chosen, typically by appending numeric characters.
- Password - An initial password will be created for the user which is equal to the first 4 digits of the generated user ID plus the last 4 digits of the SSN field read from the NFC transmission record. If the user ID is less than 4 digits, the password is the entire user ID plus the last 4 digits of the SSN.
- SSN - As read verbatim from the NFC SSN field.

Additionally, when importing the file, webTA will prompt you for a timekeeper ID and a supervisor ID to which the new user will initially be assigned. If you have either the timekeeper or the supervisor roles, this field will be populated with your ID by default. You can change the default value, and you can also reassign the users at any time after they are imported into the system.

In addition to creating the user record, the import mechanism will add a pay record to the system for the user for the current pay period. Because webTA tracks much more data than is contained in the transmission file, it is not possible to create full and accurate records.

IMPORTANT! It is your responsibility to review and correct all records imported into the system prior to using those records.

The following data is parsed from the NFC transmission file and included in the generated pay record. This data can be reviewed on the T&A Profile screen in webTA.

Work Schedule

- Pay Plan
- Tour of Duty
- Duty Hours
- Alternate Schedule

Work Week is not imported.

Contact Point

- Agency
- State code
- Town code
- Unit code
- Timekeeper code

New Contact Point is set to "false."

Overtime/Standby Status

- RSO
- Standby Hrs/Week 1
- Standby Hrs/Week 2
- Standby Percentage

Miscellaneous

- Stored Account (NFC)

Retain Data is set to none

Finally, if leave balances are present in the transmission record, they are imported into the new webTA record as leave forward amounts. These amounts will be correct when importing data from the most recent pay period, as leave balances at the end of the last period become leave forward amounts for the current period.

The following leave fields are imported:

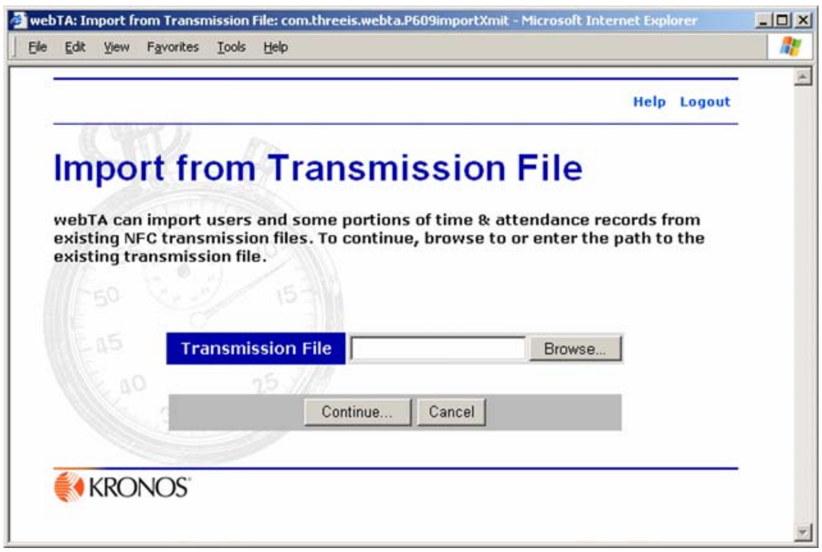
- Annual Leave
- Sick Leave
- Comp Time **See note below**
- Leave Without Pay
- AWOL
- Suspension
- Military Emergency
- Military Regular

Note: The transmission file stores a single field containing the sum of both comp time and religious comp time. When importing this field, webTA places all this time into the comp time field, and none into the religious comp time field.

To import employee data:

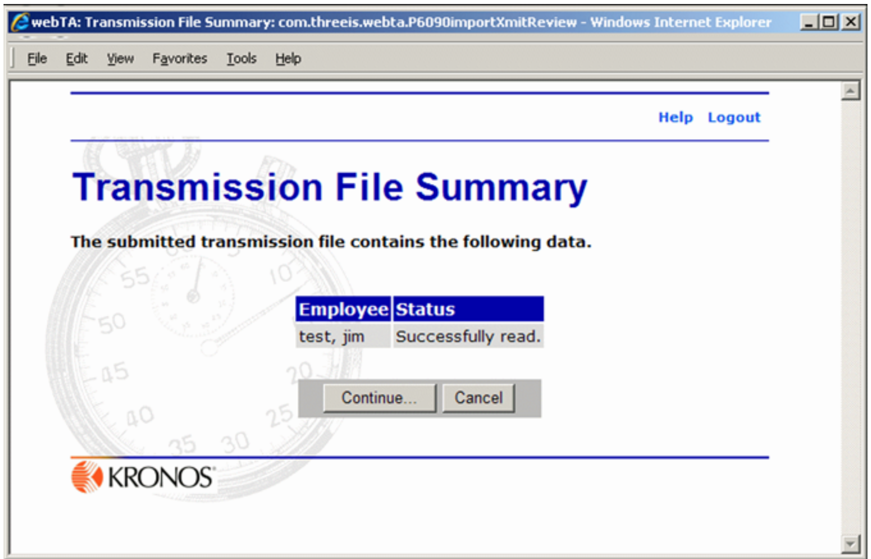
1. On the HR Administrator Main Menu page, click **Import**.

   The Import from Transmission File page opens.



