webTA 3.8

USDA HR Administrator’s Guide

Document History

Date	Revision	Description	Author
2/6/09		Draft release	Bruce McGarvey

Contents

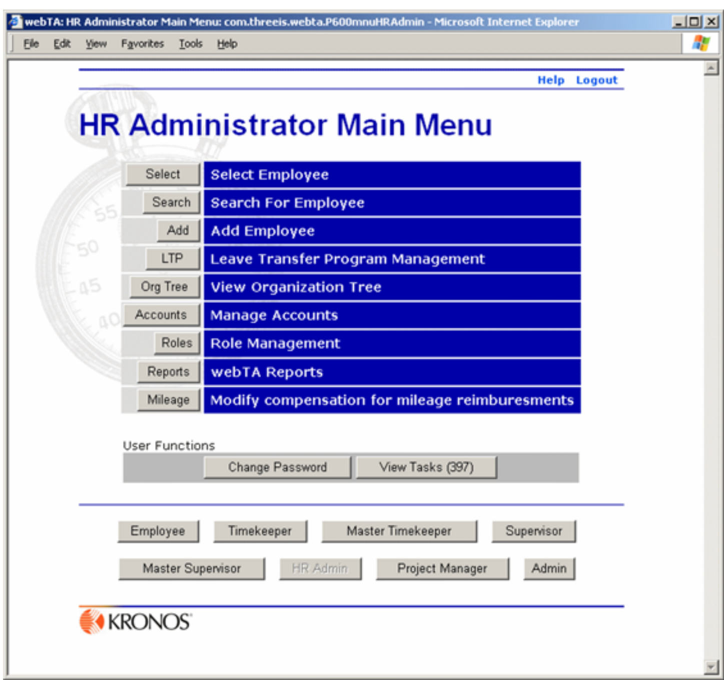
Introduction

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.

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, letting you add and edit employee 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 time cards, and locator information.
- **Search** takes you to pages from which you can search for employees according to criteria that you choose, and modify records for both active and inactive employees.
- **Add** 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:

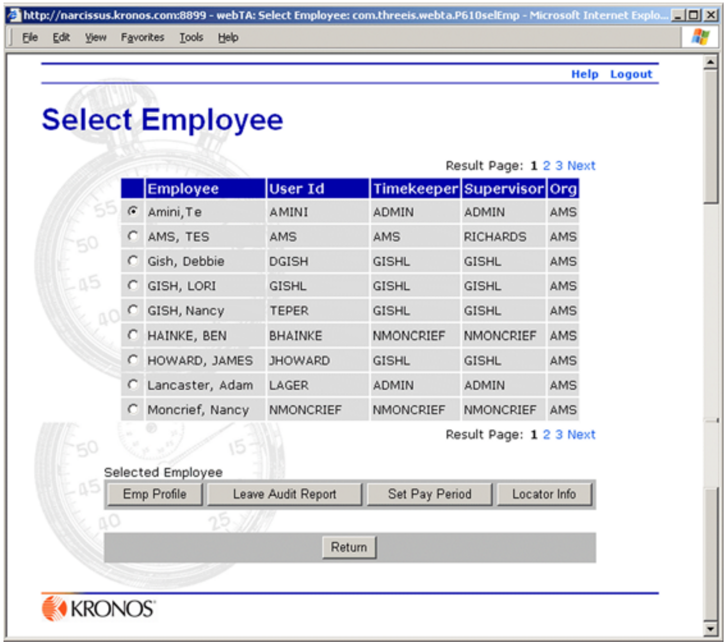
- **LTP** provides access to Leave Transfer Program functions.
- **Org Tree** provides access to functions that let you view a hierarchical list of organizations and sub-organizations.
- **Accounts** gives you access to functions for adding new accounts and adding and editing account descriptions.
- **Roles** lets you view and manage Timekeeper, Supervisor, and Project Manager role delegations and globally change timekeeper and Supervisor employee assignments.
- **Reports** lets you generate reports that show the current status of records in your webTA database for employees in your organization.
- **Mileage** lets you modify the cents/mile rate and the starting pay period for mileage reimbursements.

Selecting employees

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

To select an employee, either search for and select the employee using webTA's search function, as described in the webTA *Basics* guide, or on the HR Administrator Main Menu page, click **Select**.

Selecting from the HR Administrator Main Menu page opens the Select Employee page, which lists all employees in your agency.

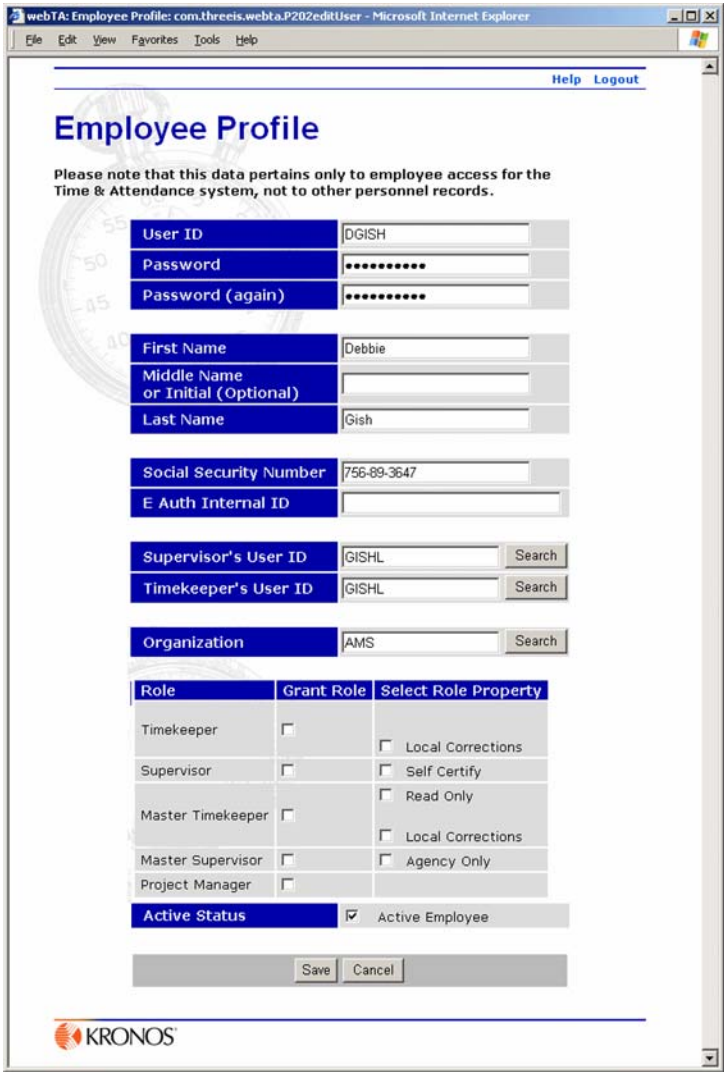


The buttons on the page provide access to various administrative functions:

- **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.)
- **E Auth Internal ID** – The employee's eAuthorization ID.

- **Supervisor's User ID** – The user ID for the employee's supervisor.
- **Timekeeper's User ID** – The user ID for the employee's timekeeper.
- **Organization** – The employee’s organization within the agency.

  By default, the root of the organization tree is the agency.
- **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.

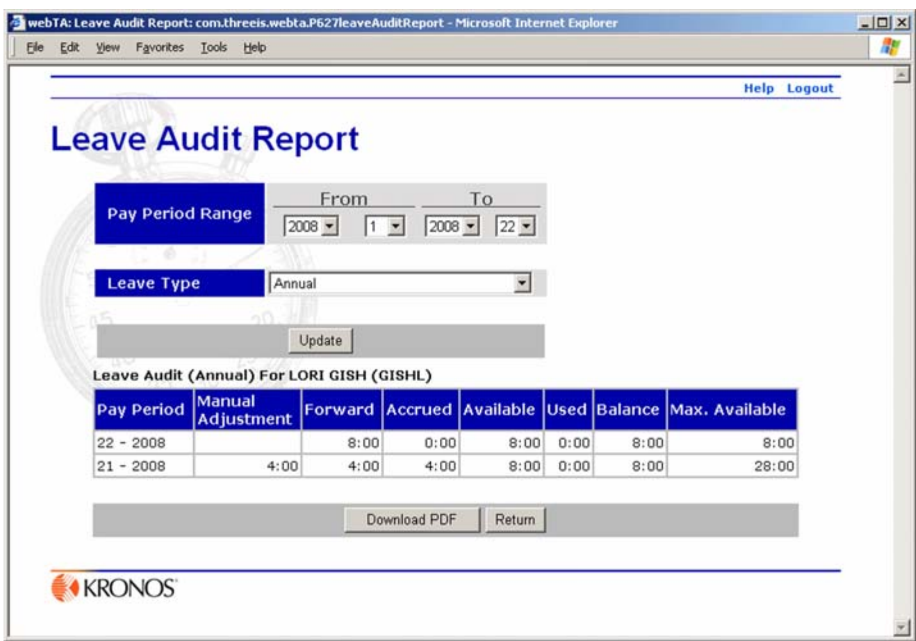
  This box is selected by default when a new employee record is created. See the section “About inactive status” on page 10 for detailed information about status.

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.

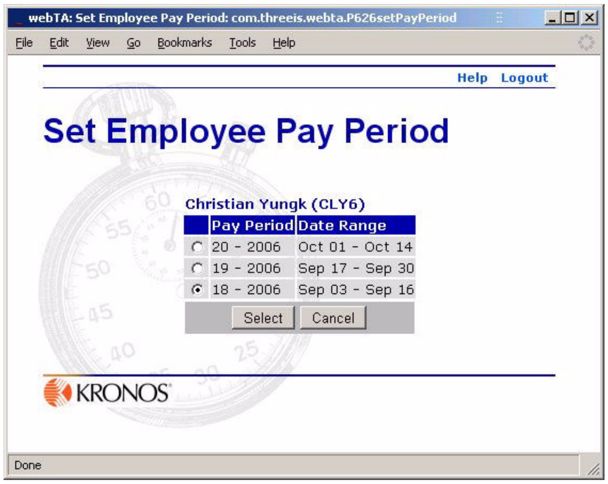
  For leave types that do not accrue, such as AWOL, this column will be blank.
- **Available** contains the total amount of leave available for use in the pay period. This is usually the forwarded amount plus the accrued amount. For leave types that are not accruable, this field is blank.
- **Used** contains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

  This is usually the sum of the time card 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 Adobe .PDF format by clicking **Download PDF** 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 time card.

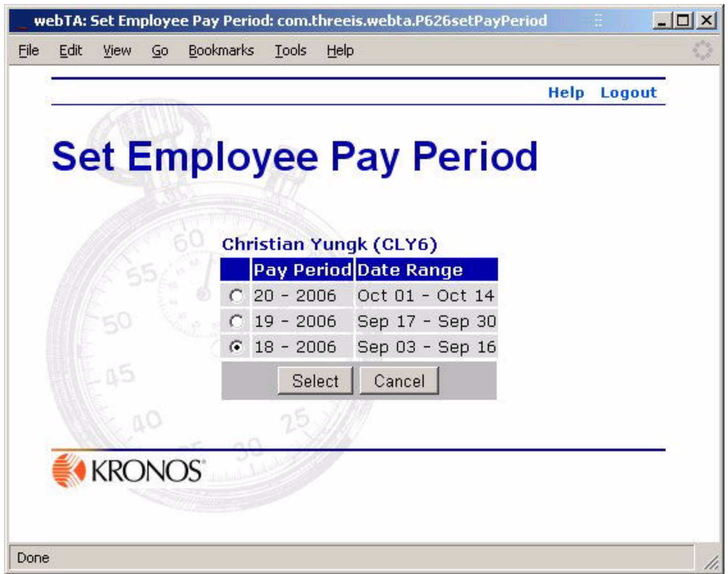
- If the employee's last certified record was the previous pay period, then there will be no choices.
- If the employees last certified pay period was several pay periods before the current pay period, then all of the pay periods between the previously recorded and current pay period are listed.
- If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

The pay period for a certified or corrected time card 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**.

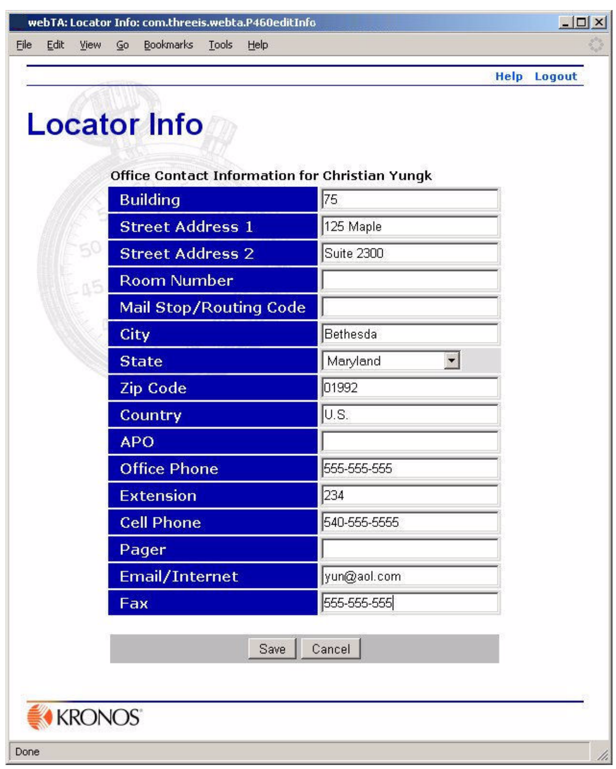
   The Set Employee Pay Period page opens.



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.

To open an employee's Locator Info page:

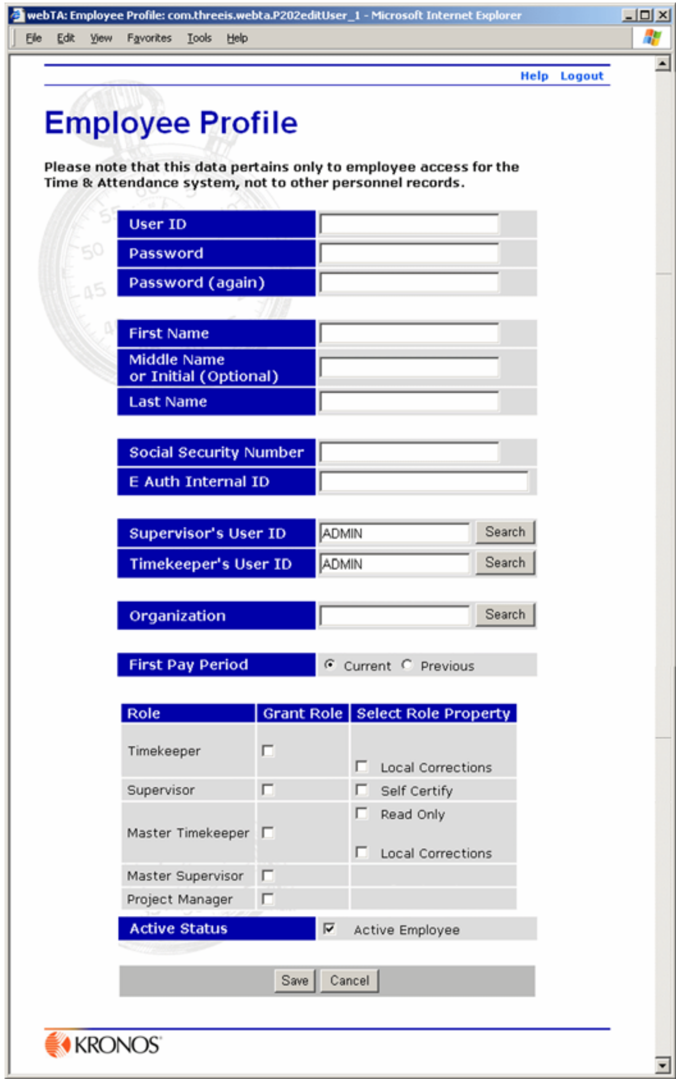
1. Select, or search for and select, the employee whose locator information you want to view.
2. On the Select Employee page, click **Locator Info**.

Adding a new employee

To add a new employee:

1. Click **Add** 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 details about employee profile fields and options, see “About employee profiles” on page 3.

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

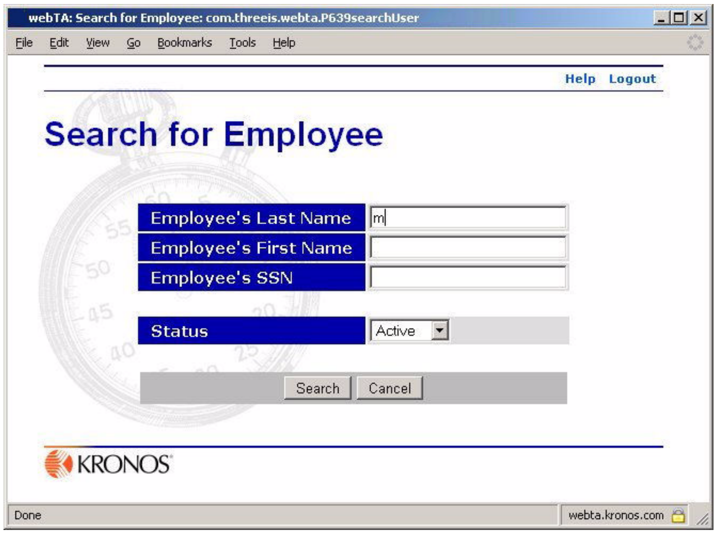
When employees are made inactive, their records remain in the system, but they are no longer able to log into the T&A system, and their records are ignored during verification, certification, and transmission file builds.

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 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.

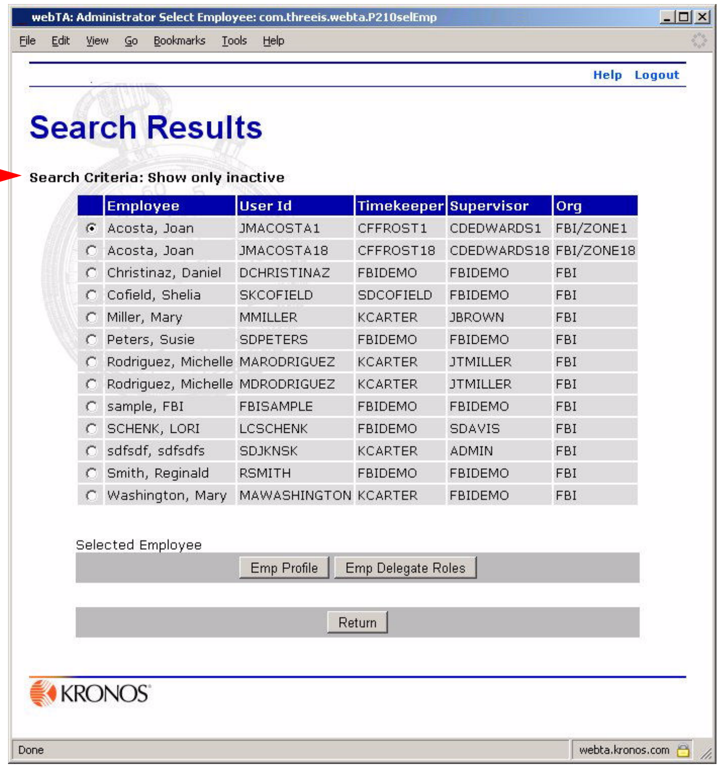
To reactivate an employee:

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. Click to select the **Active Employee** check box.
7. Click **Save**.

About Leave Transfer Program Management

As part of the Leave and Premium Pay Request Module, webTA provides full support to manage your agency’s leave transfer programs.

Three types of leave transfer programs are supported:

- *Emergency Leave* transfer banks are established for specific emergencies.

  Anyone approved to receive leave from the bank may use the leave donated to it. Similar to a Voluntary Leave Transfer Bank, the leave used from the Emergency Leave Transfer Bank affects recipients differently, and puts different limits on the donations that a person can make to the program.

- *Voluntary Leave* transfer banks let employees donate leave to a pool for use by anyone approved as a recipient from the bank.
- *Voluntary Individual Leave* transfer accounts apply to specific employees.

Leave donated to this type of account may only be used by one employee. The primary difference between this type of account and a Voluntary Leave Transfer Bank is that there can only be one approved recipient for each account.

webTA tracks these types of transactions associated with the each account:

- Approved recipients

  For an approved recipient to use donated leave, an "event" must be established for that person. An event has a starting and ending date and a limit on the amount of donated leave the recipient may use.

- Donations to the account

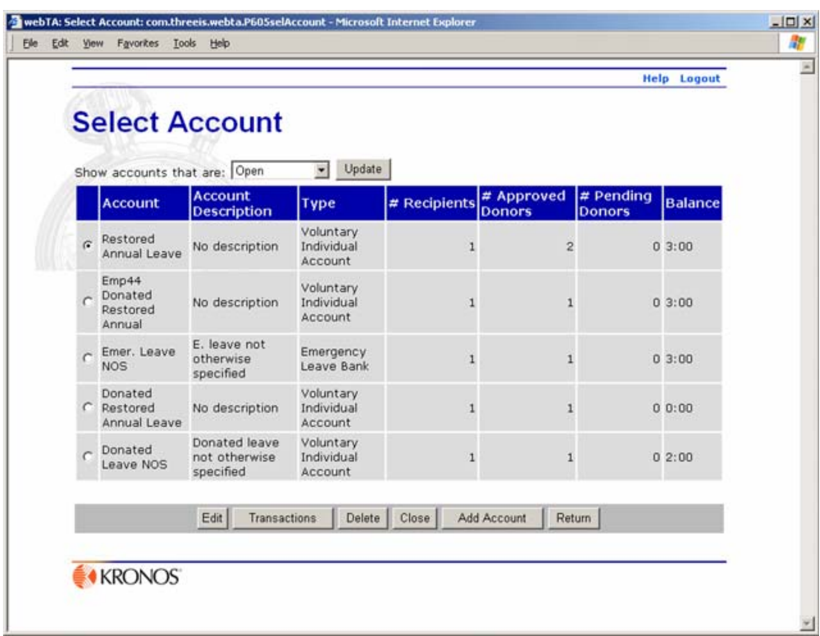
  Donations can be made from within webTA by individuals (with the approval of the HR Administrator), or the HR Administrator can add donations for volunteer donors. Donations received from outside the agency must be entered by the HR Administrator.

- Deductions from the account

  As donated leave is used, webTA generates deduction transactions and adds them to the time card as a leave transaction. Additionally, deductions can be entered to liquidate advanced annual or sick leave balances or leave without pay.

To open the Leave Transfer Program Management page:

1. On the HR Administrator Main Menu page, click **LTP**.
2. The Select Account page opens listing leave accounts.



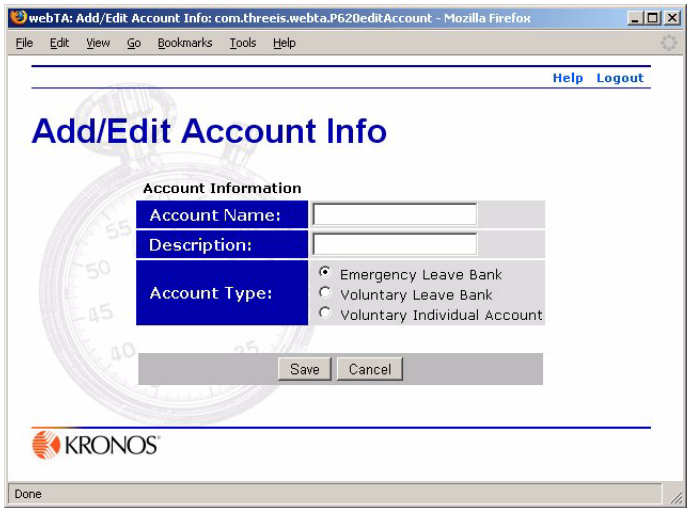
The **Type** column of the Select Account page shows the leave types associated with each account.

Adding accounts

To add an account:

1. Open the Select Account page by clicking **LTP** on the HR Administrator Main Menu page.
2. The Select Account page opens.
3. Click **Add Account**.

   The Add/Edit Account Info page opens.



4. Type the name of the account and a description.

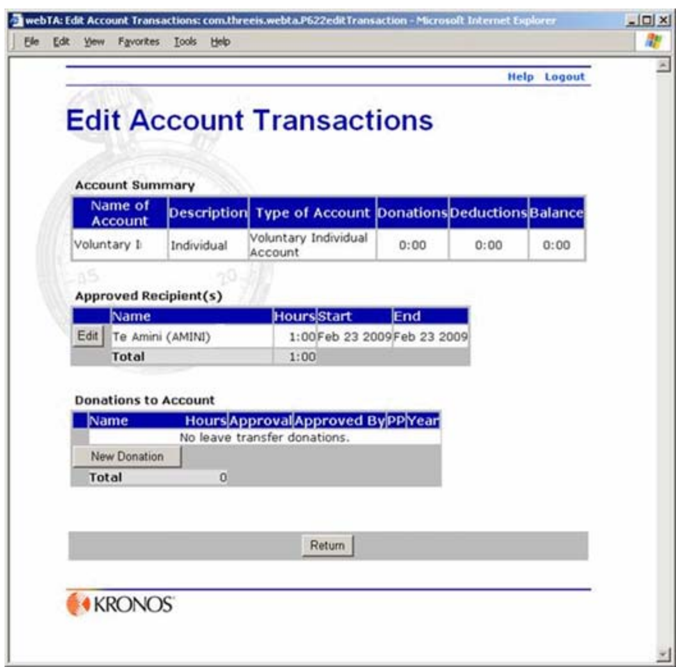
   IMPORTANT! If your agency has a naming convention or has established account numbers for Leave Transfer accounts, use them as the account name.
5. Click to select the type of account being created, then click **Save**.
6. If you are creating either an Emergency Leave Bank or Voluntary Leave Bank account, type in the account name and description, select the account type, and then click Save.

   webTA returns you to the Select Account page, and the new account appears in the Select Account accounts list. Stop here.

   - OR -

   If you are creating a Voluntary Individual Account, the Edit Recipient page opens.

7. Enter the appropriate information in the fields, then click **Save**.
8. The Edit Account Transactions page opens.



9. Click Return.

   webTA returns you to the Select Account page, and the new account appears in the Select Account accounts list.

Once an account has been created, employees can donate leave to it, and recipients who may use the donated leave can be established.

Editing leave transactions

Using webTA leave transactions, you can:

- Add recipients of donated leave
- Edit recipients of donated leave
- Remove recipients of donated leave
- Edit donated leave transactions
- Approve leave donated by other employees
- Add leave donations
- Liquidate advanced leave or LWOP

Account transactions are edited in the Edit Account Transactions page.

Adding a recipient

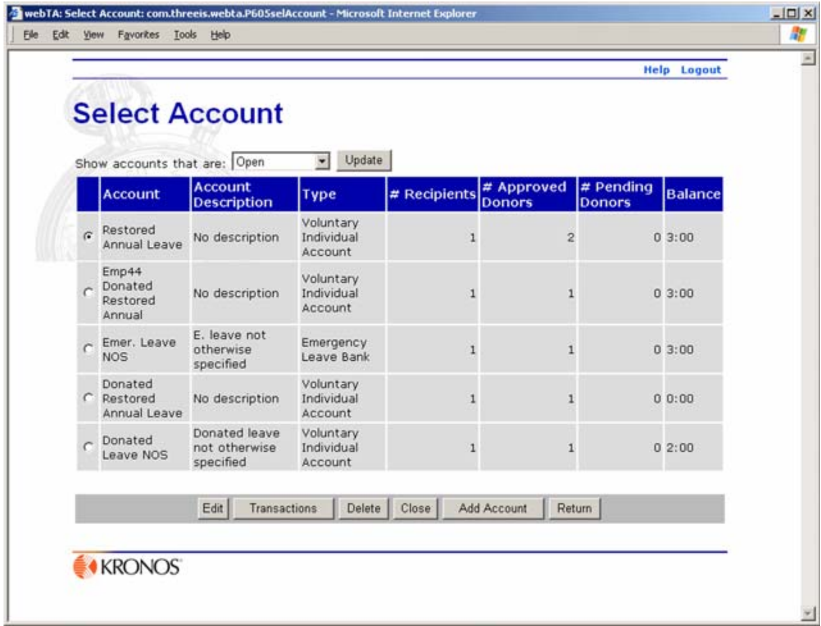
For an approved recipient to use donated leave, an "event" must be created.

- If the recipient is using the leave from a Leave Bank, create the event in an existing Leave Bank account.
- If an Individual Leave Transfer Account is required, create the account and add the recipient to it.

To add a recipient:

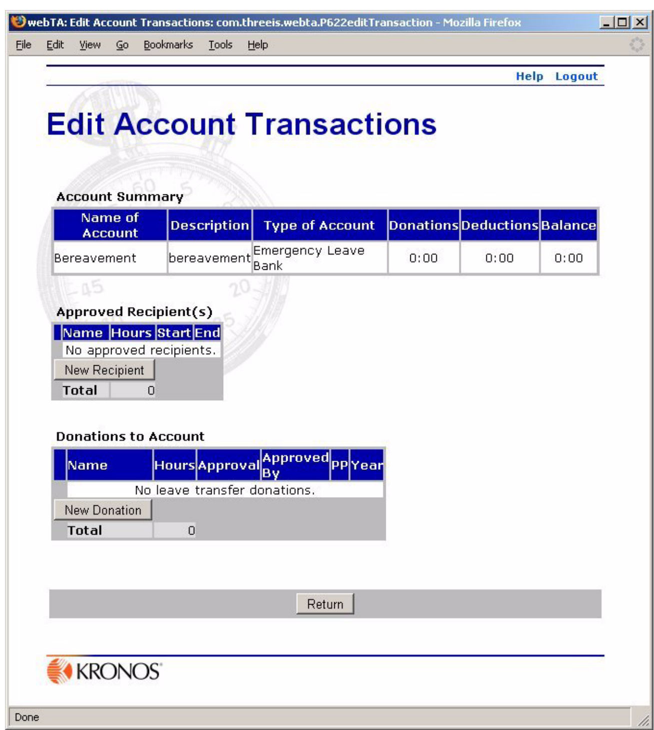
1. Select LTP on the HR Administrator Main Menu page.

   The Select Account page opens.



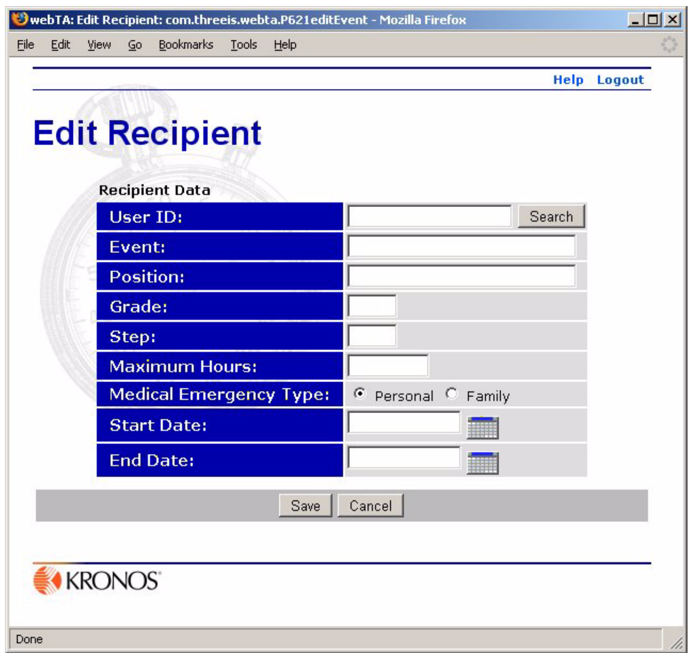
2. On the Select Account page, click to select the account that you want to edit.
3. Click **Transactions**.

   The Edit Account Transactions page opens for the account you selected.



4. Click **New Recipient** in the Approved Recipients section.

The Edit Recipient page opens.