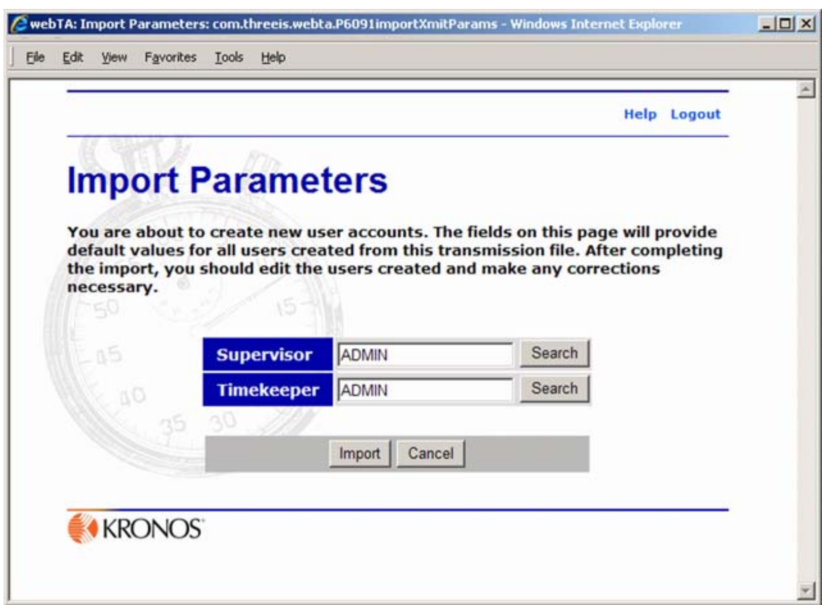
2. Either type the full path and file name of the transmission file or browse for and select the file by clicking Browse.
3. Click **Continue**.

   webTA reads the transmission file and displays the list of employees included in the data set and the status of the record on the Transmission File Summary page.



4. Click **Continue**.

   The Import Parameters page opens.



5. If you want to change the default supervisor or timekeeper assigned to employees associated with the imported data, either type the user IDs in the text boxes or search for and select the appropriate supervisor or timekeeper by clicking **Search**.
6. Click **Import**.

   The Transmission File Import Results page opens listing the results of the import.
7. Click **Done**.

About webTA HR Administrator reports

HR Administrator reports are accessed from the HR Administrator Reports Menu page, which opens when you click **Reports** on the HR Administrator Main Menu page.

You can generate online reports that show the current status of the records in your webTA database for the contact points in your organization.

These reports are available to HR Administrators:

- *Agency Status* shows all records that require additional processing.
- *Employee Assignment by Supervisor* shows which employees are assigned to individual supervisors in the HR Administrator's organization.
- *Employee Assignment by Timekeeper* shows which employees are assigned to individual Timekeepers in the HR Administrator's organization.
- *Active T&A* shows all active employees that meet criteria that you set.
- *Timekeeper, Supervisor, HR Administrator by Organization Code* shows which employees are assigned to which organizations.
- *User Role* shows an organization's employees by selected role.
- *Final Timecards* lists employee's names, user IDs, SSNs (if configured), Timekeeper's IDs, and Supervisor's IDs for employees with finalized timecards.

- *New Employee* lists new employee’s names, user IDs, SSNs (if configured), Timekeeper's IDs, and Supervisor's IDs for employee new to the system. (An employee is considered new until one of their timecards is included in a build.)
- *T&A Summary* summarizes all T&A Summaries matching criteria that you set.
- *Uncertified Timecards* lists employee names, and their user IDs, SSNs (if configured), Timekeeper's IDs, and Supervisor's IDs, if the employee's timecard has not been certified.
- *Unvalidated Timecards* lists all unvalidated T&A for employees assigned to you.
- *FESI Extract for Agency* provides a downloadable FESI file containing built T&A records for a specified pay period range.

Access reports by clicking **Reports** on the HR Administrator Main Menu page, then clicking the appropriate button for the report.

The View Agency Status report

The agency status report outlines the current state of webTA for a given agency, and displays the state of all records for a specified pay period range. It can be used to quickly identify the timekeepers who are responsible for completing the T&A reports.

HR Administrators can generate the report only for their organizations. If HR Administrators do not have their organizations set, the report will be empty.

The Agency Status Report generates a line for each Timekeeper in the system that includes incompletely processed records for pay periods that have ended. If there are no records in the report, all records have been fully processed.

The report shows what records have not been verified, certified, or built for the most recently ended pay period. Note that a single Timekeeper may show up in the list more than one time if that Timekeeper is assigned employees from different contact points or organizations. (Generally this should not be the case.)

The report appears in pay period order. Other information included in the report is organization and contact point information (Agency, State, Town, Unit and Timekeeper). It displays how many employees are under that Timekeeper and then the number of records for that Timekeeper that are validated, certified and built. Records that do not fall under these categories are listed as pending.

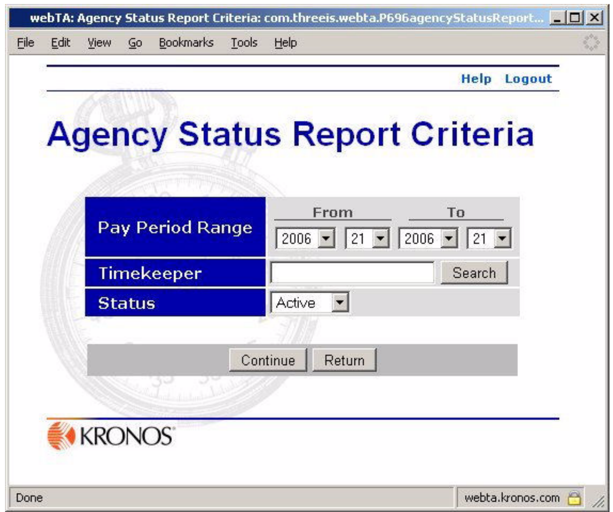
If this report is run near the end of the pay period, the results are limited to corrected T&A records in the system because the report shows the status for the most recently ended pay period. In the second week of a pay period there should be no regular T&A records for the most recently ended pay period in the database. Therefore, the report should show very few records.