5. Type in the recipient's user ID, or search for it using webTA's search function.

   If you chose to search for the recipient, once you find and select the recipient, webTA automatically enters the recipient's user ID into the **User ID** box

6. Type in the leave recipient information required for reporting, the maximum number of donated hours a recipient may use, and the start and end dates of the event.

   Maximum Hours is the most donated leave that the person is eligible to use, not the amount of leave that has been donated for that event. Until donations have been made to the account and approved by an HR Administrator, the recipient cannot use any hours. The account balance can never be less than zero.

7. When you are finished entering the leave information, click **Save**.

   The Edit Account Transactions window reopens, showing the added recipient.

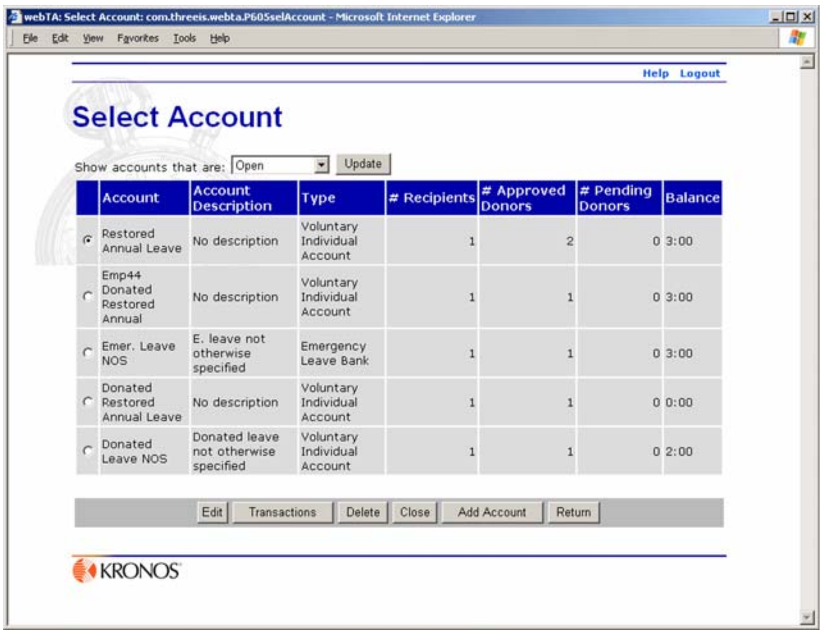
Liquidating advanced leave or LWOP

If there are sufficient donated hours in the account, advanced annual leave, advanced sick leave, or leave without pay may be liquidated for an approved recipient.

The HR Administrator must enter a manual deduction into the account. Deductions cannot be entered that would result in an account balance less than zero. In fact, until there are donations recorded and approved, the Deductions from Account section of the Transactions page will not be visible.

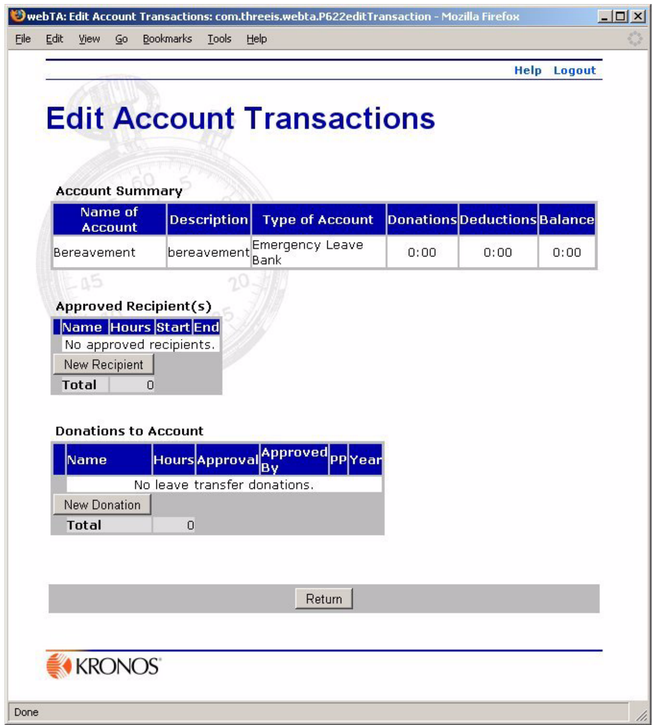
To liquidate leave:

1. On the HR Administrator Main Menu page, click **LTP**.
2. The Select Account page opens.

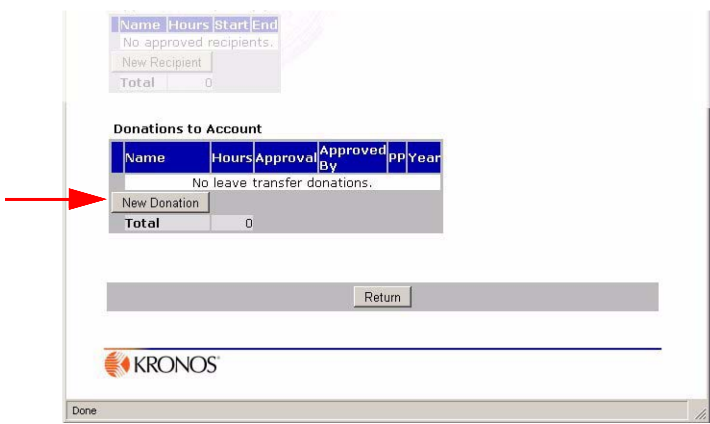


3. Click to select the appropriate account, then click **Transactions**.

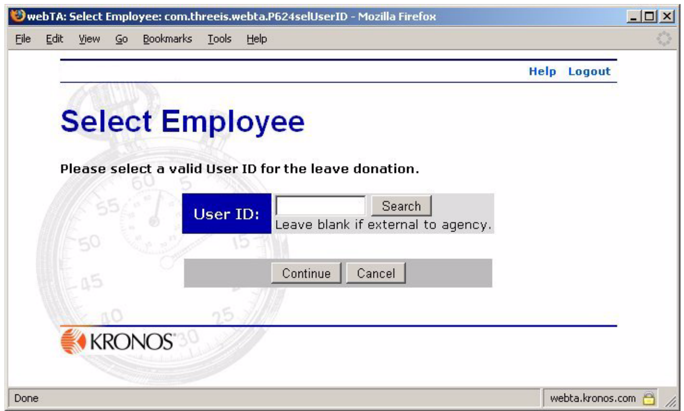
   The Edit Account Transactions page for the selected account opens.



In the Donations from Account section, click **New Donation**.

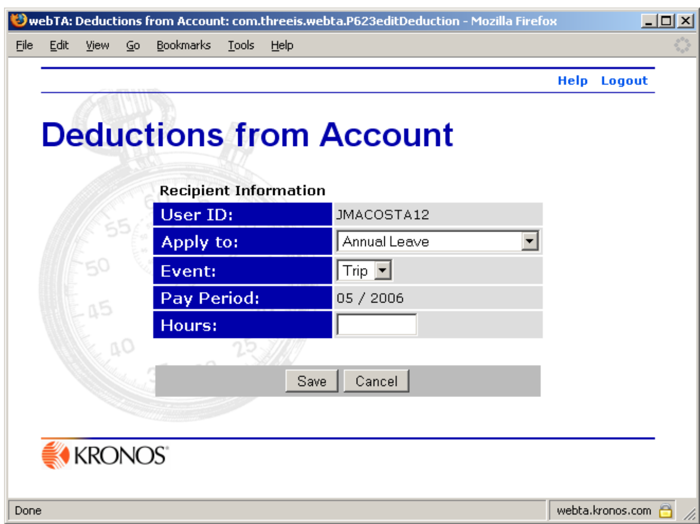


The Select Employee page opens.



4. Type in, or search for and select, the recipient's user ID, then click **Continue**.

   The Deductions from Account page opens for the employee you selected.



5. Select the type of leave being liquidated, the event to which to apply the donated leave, and the number of hours.
6. Click **Save.**

   webTA checks to make sure that the number of hours does not exceed the available balance or the maximum number of hours approved for the recipient's event, and returns to the Edit Account Transactions page.

About donations to Leave Transfer accounts

Employee donations to leave transfer accounts can either be entered by the donating employee through the Leave/Premium Pay section on the Employee Main menu or it can be entered by an HR Administrator from the Edit Account Transactions page. Either way, the donation must be approved by an HR Administrator before it can be used by an approved recipient.

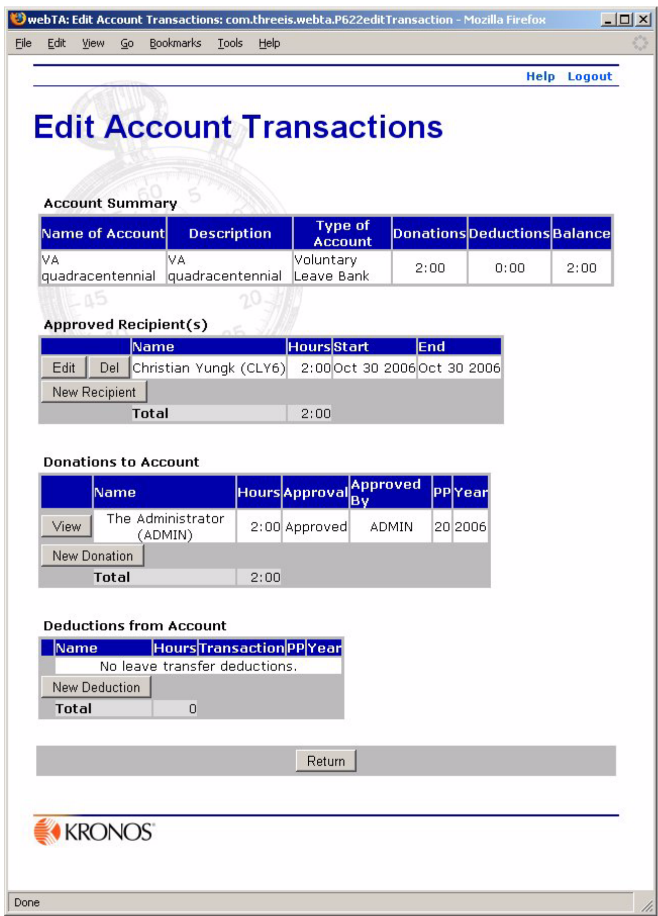
A recipient cannot use donated leave after the end of the event. The end date of the event may be extended and its maximum hours increased by editing the event record.

The HR Administrator may add donations on behalf of employees, both from within the agency or from external sources.

To add a donation:

1. Open the Select Account page by clicking **LTP** on the HR Administrator Main Menu page.
2. Select an account on the Select Account page.
3. Click **Transactions**.

   The Edit Account Transactions page opens.



4. In the **Donations to Account** section, click the **New Donation** button for the account you want to add a donation to.

   The Select Employee page opens.

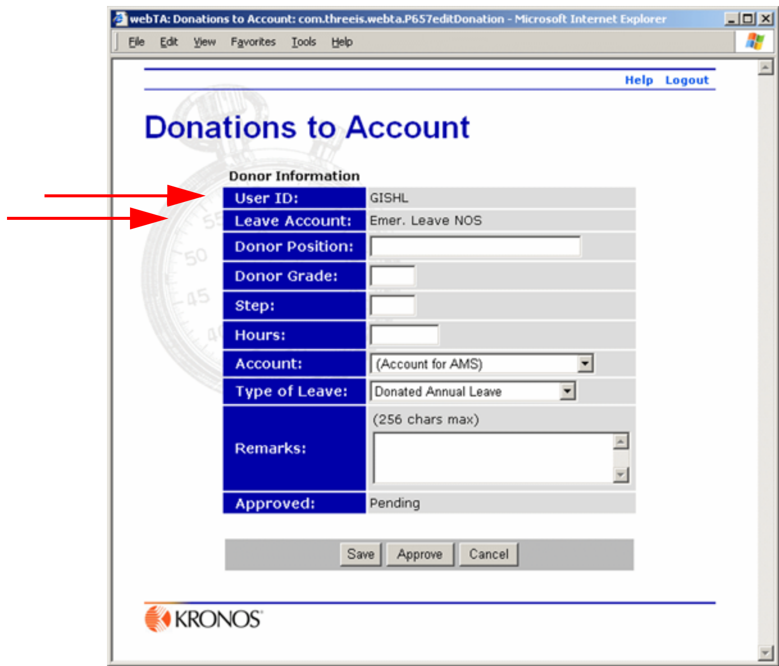
5. If your donor is an internal donor (a donor who has an account in your webTA system), type in, or search for and select, the user ID of the donor.

   - OR -

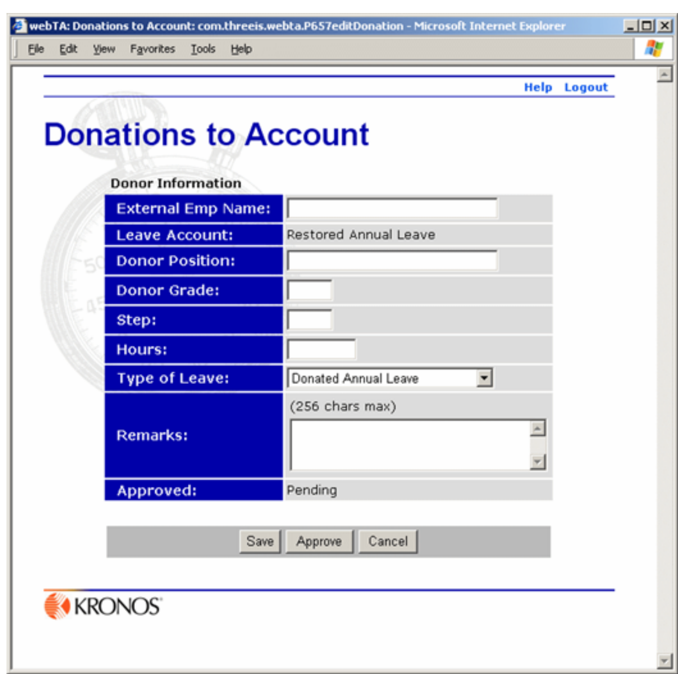
If your donor is an external donor (a donor who does not have a webTA account in your system), leave the **User ID** box empty.

6. Click **Continue**.

If you selected an internal donor in Step 5, the Select Employee page opens containing the donor's user ID and the leave account.



If your donor is an external donor, the Donations to Account page opens with the donor's name field blank.



7. Type in or select the donation information in the appropriate boxes.

   NOTE: **Hours** is the number of hours the donor wants to donate to the account. **Account** is the account the donor wants the hours donated to.

8. If you want to approve the donation immediately, click **Approve**.

   - OR -

   If you want to save the donation in *pending* status, click **Save**.

NOTE: Until the donation is approved, the donated hours cannot be used by a leave recipient.

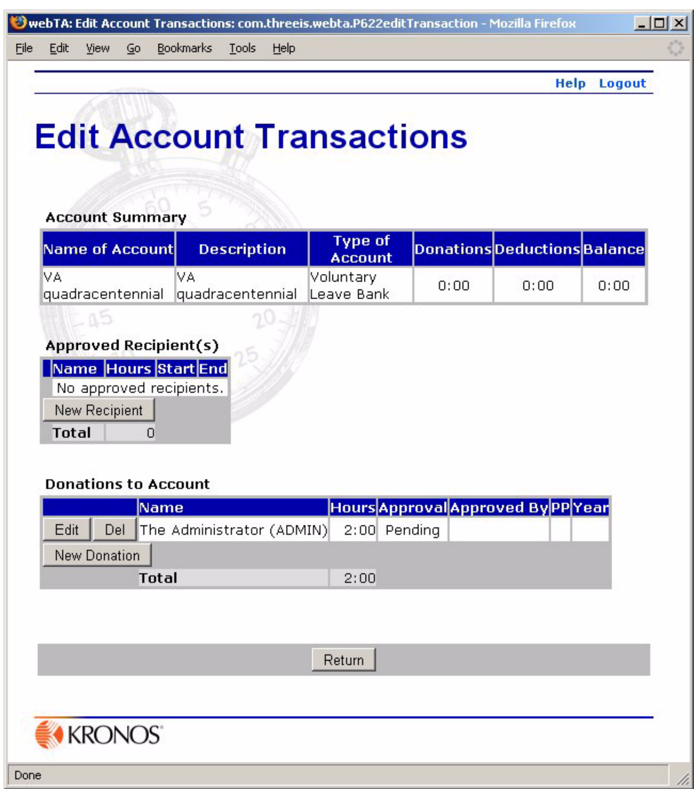
Approving donations

When an employee makes a donation to a Leave Transfer Program account, it is added to the account in *pending* status. It must be approved before use.

To approve a donation entered by a webTA user:

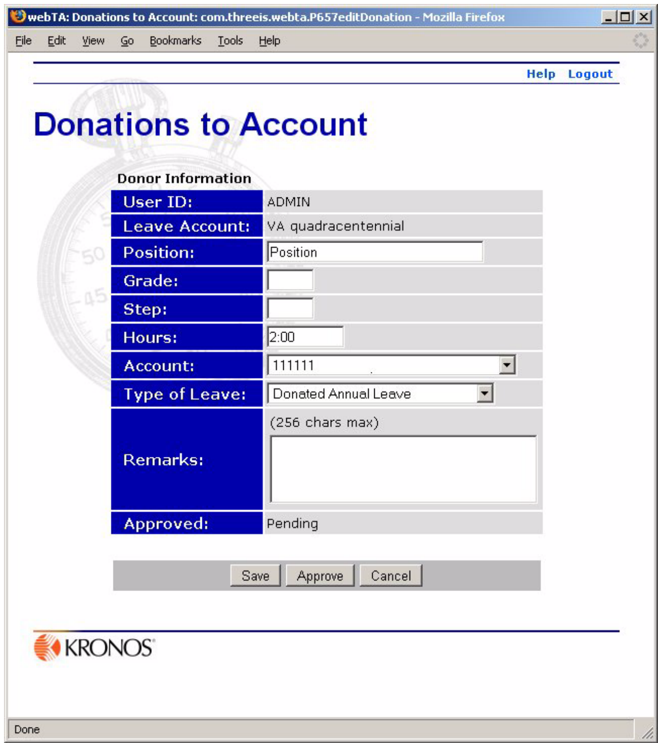
1. If you have not already done so, open the Select Account page by clicking **LTP** on the HR Administrator Main Menu page.
2. Select the appropriate account from the Select Account page, then click **Transactions**.

   The Edit Account Transactions page opens for the account you selected.



3. In the **Donations to Account** section of the page, click **Edit** next to the account you want to approve.

   The Donations to Account page opens.



4. If you want to approve the donation, click **Approve**.

   \- OR -

   If you want to save the donation information without approving it, click **Save**.

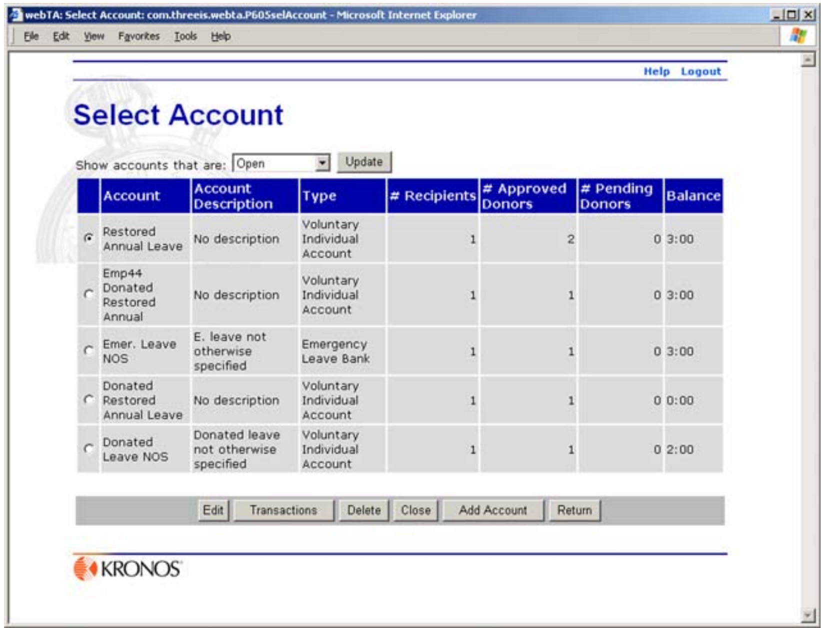
Closing accounts

An account cannot be closed if there are pending transactions against it. Pending transactions are those that have been recorded in a T&A, but have not yet been built and transmitted to the payroll processing center.

To close an account:

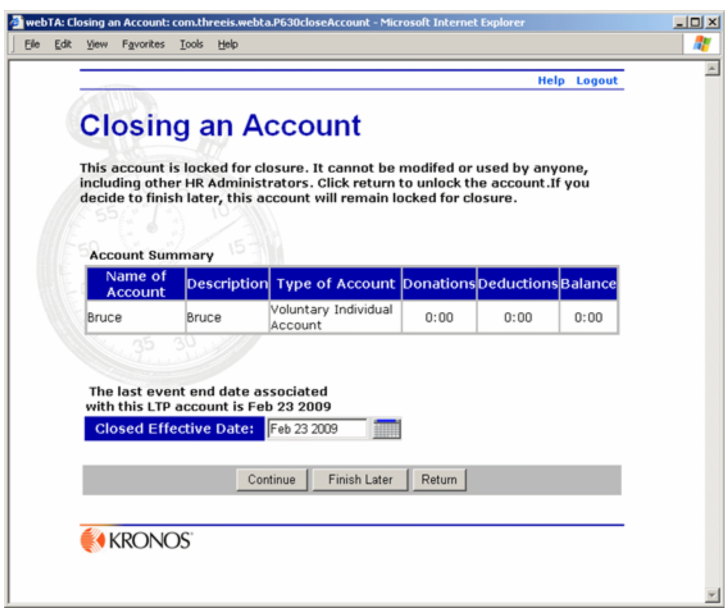
1. Click **LTP** on the HR Administrator Main Menu page.

   The Select Account page opens.



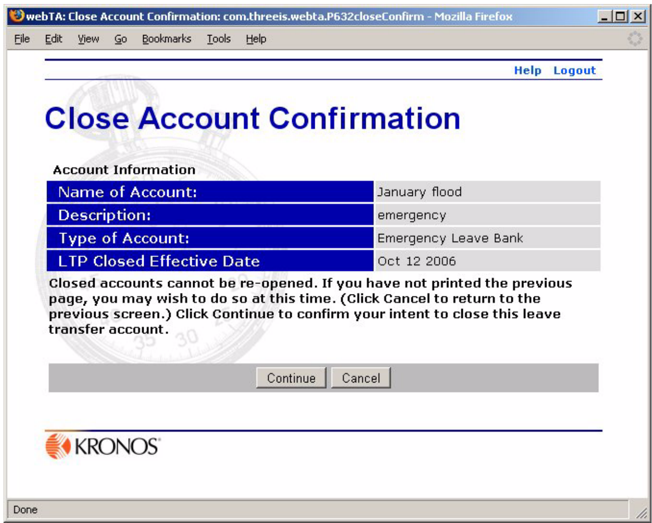
2. Click to select the account that you want to close, then click **Close**.

   If there are pending transactions against the account, an error message tells you that the account cannot be closed. Otherwise, the Closing an Account page opens, providing information about the account you're closing, and giving you information about the closing process.



3. If you want to lock the account for closure, click **Continue**.

   The Close Account Confirmation page opens, providing further information about closing the account.



4. If you want to close the account, click **Continue**.

   The Select Account page reopens, and the account you closed no longer appears in the account list.

webTA calculates the amount of leave to be restored to donors based on the law. In unusual circumstances, however, it may be necessary to make adjustments. The donor has several options for what to do with unused donated leave.

Restoring unused leave to donors

There are two techniques for restoring unused leave: by restoring to individual donors, or by restoring to all donors who have donated to a particular leave account.

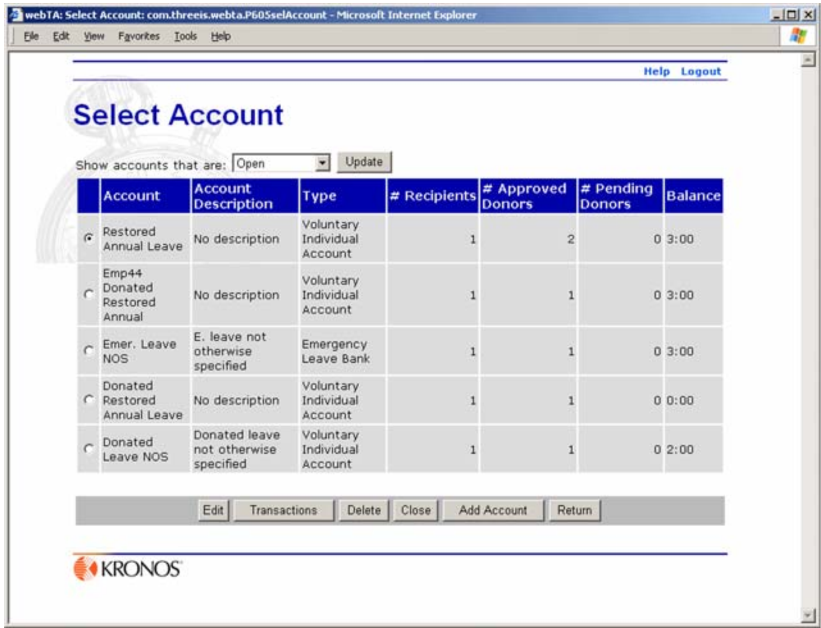
You can modify the amount of leave to be restored on the Edit Restored Donated Leave page. You can also specify when the leave is to be restored to the donor.

If the donor wants some or all of the unused donation to be transferred to another account, you can specify the account and the amount to be transferred.

To restore unused leave to all donors:

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

   The Select Account page opens.



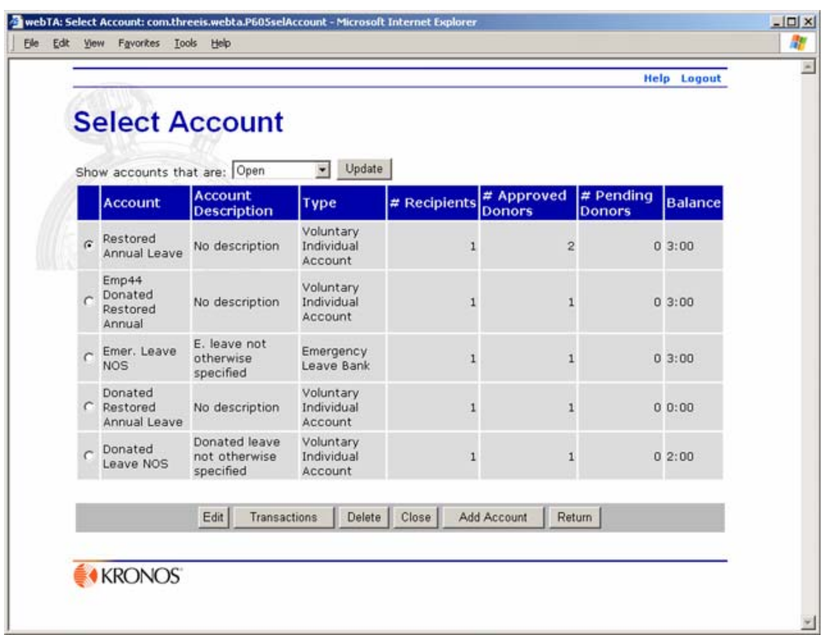
2. Select the account you want to restore from, then click **Close**.

   webTA closes the account and restores unused leave time to the donors.

To restore leave to donors to an individual's leave account:

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

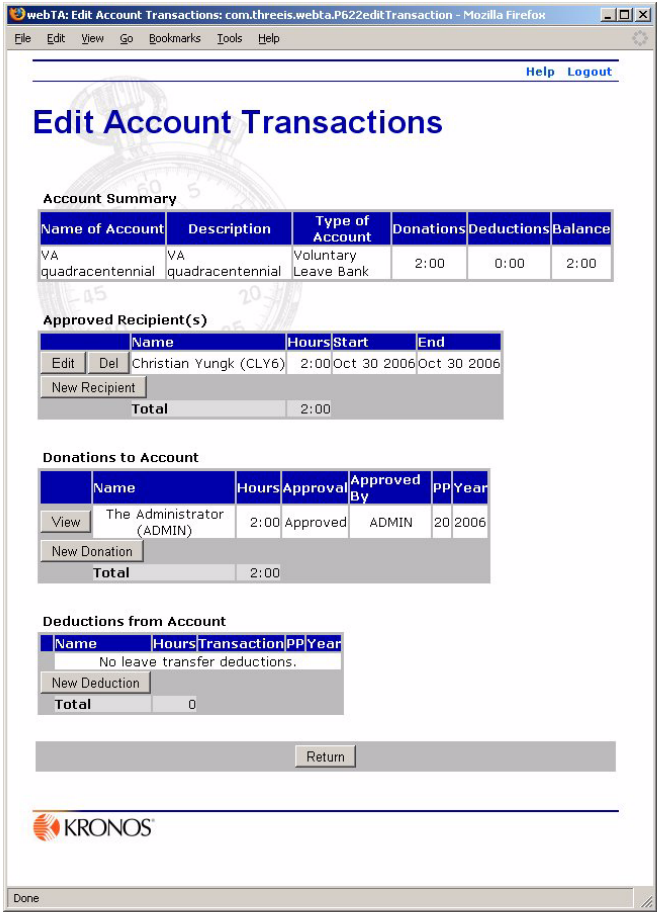
   The Select Account page opens.



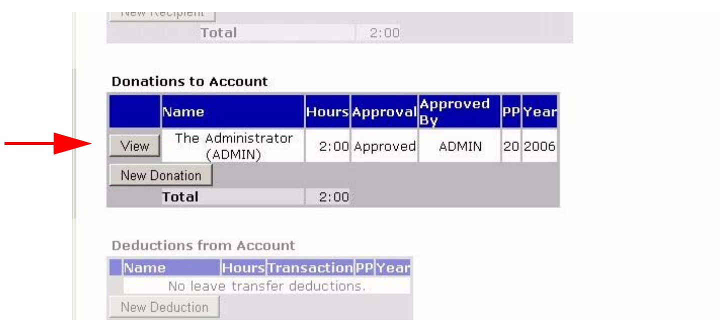
2. Select the account you want to restore from.

3. Click **Transactions**.

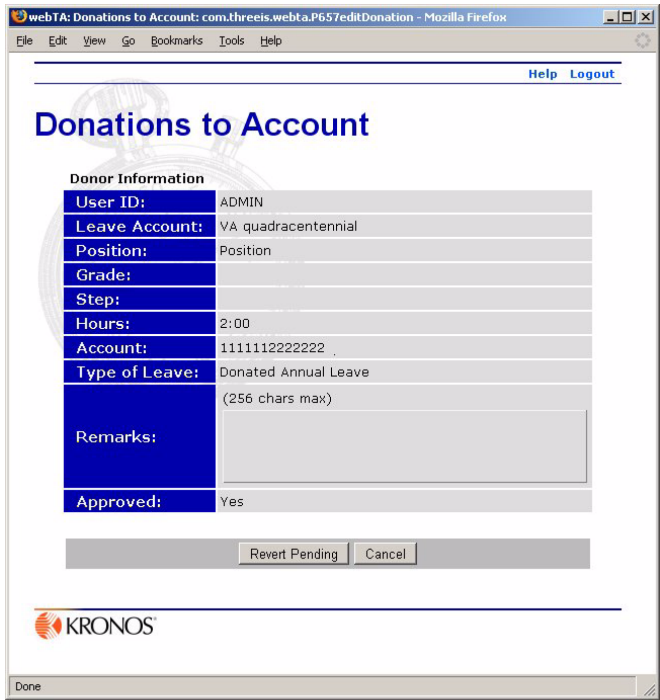
   The Edit Account Transactions page opens.