To generate the View Agency Status report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.
2. Click **Status**

   The Agency Status Report Criteria page opens.

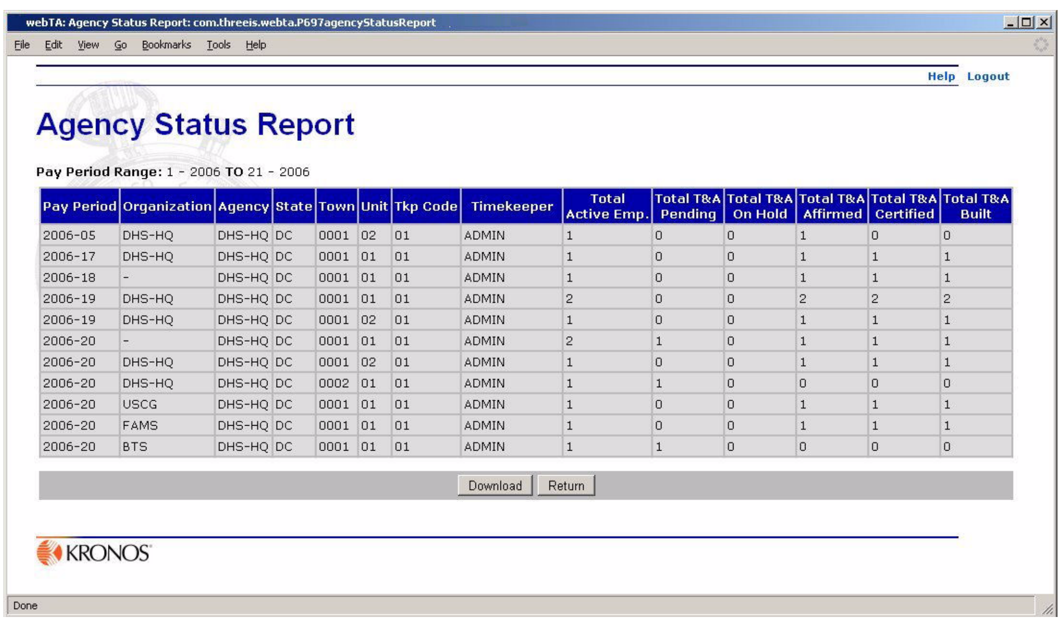


3. Select the beginning and ending dates for the pay period range and the status you want the report to be generated for.
4. If you want the report to be generated for all Timekeepers in your agency, click **Continue**.

   \- OR -

   If you want to limit the results to a particular Timekeeper, type in the Timekeeper's user ID or search for and select the Timekeeper, then click **Continue**.

   The generated status report opens.



Pay Period	Organization	Agency	State	Town	Unit	Tkp Code	Timekeeper	Total Active Emp.	Total T&A Pending	Total T&A On Hold	Total T&A Affirmed	Total T&A Certified	Total T&A Built
2006-05	DHS-HQ	DHS-HQ	DC	0001	02	01	ADMIN	1	0	0	1	0	0
2006-17	DHS-HQ	DHS-HQ	DC	0001	01	01	ADMIN	1	0	0	1	1	1
2006-18	-	DHS-HQ	DC	0001	01	01	ADMIN	1	0	0	1	1	1
2006-19	DHS-HQ	DHS-HQ	DC	0001	01	01	ADMIN	2	0	0	2	2	2
2006-19	DHS-HQ	DHS-HQ	DC	0001	02	01	ADMIN	1	0	0	1	1	1
2006-20	-	DHS-HQ	DC	0001	01	01	ADMIN	2	1	0	1	1	1
2006-20	DHS-HQ	DHS-HQ	DC	0001	02	01	ADMIN	1	0	0	1	1	1
2006-20	DHS-HQ	DHS-HQ	DC	0002	01	01	ADMIN	1	1	0	0	0	0
2006-20	USCG	DHS-HQ	DC	0001	01	01	ADMIN	1	0	0	1	1	1
2006-20	FAMS	DHS-HQ	DC	0001	01	01	ADMIN	1	0	0	1	1	1
2006-20	BTS	DHS-HQ	DC	0001	01	01	ADMIN	1	1	0	0	0	0

5. If you want to open the report in Microsoft® Excel, click **Download**, click to select **Open with Microsoft Excel**, then click **OK**.

   \- OR -

If you want to download the report in Microsoft Excel .XLS format, click to select **Save to Disk**, then click **OK**.

The Employee Assignment by Supervisor report

The Employee Assignment by Supervisor report lists the names of supervisors and their corresponding employees.

The report is generated for the complete pay period range that currently exists in webTA. This can be further filtered by specifying a Supervisor and/or an organization.

This report is available to HR Administrator and Administrator roles only. When the report is viewed by the Administrator, it contains all the employees in the system. When the report is viewed by the HR Administrator, results are restricted to the HR Administrator's organization. The organization name is displayed at the top of the report.

NOTE: If the HR Administrator does not have his organization set in his employee profile, then the report will be empty. Similarly, only those employees who have their organizations set in their employee profile will be displayed in the report.