4. In the Donations to Account section, click **View** next to the appropriate account.



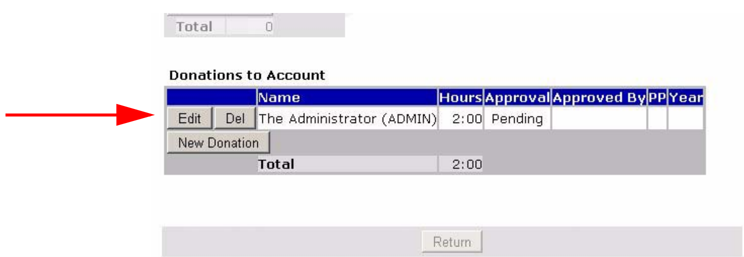
   The Donations to Account page for that account opens.



5. Click **Revert Pending**.

   webTA returns you to the Edit Account Transactions page.

   The buttons next to the account you chose are now **Edit** and **Del** instead of **View**, and the **Approved** column shows the account as *Pending*.



6. Click **Del** next to the appropriate account.

   webTA deletes the donated leave from the account and restores it to the donor.

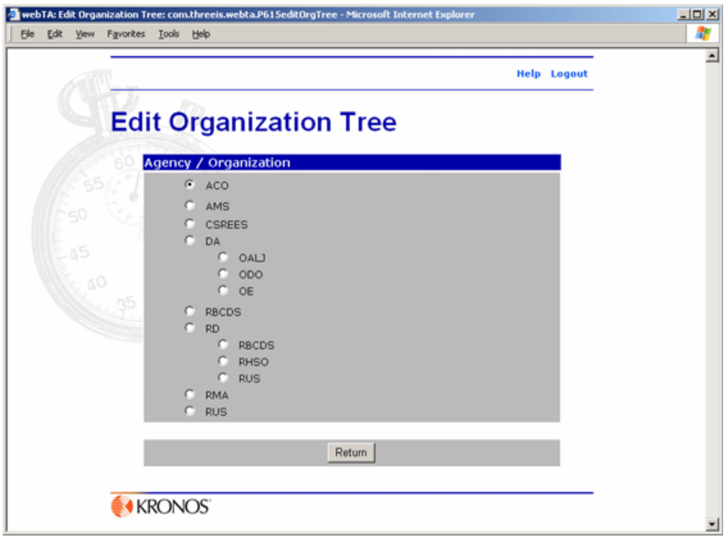
   NOTE: Leave cannot be restored to donors if the resulting LTP balance would be less than zero.

Viewing the organization tree

In webTA, organization trees are used to group employees related by a common HR Administrator.

To view your organization tree:

1. On the HR Administrator Main Menu page, click **Org Tree**.
2. The Edit Organization Tree page opens.



Managing accounts

Accounts management functions in webTA let HR Administrators edit existing accounts and create new accounts that will be used by Timekeepers and Employees.

Adding an account

The Account Creation Wizard helps HR Administrators create new accounts, incrementally adding account field values and checking them against any cross-field validations that are in place.

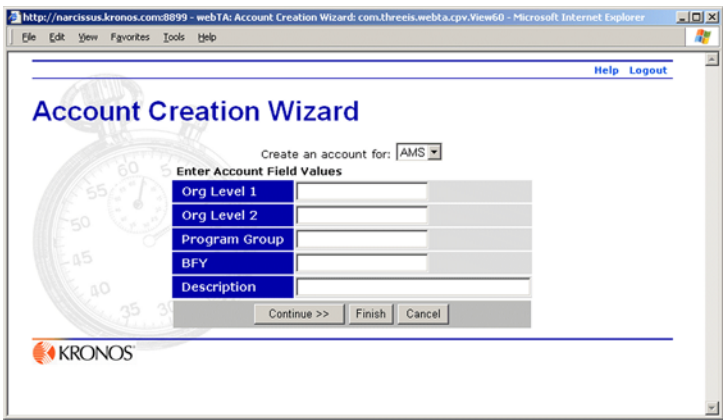
To add an account:

1. On the HR Administrator main menu, click **Accounts**.

   The Account Management page opens.

2. Click **Add**.

   The Account Creation Wizard page opens.



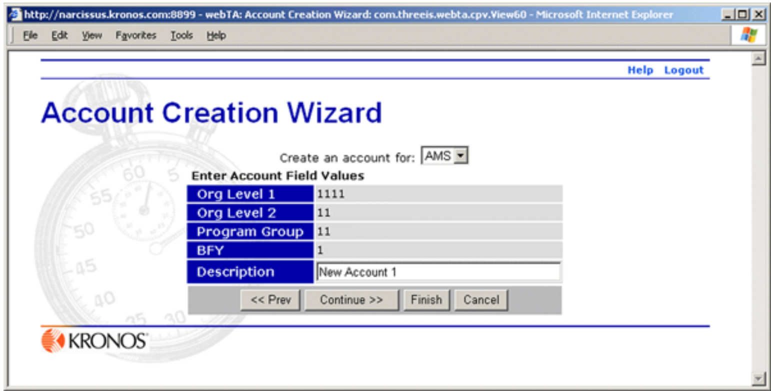
   NOTE: The page you see may differ from this example, depending on your agency.

3. Select from the **Create an account for** list and type in the values for the account fields.

   IMPORTANT! Once you finish entering the information for a new account, you can save the account by clicking **Finish** on this page. However, Kronos recommends that you verify the account information by completing the remaining steps. Doing so will also let you discard the account before it is added.

4. Click **Continue**.

   The Account Creation Wizard page displays your entries.



5. Verify the account settings and, if necessary, modify the account description or change the **Create an account for** value.
6. If you want to save the new account, click **Finish**.

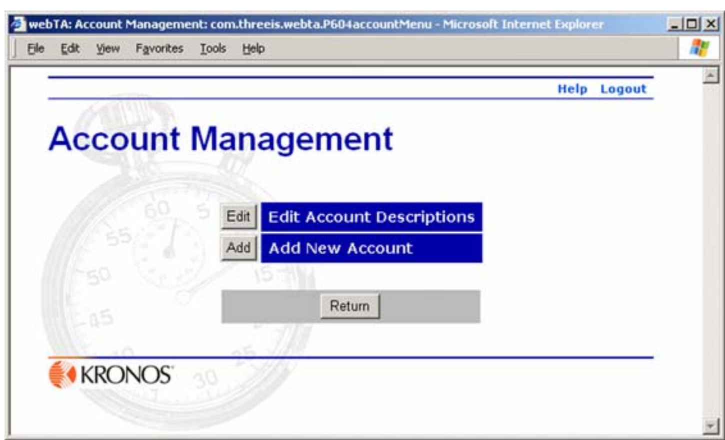
   - OR -

   If you want to discard the new account and start again, click **Previous** and return to Step 3.

To edit an account description:

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

   The Account Management page opens.



2. Click **Edit**.

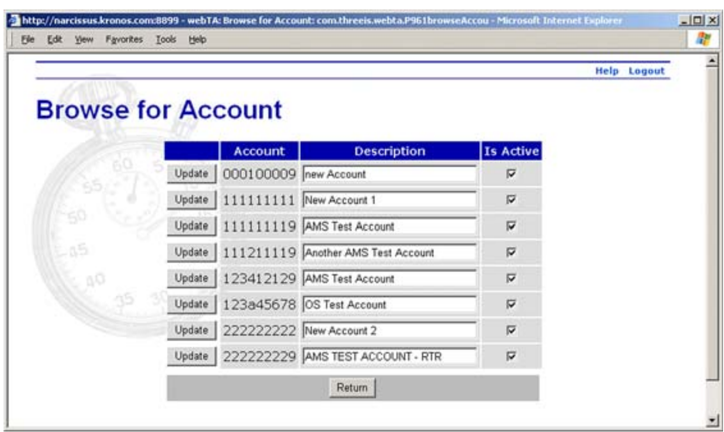
   The Search for Account page opens.

NOTE: The page you see may differ from this example, depending on your agency.

3. Type in any values you want to search by, then click **Find Account**.

   NOTE: You can click **Find Account** without limiting the search. However, if you do this, webTA will return a list of all of your agency's accounts.

   The Browse for Account page opens listing the accounts that meet your search criteria



4. Modify the account descriptions, clicking **Update** for each change.
5. When you finished making changes to the account descriptions, click **Return**.

About Leave Transfer Program Management

As part of the Leave and Premium Pay Request Module, webTA provides full support to manage your agency's leave transfer programs.

Three types of leave transfer programs are supported:

- *Emergency Leave* transfer banks are established for specific emergencies.

  Anyone approved to receive leave from the bank may use the leave donated to it. Similar to a Voluntary Leave Transfer Bank, the leave used from the Emergency Leave Transfer Bank affects recipients differently, and puts different limits on the donations that a person can make to the program.

- *Voluntary Leave* transfer banks let employees donate leave to a pool for use by anyone approved as a recipient from the bank.
- *Voluntary Individual Leave* transfer accounts apply to specific employees.

  Leave donated to this type of account may only be used by one employee. The primary difference between this type of account and a Voluntary Leave Transfer Bank is that there can only be one approved recipient for each account.

webTA tracks these types of transactions associated with the each account:

- Approved recipients

  For an approved recipient to use donated leave, an “event” must be established for that person. An event has a starting and ending date and a limit on the amount of donated leave the recipient may use.

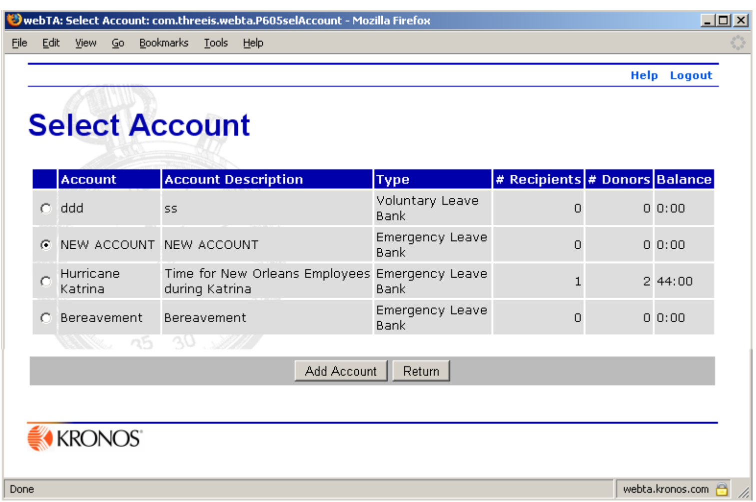
- Donations to the account

  Donations can be made from within webTA by individuals (with the approval of the HR Administrator), or the HR Administrator can add donations for volunteer donors. Donations received from outside the agency must be entered by the HR Administrator.

- Deductions from the account

  As donated leave is used, webTA generates deduction transactions and adds them to the time card as a leave transaction. Additionally, deductions can be entered to liquidate advanced annual or sick leave balances or leave without pay.

Leave Transfer Program functions are accessed from the Select Account page that opens by clicking **LTP** on the HR Adniminstrator Main Menu page.



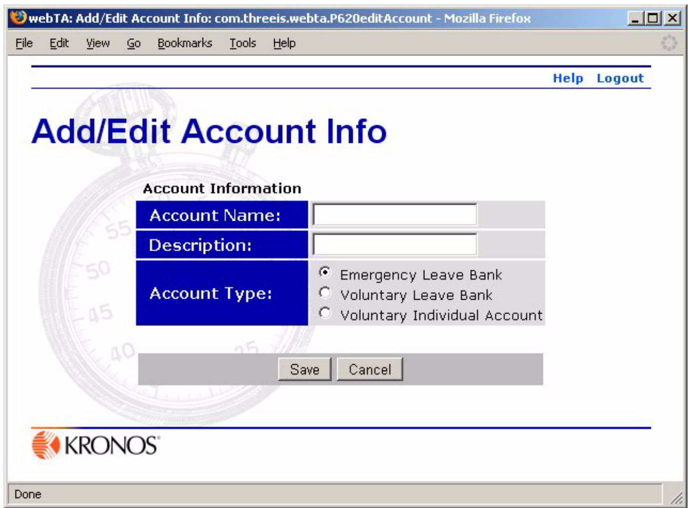
The **Type** column on this page shows the leave types associated with each account.

Adding an account

To add an account:

1. Open the Select Account page by clicking **LTP** on the HR Administrator Main Menu page.
2. Click **Add Account**.

   The Add/Edit Account Info page opens.



3. Type the name of the account and a description.

   IMPORTANT! If your agency has a naming convention or has established account numbers for Leave Transfer accounts, use them as the account name.
4. Click to select the type of account being created, then click **Save**.
5. If the Edit Recipient page opened because you are adding a Voluntary Individual account, enter the appropriate information in the fields, then click **Save**.

   webTA returns you to the Select Account page and the the new account appears in the accounts list.

Once an account has been created, employees can donate leave to it, and recipients who may use the donated leave can be established.

Modifying leave transactions

Using webTA leave transactions, you can:

- Add recipients of donated leave
- Edit recipients of donated leave
- Remove recipients of donated leave

- Edit donated leave transactions
- Approve leave donated by other employees
- Add leave donations
- Liquidate advanced leave or LWOP

Adding a recipient

For an approved recipient to use donated leave, an “event” must be created.

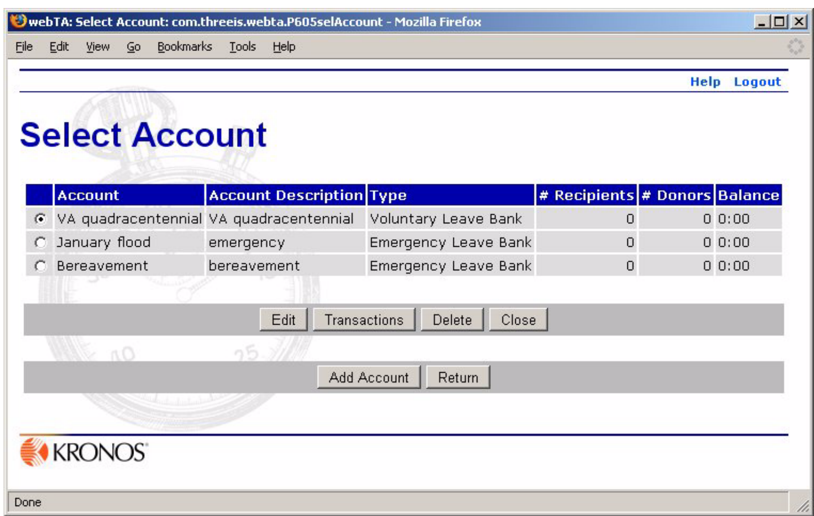
- If the recipient is using the leave from a Leave Bank, create the event in an existing Leave Bank account.
- If an Individual Leave Transfer account is required, create the account and add the recipient to it.

For information about adding accounts, see “Adding accounts” on page 14.

To add a recipient:

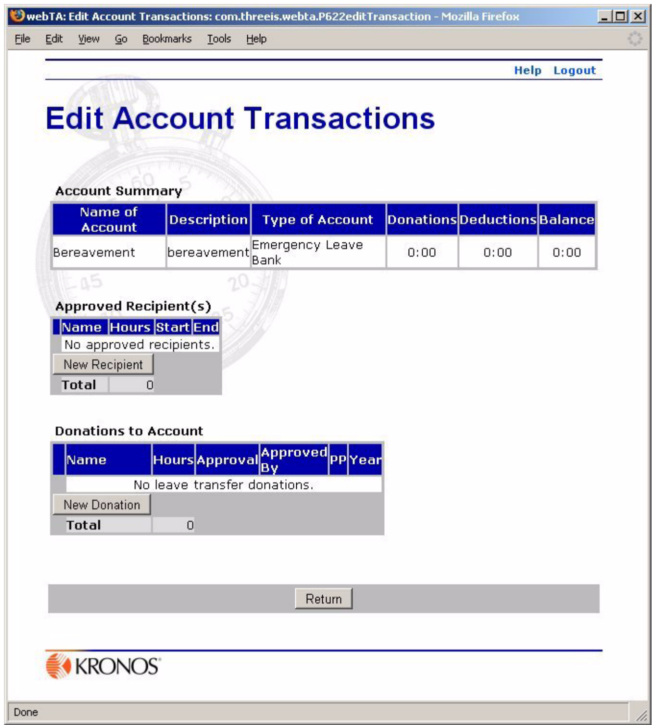
1. Select LTP on the HR Administrator Main Menu page.

   The Select Account page opens.



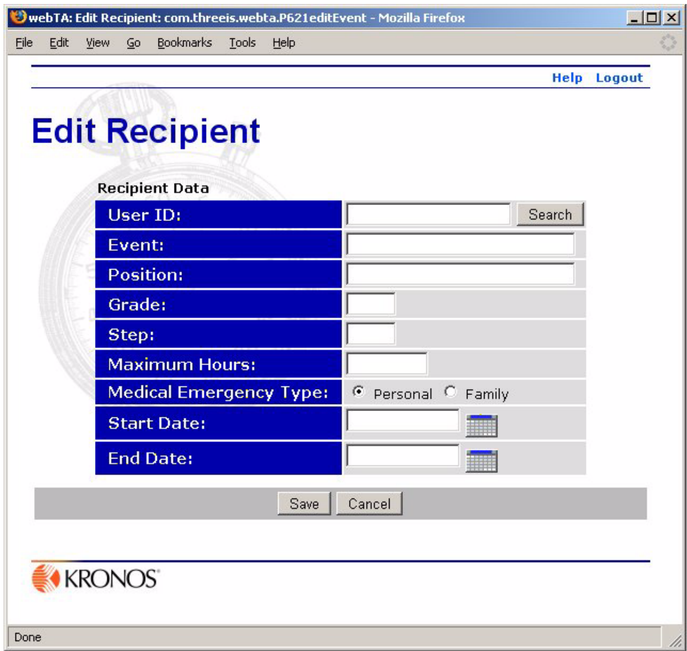
2. On the Select Account page, click to select the account that you want to edit.
3. Click **Transactions**.

   The Edit Account Transactions page opens for the account you selected.



4. Click **New Recipient** in the Approved Recipients section.

The Edit Recipient page opens.



5. Type in the recipient's user ID, or search for it using webTA's search function.

   If you chose to search for the recipient, once you find and select the recipient, webTA automatically enters the recipient's user ID into the **User ID** box

6. Type in the leave recipient information required for reporting, the maximum number of donated hours a recipient may use, and the start and end dates of the event.

   Maximum Hours is the most donated leave that the person is eligible to use, not the amount of leave that has been donated for that event. Until donations have been made to the account and approved by an HR Administrator, the recipient cannot use any hours. The account balance can never be less than zero.

7. When you are finished entering the leave information, click **Save**.

   The Edit Account Transactions window reopens, showing the added recipient.

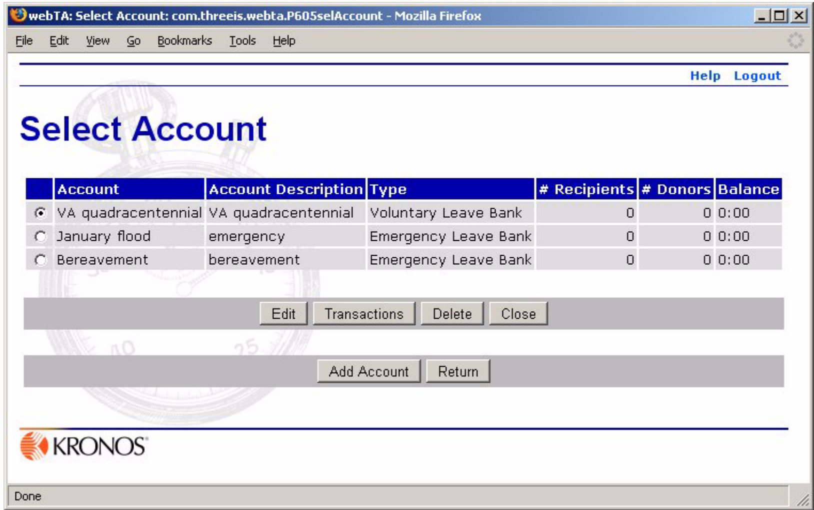
Liquidating advanced leave or LWOP

If there are sufficient donated hours in the account, advanced annual leave, advanced sick leave, or leave without pay may be liquidated for an approved recipient.

The HR Administrator must enter a manual deduction into the account. Deductions cannot be entered that would result in an account balance less than zero. In fact, until there are donations recorded and approved, the Deductions from Account section of the Transactions page will not be visible.

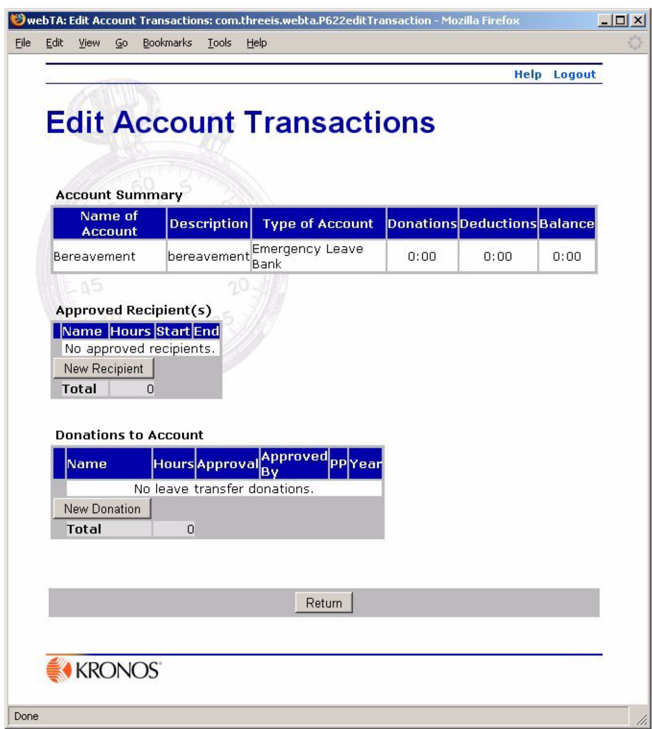
To liquidate leave:

1. On the HR Administrator Main Menu page, click **LTP**.
2. The Select Account page opens.

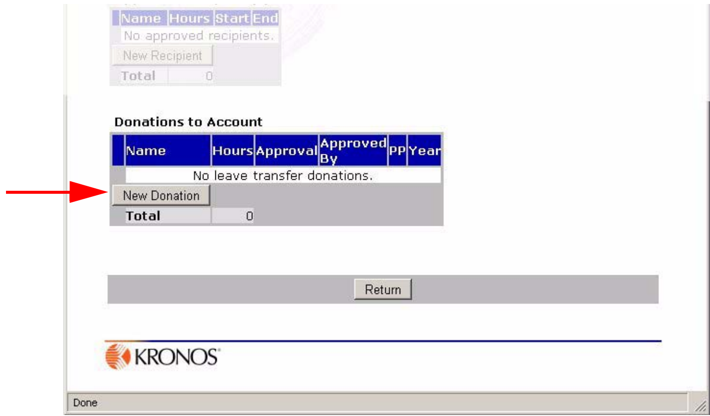


3. Click to select the appropriate account, then click **Transactions**.

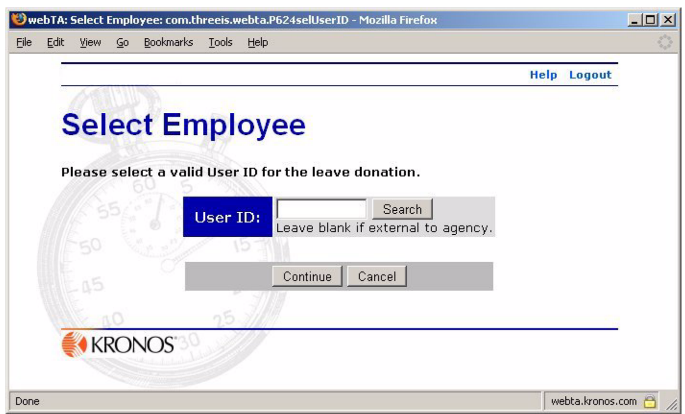
   The Edit Account Transactions page for the selected account opens.



In the Deductions from Account section, click **New Donation**.

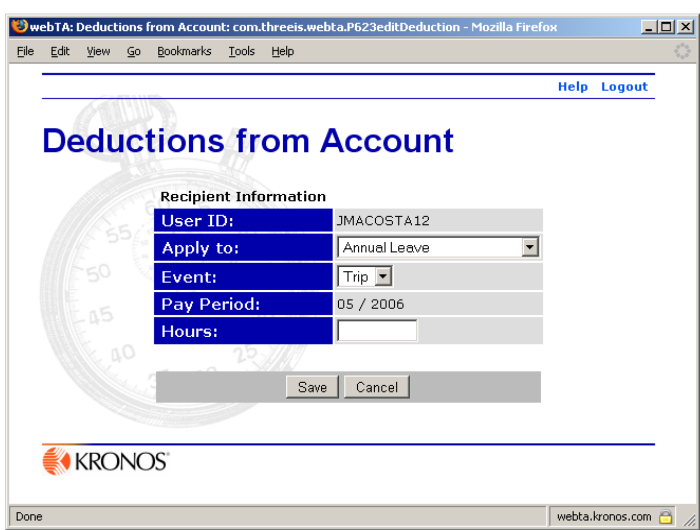


The Select Employee page opens.



4. Type in, or search for and select, the recipient’s user ID, then click **Continue**.

   The Deductions from Account page opens for the employee you selected.



5. Select the type of leave being liquidated, the event to which to apply the donated leave, and the number of hours.
6. Click **Save.**

   webTA checks to make sure that the number of hours does not exceed the available balance or the maximum number of hours approved for the recipient's event, and returns to the Edit Account Transactions page.

About donations to Leave Transfer accounts

Employee donations to leave transfer accounts can either be entered by the donating employee through the Leave/Premium Pay section on the Employee Main menu or it can be entered by an HR Administrator from the Edit Account Transactions page. Either way, the donation must be approved by an HR Administrator before it can be used by an approved recipient.

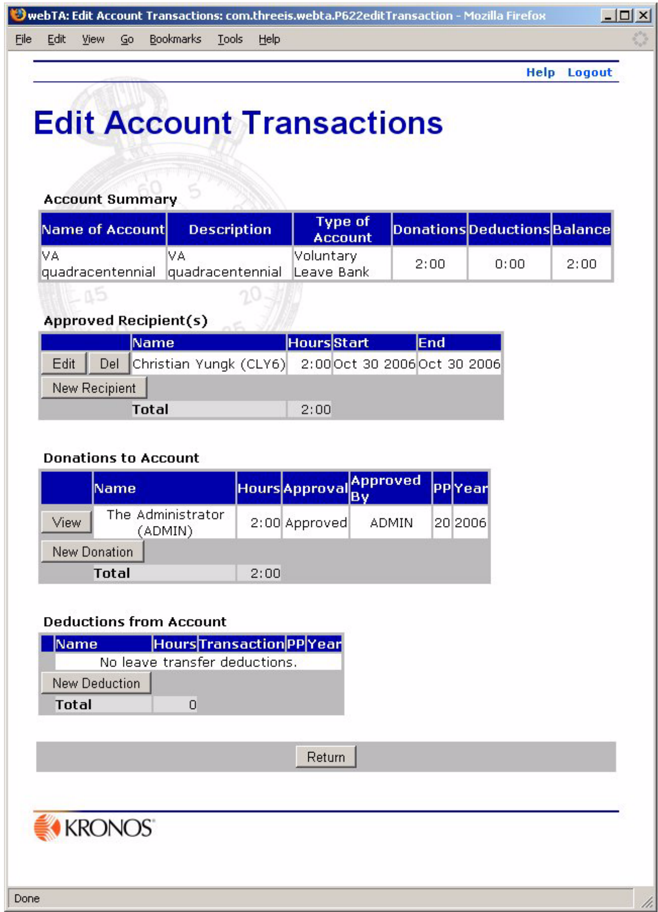
A recipient cannot use donated leave after the end of the event. The end date of the event may be extended and its maximum hours increased by editing the event record.

The HR Administrator may add donations on behalf of employees, both from within the agency or from external sources.

To add a donation:

1. Open the Select Account page by clicking **LTP** on the HR Administrator Main Menu page.
2. Select an account on the Select Account page.
3. Click **Transactions**.

   The Edit Account Transactions page opens.



4. In the **Donations to Account** section, click the **New Donation** button for the account you want to add a donation to.

   The Select Employee page opens.

5. If your donor is an internal donor (a donor who has an account in your webTA system), type in the user ID of the donor.

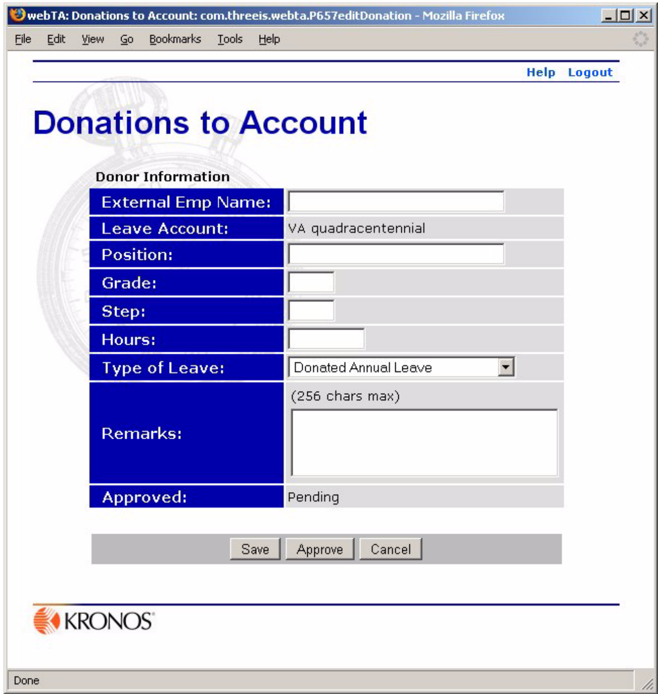
   - OR -

   If your donor is an external donor (a donor who does not have a webTA account in your system), leave the **User ID** box blank.

   You may also search for the donor using webTA's search function.

6. Click **Continue**.

   The Donations to Account page opens.



7. Fill in and select the donation information in the appropriate boxes.

   NOTE: **Hours** is the number of hours the donor wants to donate to the account. **Account** is the account the donor wants the hours donated to.

8. If you want to approve the donation immediately, click **Approve**.

   - OR -

   If you want to save the donation in *pending* status, click **Save**.

NOTE: Until the donation is approved, donated hours cannot be used by a leave recipient.

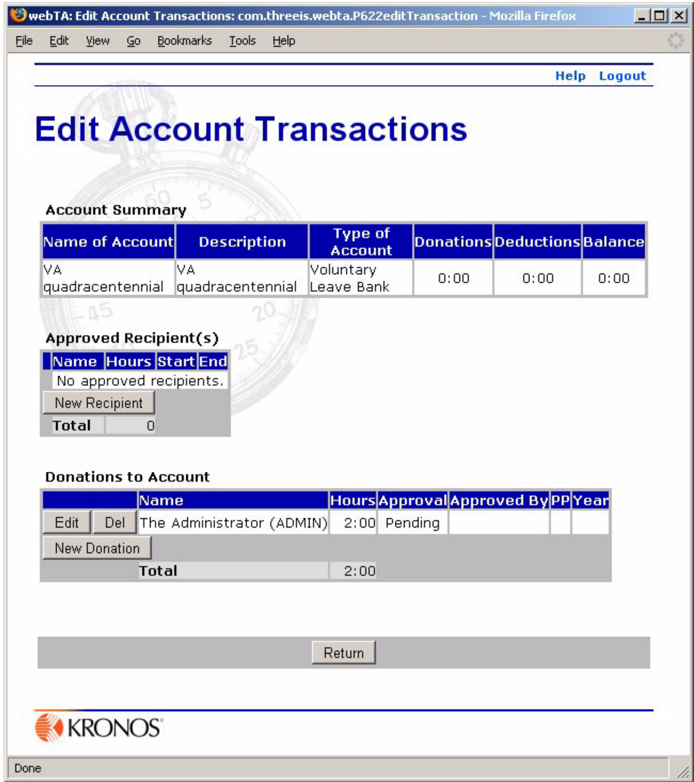
Approving donations

When an employee makes a donation to a Leave Transfer Program account, it is added to the account in *pending* status. It must be approved before use.