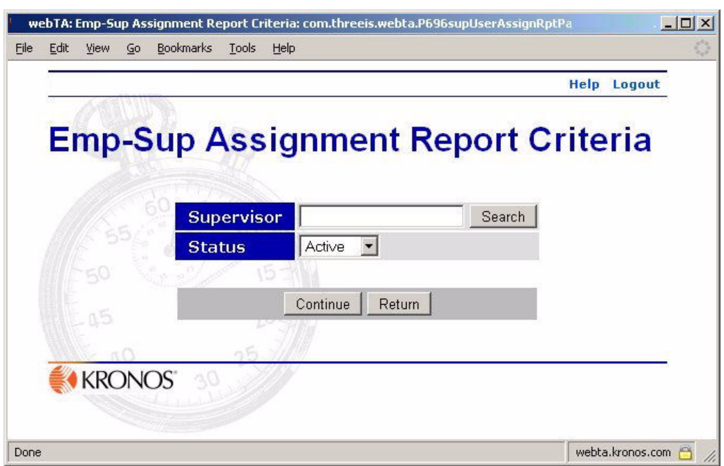
To generate the Employee Assignment by Supervisor report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

2. Click **Emp-Sup**.

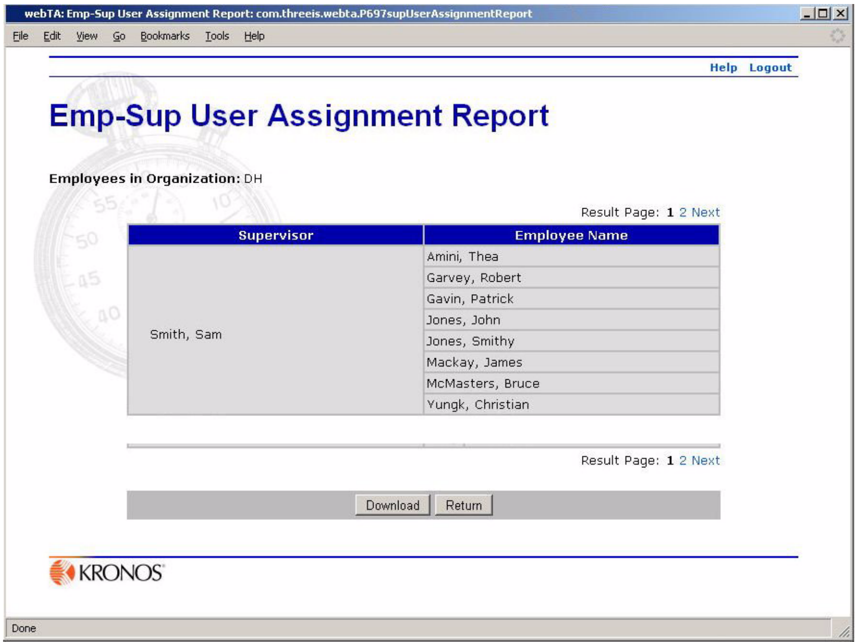
   The Emp-Sup Assignment Report Criteria page opens.



3. Type in the user ID of, or search for and select, the Supervisor whose employee assignments you want to view, then select the employee status from the **Status** list.

4. Click **Continue**.

   webTA generates the Emp-Sup User Assignment Report



5. If you want to open the report in Microsoft® Excel, click **Download**, click to select **Open with Microsoft Excel**, then click **OK**.

   - OR -

   If you want to download the report in Microsoft Excel .XLS format, click to select **Save to Disk**, then click **OK**.

The Employee Assignment by Timekeeper report

The Employee Assignment by Timekeeper Report lists the names of the Timekeepers and their corresponding employees. The report is generated for the complete pay period range that currently exists in webTA. The report can be further filtered by specifying a Timekeeper and/or an organization.

This report is available to HR Administrator and Administrator roles only. When the report is viewed by the Administrator, it contains all the employees in the system. When the report is viewed by the HR Administrator, results are restricted to the HR Administrator's organization only. The organization name is displayed at the top of the report.

The report is generated for the complete pay period range that currently exists in webTA. The report can be further filtered by specifying a Supervisor or Timekeeper.

An HR Administrator can generate the report for his organization only. If HR Administrator does not have his organization set, the report will contain only employees with no organization set.

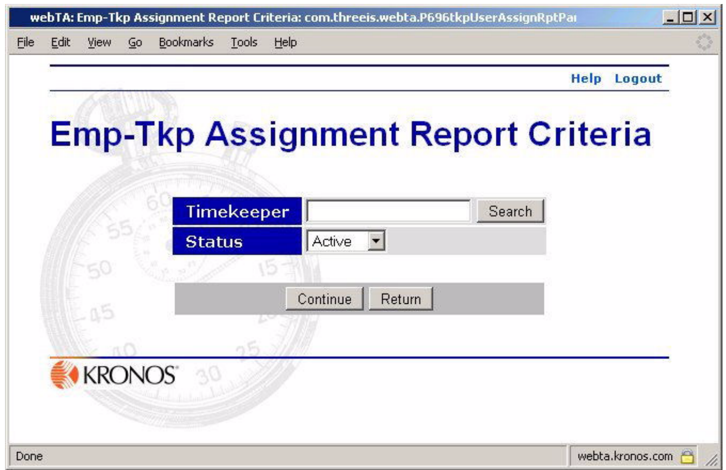
To generate the Employee Assignment by Timekeeper report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

2. Click **Emp-Tkp**.

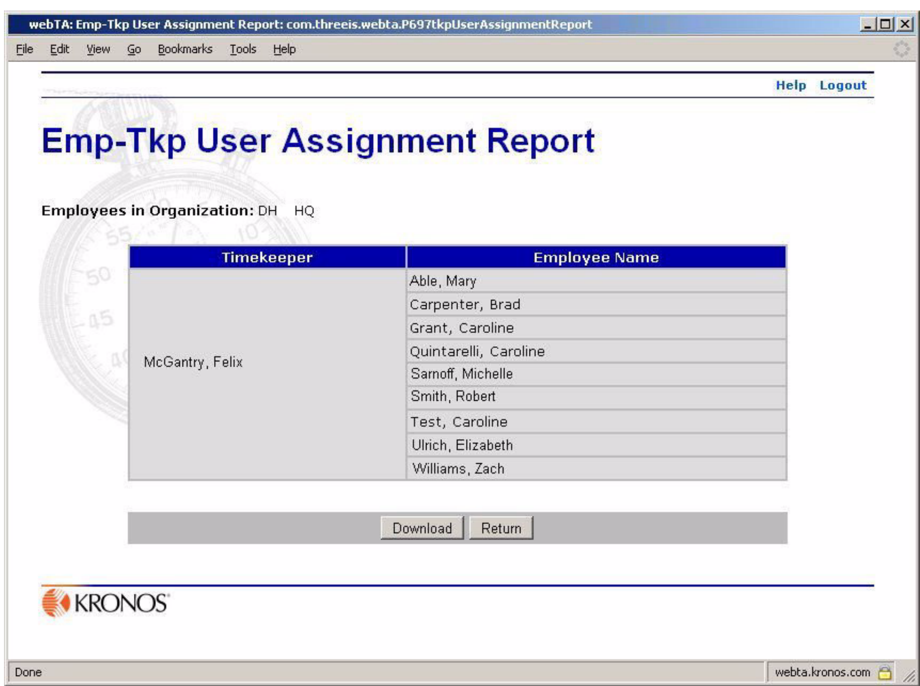
   The Emp-Tkp Assignment Report Criteria page opens.



3. Type in the user ID of, or search for and select the Timekeeper whose employee assignments you want to view, and select the employee status from the **Status** list.

4. Click **Continue**.

   webTA generates the Emp-Tkp User Assignment report.



5. If you want to open the report in Microsoft® Excel, click **Download**, click to select **Open with Microsoft Excel**, then click **OK**.

   \- OR -

If you want to download the report in Microsoft Excel .XLS format, click to select **Save to Disk**, then click **OK**.

The Active T&A report

This report lists the current T&A status for all employees in an HR Administrator's agency. This report only returns the currently active T&As. Results can be filtered by pay period, user ID, unit code, status, and state.

The Timekeeper, Supervisor, HR Administrator by Organization report

This report lists employees possessing Timekeeper, Supervisor, or HR Administrator roles according to their organizations within the agency, and also lists all employees assigned to these roles under that organization.

The report lists the organization code in the first column, the name of the employee having the selected role in the second column, and their user ID in the third column.

When the report is viewed by HR Administrator, results are restricted to the HR Administrator's organization only. The organization name will be displayed at the top of the report.

Only those employees who have their organizations set in their employee profile are displayed in the report.

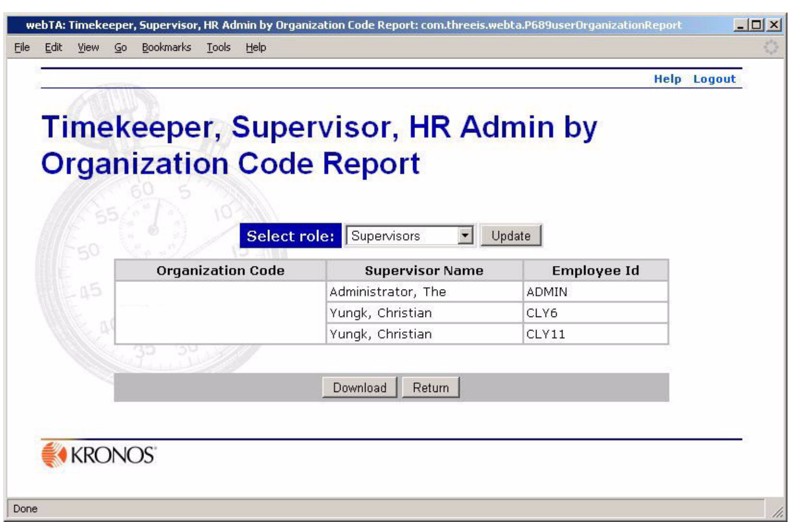
To generate the Timekeeper, Supervisor, HR Admin by Organization Code report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

2. Click **User Orgs**.

   The Timekeeper, Supervisor, HR Admin by Organization Code Report page opens.



3. If you want to open the report in Microsoft® Excel, click **Download**, click to select **Open with Microsoft Excel**, then click **OK**.

   - OR -

   If you want to download the report in Microsoft Excel .XLS format, click to select **Save to Disk**, then click **OK**.

The User Role report

This report lists employees by role, and can be further filtered by organization and subordinate organization.

The report lists, by column, employees' names, user IDs, agencies, and organizations.

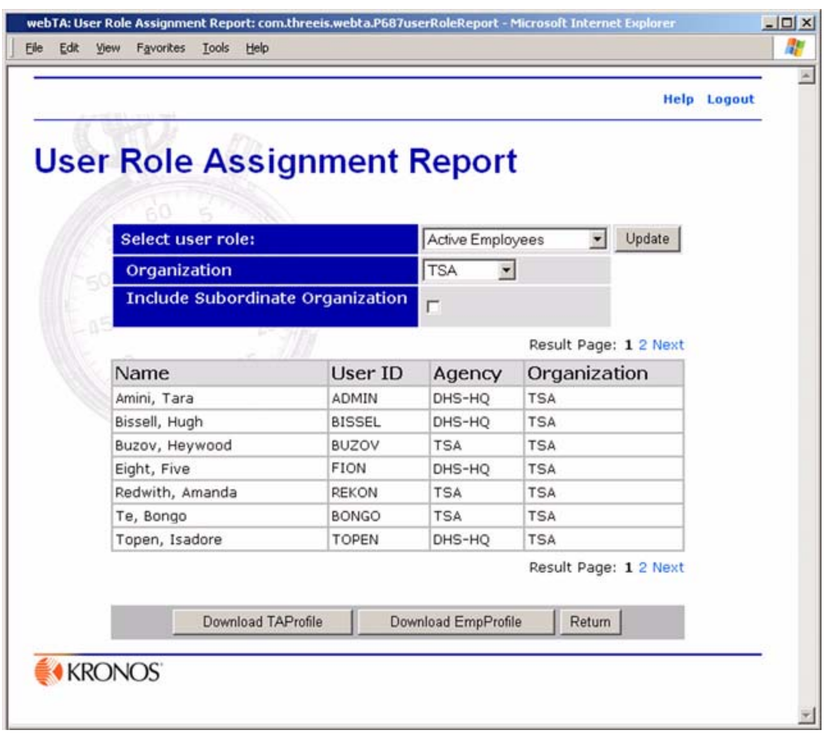
To generate the User Role report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

2. Click **User Role**.

   The User Role Assignment report opens.