To approve a donation entered by a webTA user:

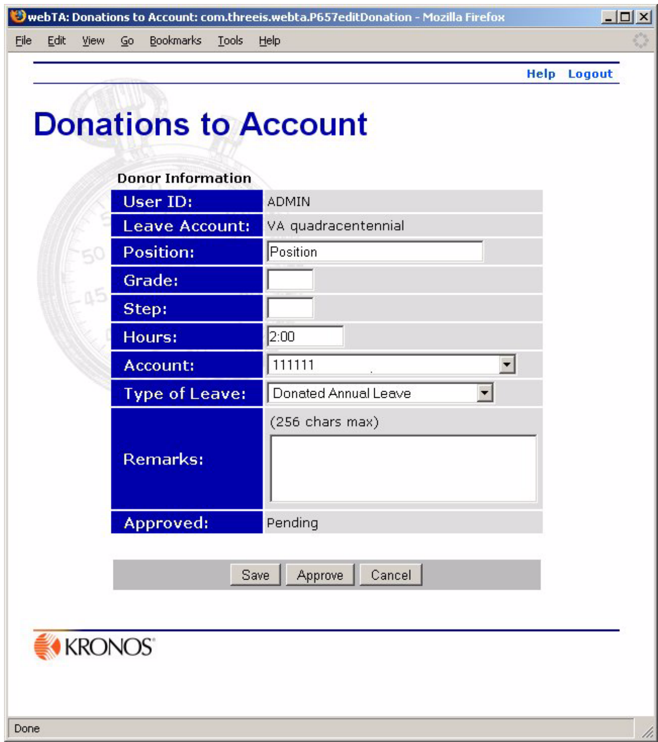
1. If you have not already done so, open the Select Account page by clicking **LTP** on the HR Administrator Main Menu page.
2. Select the appropriate account from the Select Account page, then click **Transactions**.

   The Edit Account Transactions page opens for the account you selected.



3. In the **Donations to Account** section of the page, click **Edit** next to the account you want to approve.

   The Donations to Account page opens.



4. If you want to approve the donation, click **Approve**.

   \- OR -

   If you want to save the donation information without approving it, click **Save**.

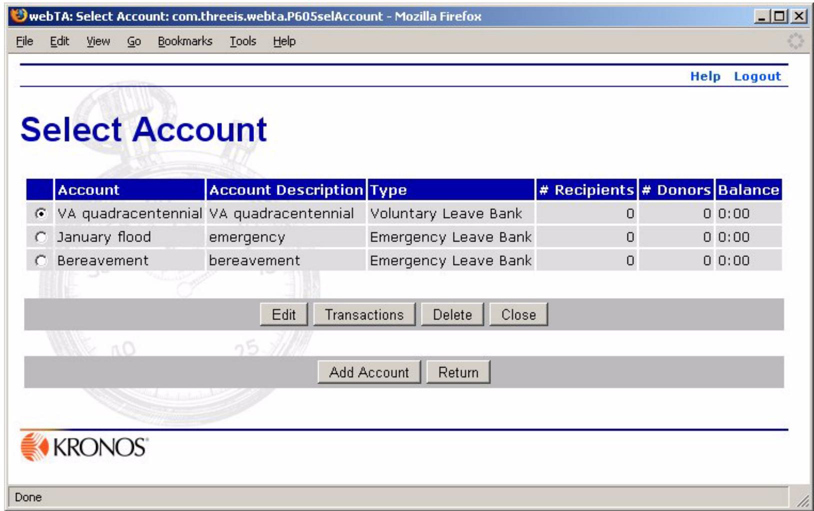
Closing accounts

An account cannot be closed if there are pending transactions against it. Pending transactions are those that have been recorded in a time card, but have not yet been built and transmitted to the payroll processing center.

To close an account:

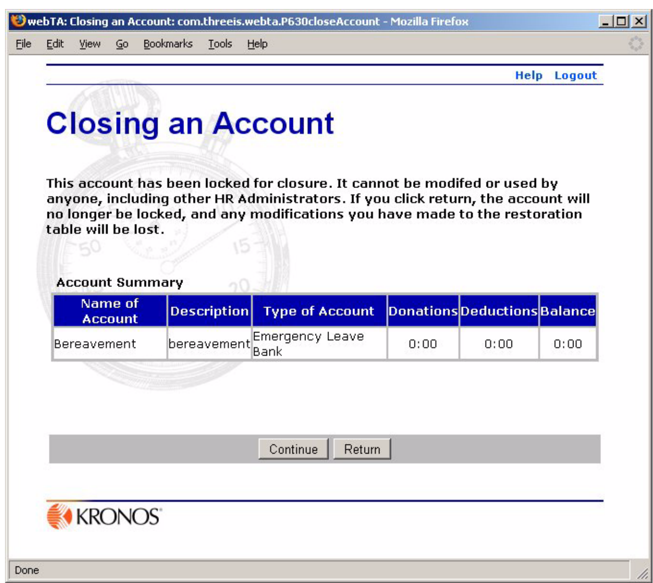
1. Click **LTP** on the HR Administrator Main Menu page.

   The Select Account page opens.



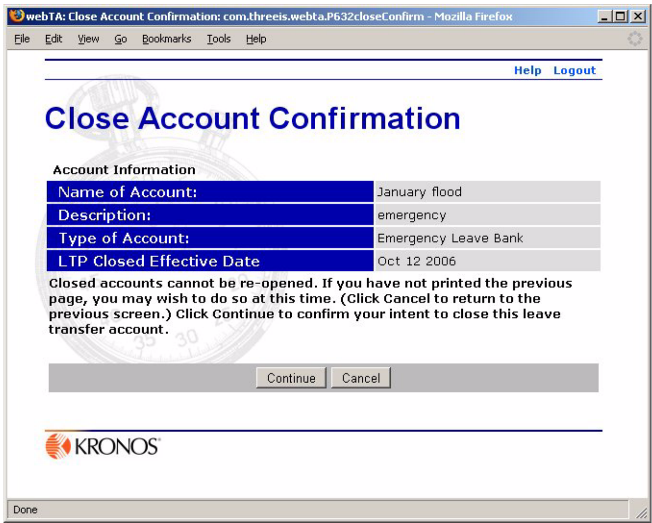
2. Click to select the account that you want to close, then click **Close**.

   If there are pending transactions against the account, an error message tells you that the account cannot be closed. Otherwise, the Closing an Account page opens, providing information about the account you're closing, and giving you information about the closing process.



3. If you want to lock the account for closure, click **Continue**.

   The Close Account Confirmation page opens, providing further information about closing the account.



4. If you want to close the account, click **Continue**.

   The Select Account page reopens, and the account you closed no longer appears in the account list.

NOTE: webTA calculates the amount of leave to be restored to donors based on the law. In unusual circumstances, however, it may be necessary to make adjustments. The donor has several options for what to do with unused donated leave.

Restoring unused leave to donors

There are two techniques for restoring unused leave: by restoring to individual donors, or by restoring to all donors who have donated to a particular leave account.

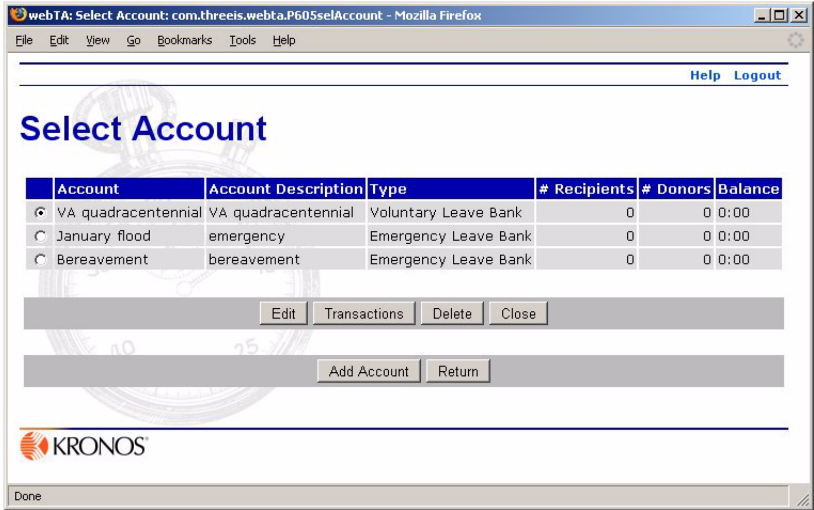
You can modify the amount of leave to be restored on the Edit Restored Donated Leave page. You can also specify when the leave is to be restored to the donor.

If the donor wants some or all of the unused donation to be transferred to another account, you can specify the account and the amount to be transferred.

To restore unused leave to all donors:

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

   The Select Account page opens.



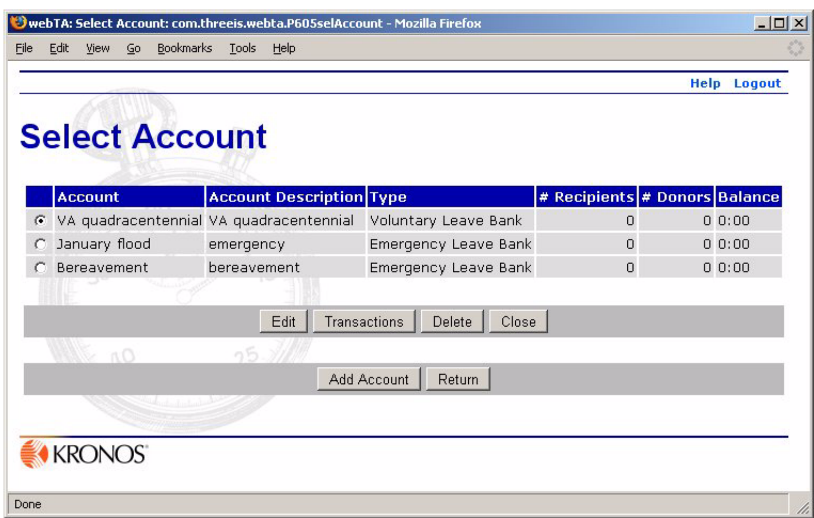
2. Select the account you want to restore from, then click **Close**.

   webTA closes the account and restores unused leave time to the donors.

To restore leave to donors to an individual's leave account:

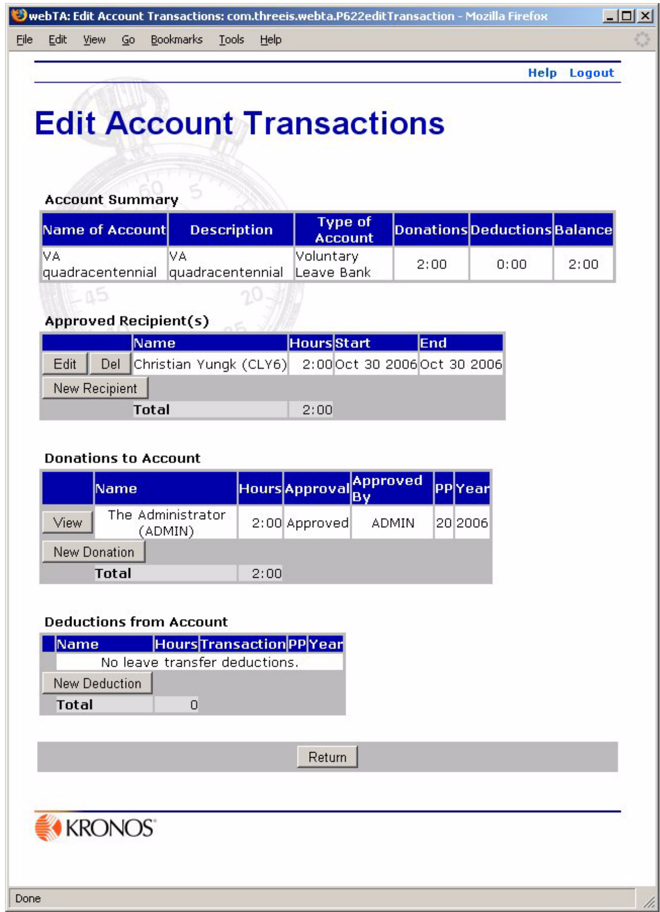
1. On the HR Administrator Main Menu page, click **LTP**.

   The Select Account page opens.

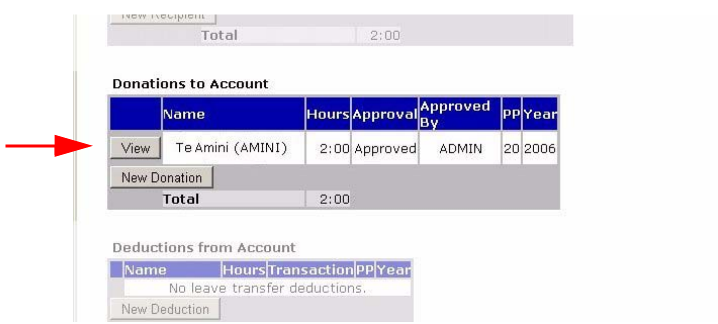


2. Select the account you want to restore from.
3. Click **Transactions**.

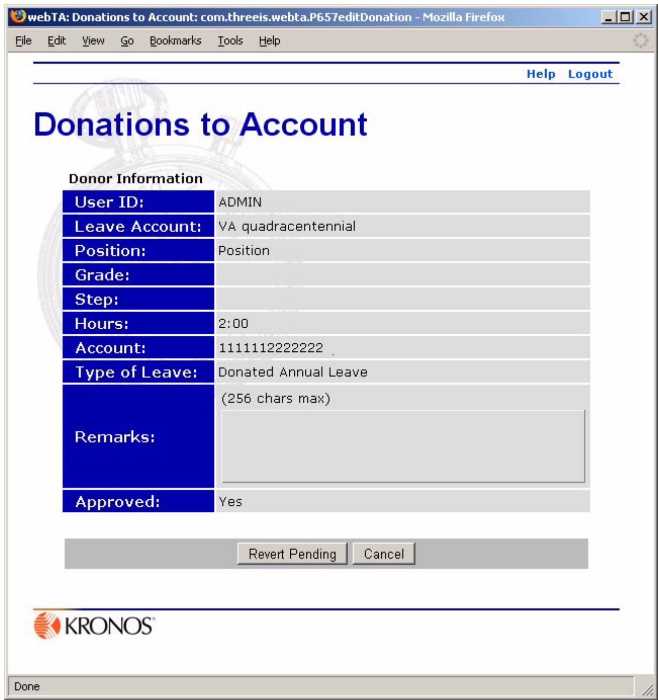
   The Edit Account Transactions page opens.



4. In the Donations to Account section, click **View** next to the appropriate account.



The Donations to Account page for that account opens.



5. Click **Revert Pending**.

   webTA returns you to the Edit Account Transactions page.

   The buttons next to the account you chose are now **Edit** and **Del** instead of **View**, and the **Approved** column shows the account as *Pending*.

6. Click **Del** next to the appropriate account.

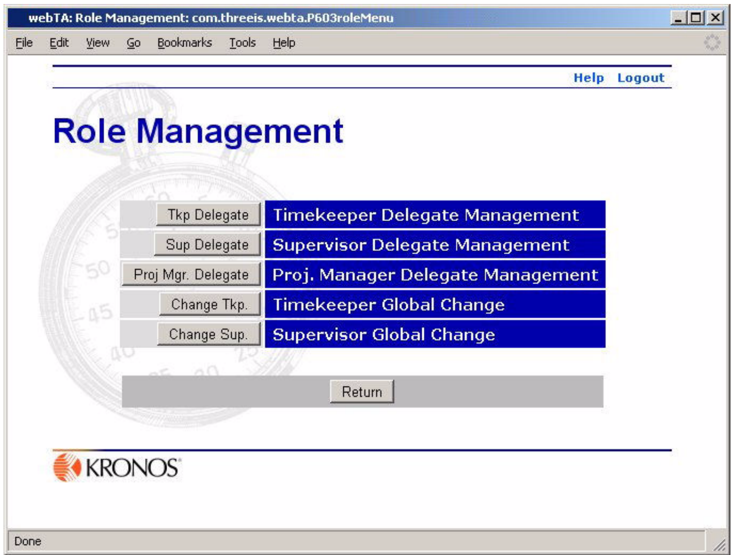
   webTA deletes the donated leave from the account and restores it to the donor.