3. If you want to view a list of T&A profiles, click **Download TAProfile**, click to select **Open**, then click **OK**.

   - OR -

If you want to save a list of T&A profiles in Microsoft Excel .XLS format, click **Download**, click **Save**, navigate to the location where you want to save the file, then click **OK**.

4. If you want to view a list of employee profiles, click **Download TAProfile**, click to select **Open**, then click **OK**.

   - OR -

   If you want to save a list of employee profiles in Microsoft Excel .XLS format, click **Download**, click **Save**, navigate to the location where you want to save the file, then click **OK**.

Finalized Timecards report

The Finalized Timecards report lets HR Administrators check the status of a particular Timekeeper's set of employee time cards for employees who are doing their final T&A (that is, they are retiring or have otherwise permanently left the organization.) These employees have **Is Final** checked on their T&A Profiles.

The report includes the Timekeeper's name, and total number of active employees. It also shows Total T&A Pending, On Hold, Affirmed, Certified, and Built for those employees, within the designated pay period.

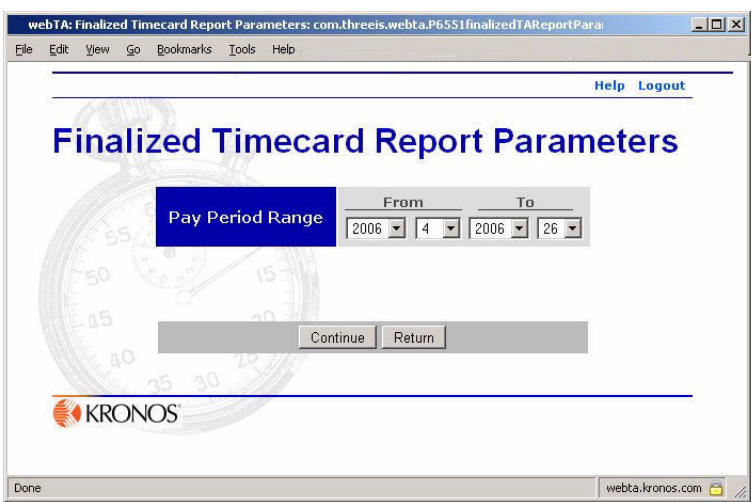
To generate the Finalized Timecards report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

2. Click **Final T&As**.

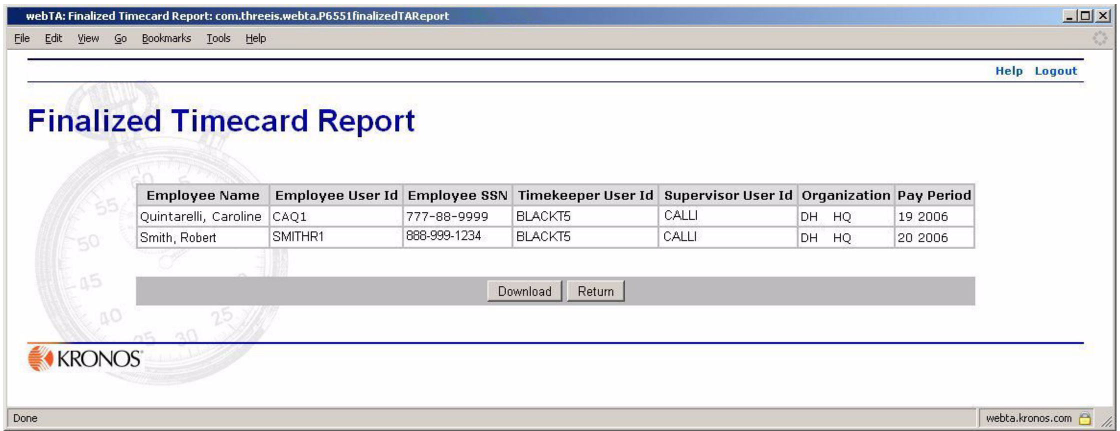
   The Finalized Timecard Report Parameters page opens.



3. Define the range of the report by selecting the beginning and ending pay periods for the report from the **From** and **To** lists.

   Click **Continue**.

4. The Finalized Timecard Report opens listing employees with finalized time cards for the range of pay periods you selected.



5. If you want to download the report in Microsoft® Excel .XLS format, click to select **Save to Disk**, then click **OK**.

The New Employee report

The New Employee report lists the names of the employee new to the system, their user ID, their SSN (if configured), their Timekeeper's ID, and their Supervisor's ID. (An employee remains new until one of their time cards is included in a build.)

IMPORTANT! New Employee report results include only those employees who have been assigned to a requesting HR Administrator’s organization.

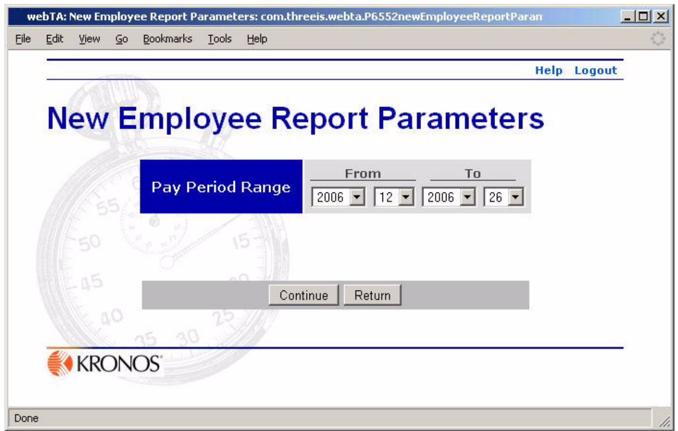
To generate the New Employee report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

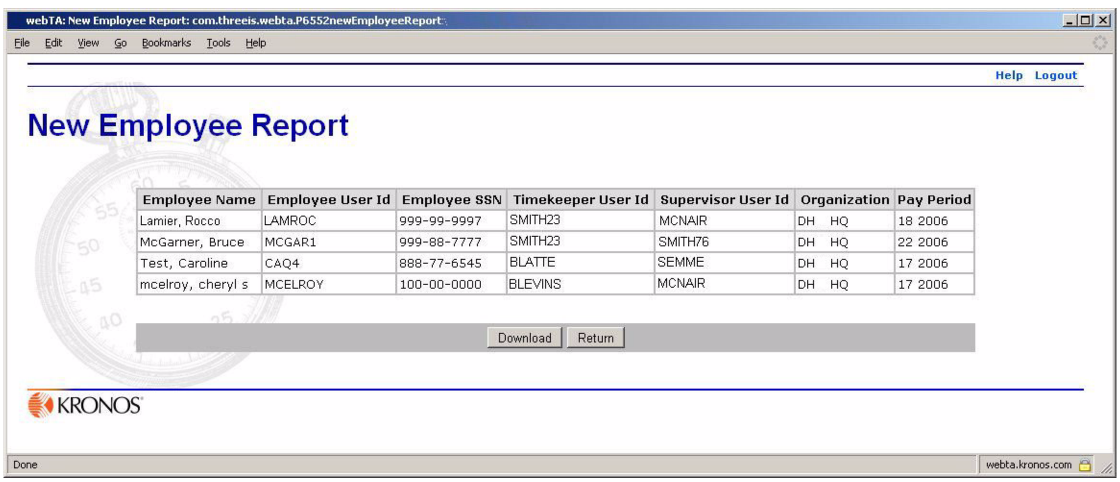
2. Click **New Emps**.

   The New Employee Report Parameters page opens.



3. Define the pay period range you want the report generated for by selecting from the **From** and **To** lists, then click **Continue**.

   The New Employee Report page opens listing the new employees for the pay period range you specified.



4. If you want to open the report in Microsoft® Excel, click **Download**, click to select **Open with Microsoft Excel**, then click **OK**.

   \- OR -

   If you want to download the report in Microsoft Excel .XLS format, click to select **Save to Disk**, then click **OK**.

The Uncertified Timecards report

This report lists employees' names, user IDs, SSNs (if configured), Timekeeper's IDs, and Supervisor's IDs of employees whose time cards have not been certified.

Results are restricted to the HR Administrator's organization.

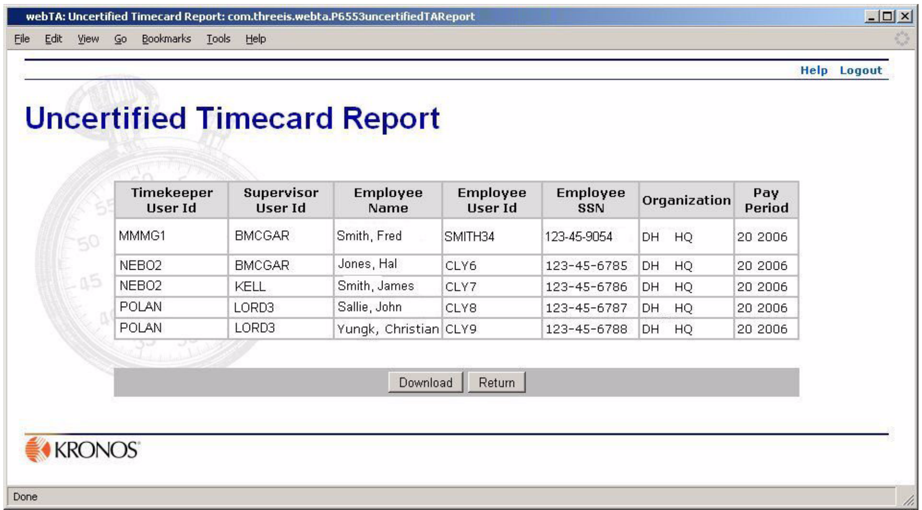
To generate the Uncertified Timecard report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

2. Click **Uncertified T&As**.

   The Uncertified Timecard Report page opens.



3. If you want to open the report in Microsoft® Excel, click **Download**, click to select **Open with Microsoft Excel**, then click **OK**.

   \- OR -

   If you want to download the report in Microsoft Excel .XLS format, click to select **Save to Disk**, then click **OK**.

The Unvalidated Timecards report

This report lists employees' names, user IDs, SSNs (if configured), Timekeeper's IDs, and Supervisor's IDs of employees whose time cards have not been validated.

Results are restricted to the HR Administrator's organization.

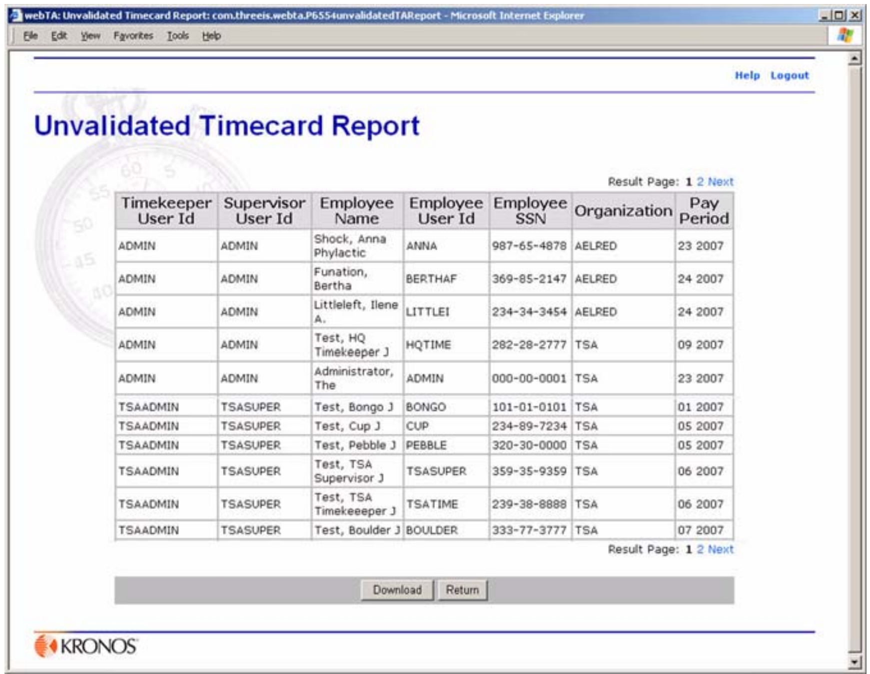
To generate the Unvalidated Timecards report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

2. Click **Unvalidated T&As**.

   The Unvalidated Timecard Report page opens.


webTA: Unvalidated Timecard Report: com.threeis.webta.P6554unvalidatedTAReport - Microsoft Internet Explorer

Help Logout

Unvalidated Timecard Report

Result Page: 1 2 Next

Timekeeper User Id	Supervisor User Id	Employee Name	Employee User Id	Employee SSN	Organization	Pay Period
ADMIN	ADMIN	Shock, Anna Phylactic	ANNA	987-65-4878	AELRED	23 2007
ADMIN	ADMIN	Funation, Bertha	BERTHAF	369-85-2147	AELRED	24 2007
ADMIN	ADMIN	Littleleft, Ilene A.	LITTLEI	234-34-3454	AELRED	24 2007
ADMIN	ADMIN	Test, HQ Timekeeper J	HQTIME	282-28-2777	TSA	09 2007
ADMIN	ADMIN	Administrator, The	ADMIN	000-00-0001	TSA	23 2007
TSAADMIN	TSASUPER	Test, Bongo J	BONGO	101-01-0101	TSA	01 2007
TSAADMIN	TSASUPER	Test, Cup J	CUP	234-89-7234	TSA	05 2007
TSAADMIN	TSASUPER	Test, Pebble J	PEBBLE	320-30-0000	TSA	05 2007
TSAADMIN	TSASUPER	Test, TSA Supervisor J	TSASUPER	359-35-9359	TSA	06 2007
TSAADMIN	TSASUPER	Test, TSA Timekeeeper J	TSATIME	239-38-8888	TSA	06 2007
TSAADMIN	TSASUPER	Test, Boulder J	BOULDER	333-77-3777	TSA	07 2007

Result Page: 1 2 Next

Download Return

KRONOS

3. If you want to view the report, click **Download**, then click **Open**.

   \- OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, click **Save**, navigate to the location where you want to save the file, then click **OK**.

The FESI Extract for Agency report

This report lets HR Administrators view or download a FESI file containing the built T&A records for a specified pay period range. The report includes all records that were built in that range. For example if a correction for pay period 09 of leave year 2005 was built in pay period 15 of the same pay period year, then a search for pay period 15 of leave year 2005 will include this record.

The report covers only those employees belonging to the HR Administrator's agency.

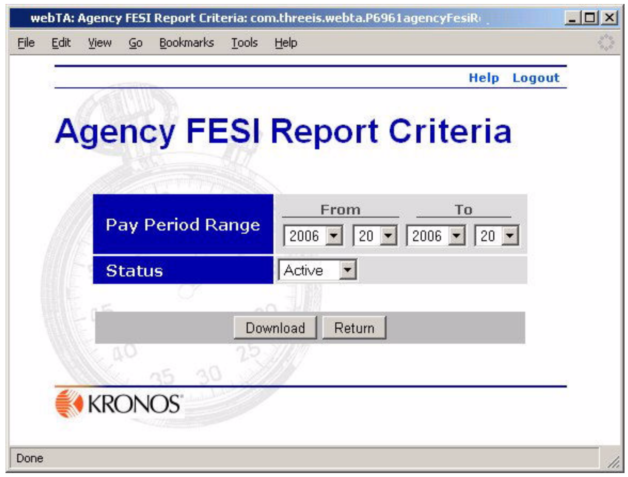
To generate the FESI Extract for Agency report:

1. On the HR Administrator Main Menu page, click **Reports**.

   The HR Administrator Reports Menu page opens.

2. Click **FESI extract**.

   The Agency FESI Report Criteria page opens.



3. Define the pay period range you want the report generated for by selecting from the **From** and **To** lists, select the status of the employees reported on from the **Status** list, then click **Download**.

   A dialog box opens asking you if you want to save the file.

4. Click **Save**.

   Name the file and navigate to the location where you want to save the file.

   IMPORTANT! Make sure you save the file in DAT format.

5. If you want to open the file, select **Open With**, then choose a standard text viewer such as WordPad or Notepad.

   - OR -

   If you want to save the file in .DAT format, click to select **Save to Disk**.