   NOTE: Leave cannot be restored to donors if the resulting balance would be less than zero.

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.



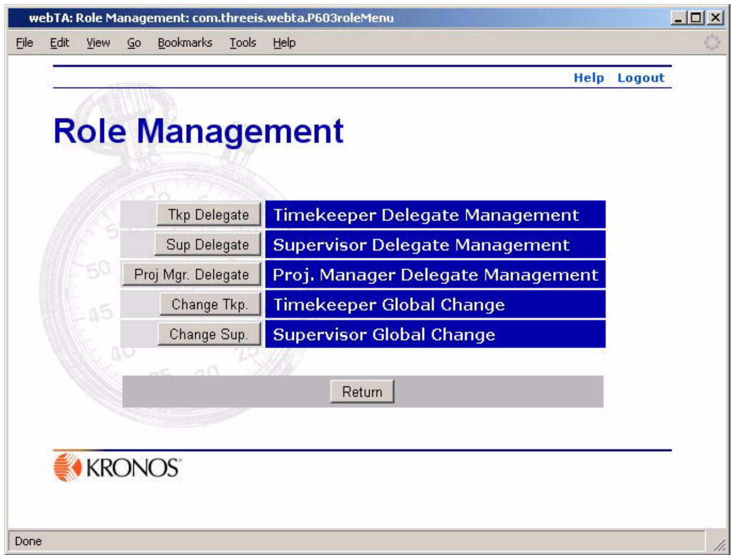
Managing Timekeeper delegates

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.

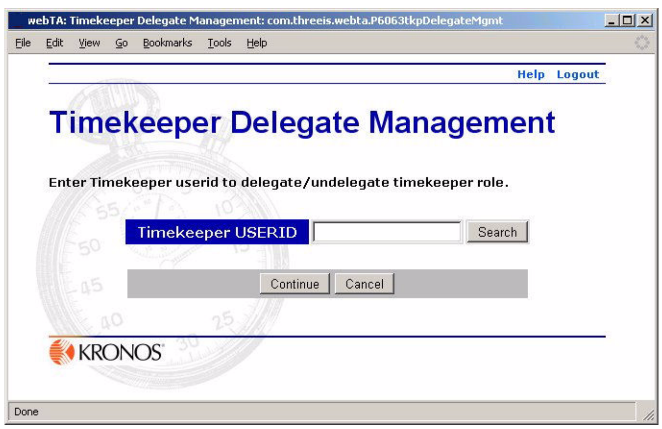
To add a Timekeeper delegate:

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.

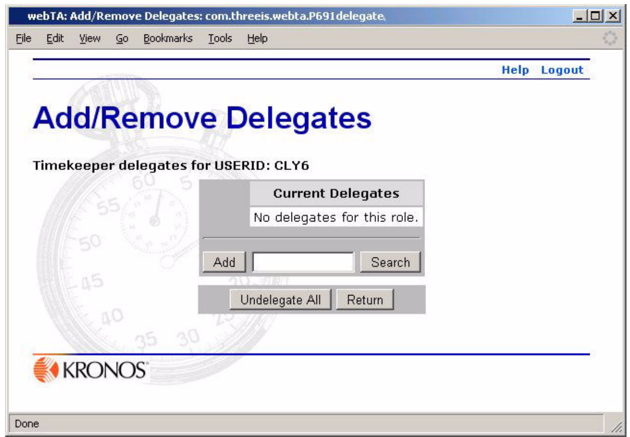


4. In the **Timekeeper USERID** box, type in the user ID for the timekeeper who is to be delegated for.

   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.

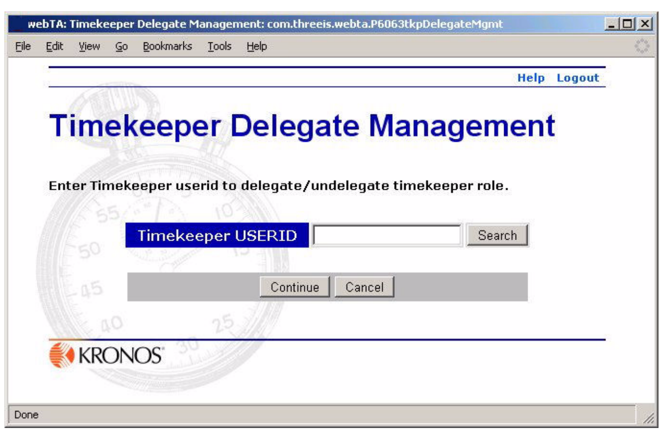
7. Click **Add**.

   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.

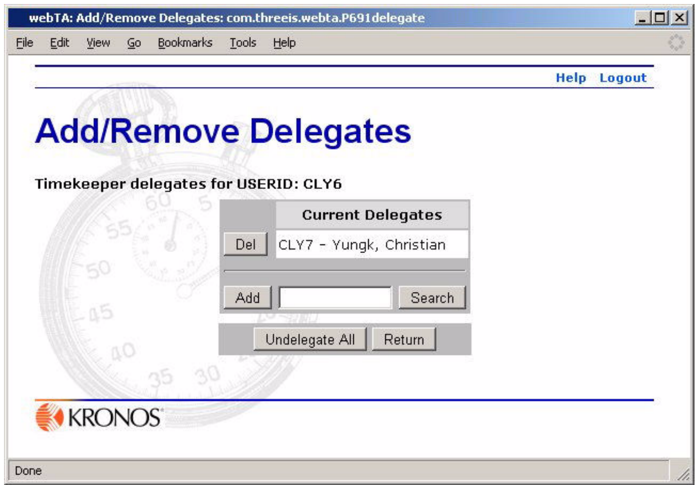


2. In the **Timekeeper USERID** box, type in the user ID for the timekeeper who you want to remove a delegate from.

   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.

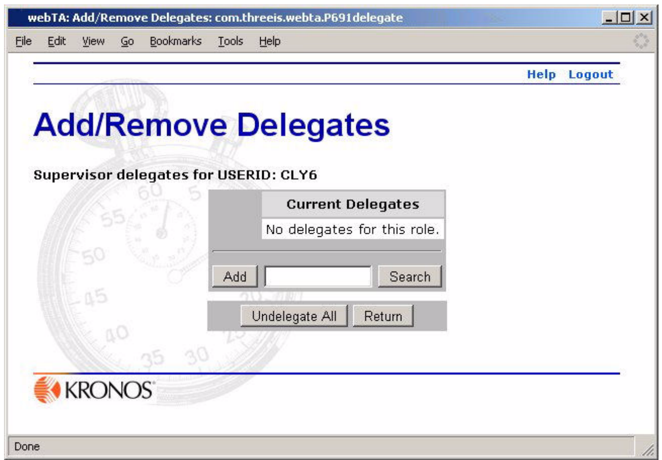
2. Type in the user ID of the supervisor for whom you are creating a delegate for.

   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.

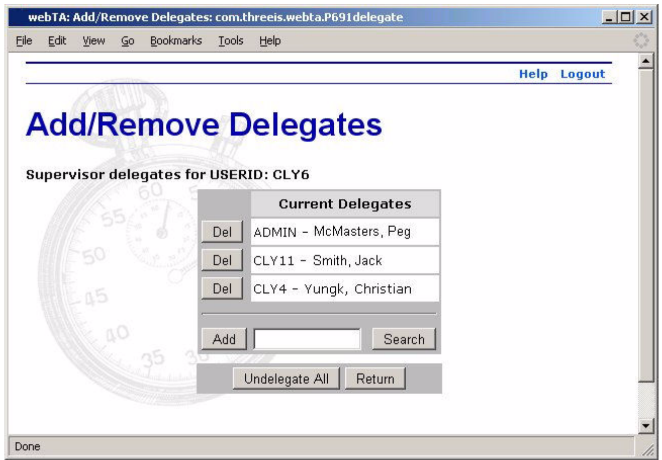
To remove Supervisor delegates:

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.

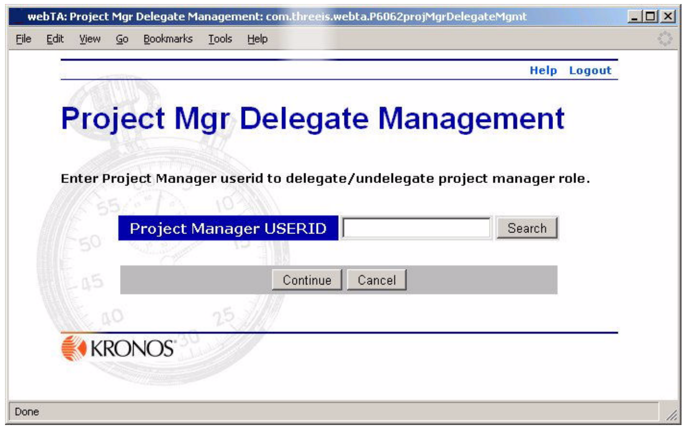
Managing Project Manager delegates

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.



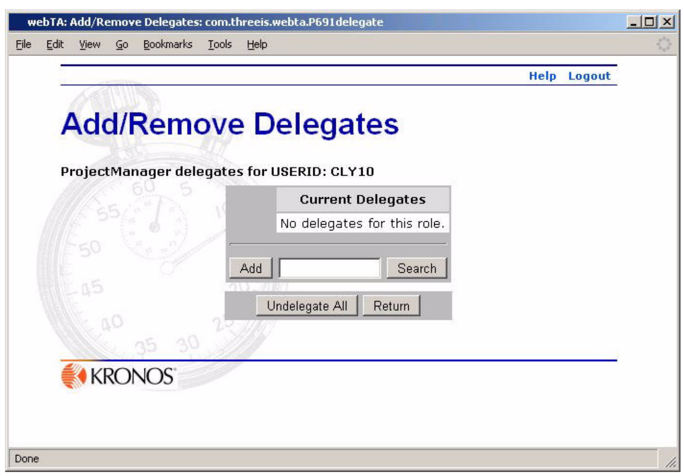
2. Type in the user ID of the project manager for whom you are creating a delegate for.

   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.

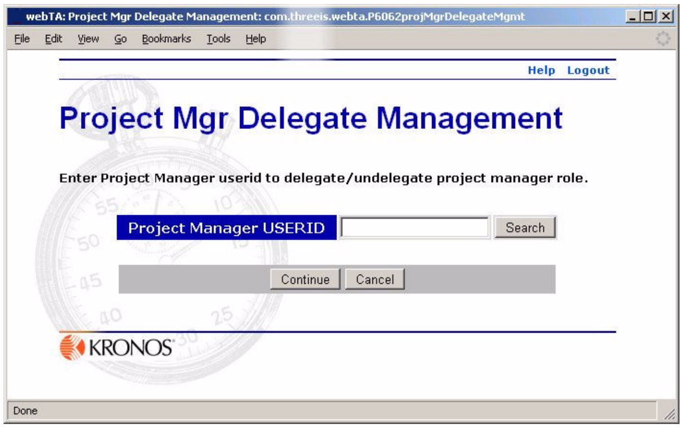
5. Click **Add**.

   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:

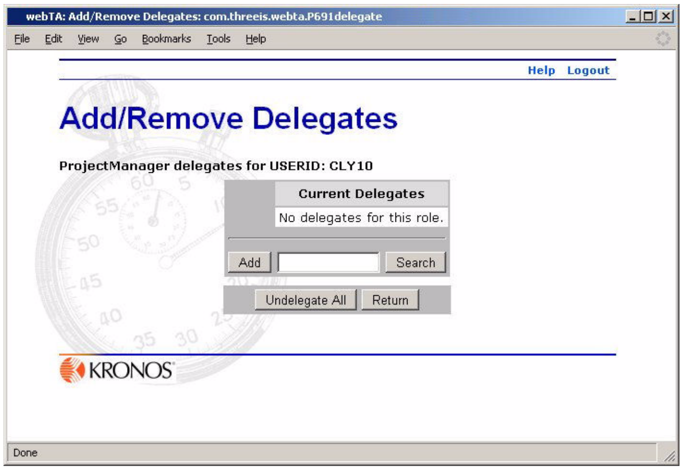
1. Click **Roles** on the HR Administrator Main Menu page, then click **Proj Mgr. Delegate** on the Role Management page.

   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

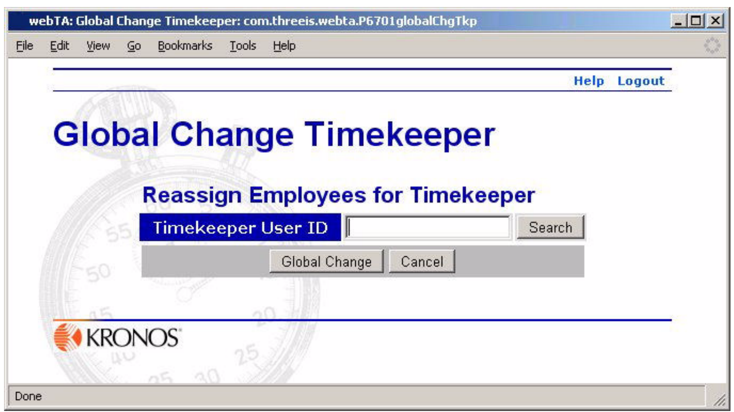
The Timekeeper Global Change function is used to reassign all employees from one timekeeper to another. Instead of moving each employee to the new timekeeper, webTA lets you move them all at one time.

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 the Employee Profile page.
2. Click **Roles** on the HR Administrator Main Menu page, then click **Change Tkp.** on the Role Management page.

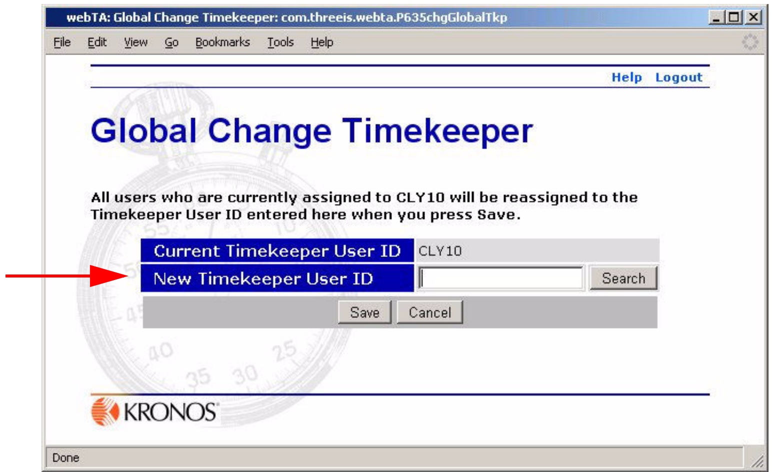
   The Global Change Timekeeper page opens.



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.

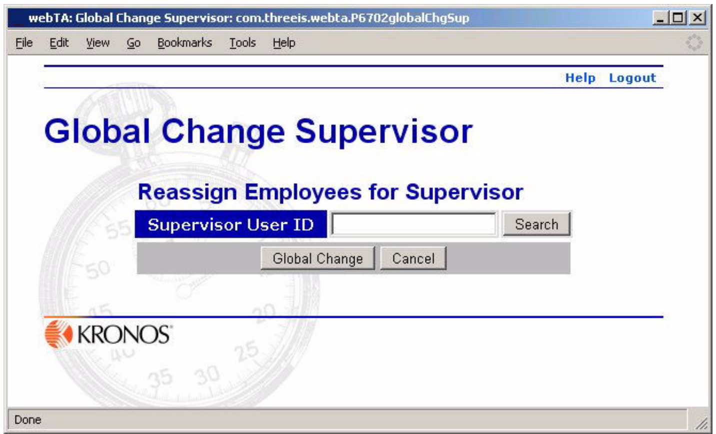
Use this function when a supervisor leaves an organization or is assigned to other duties.

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.

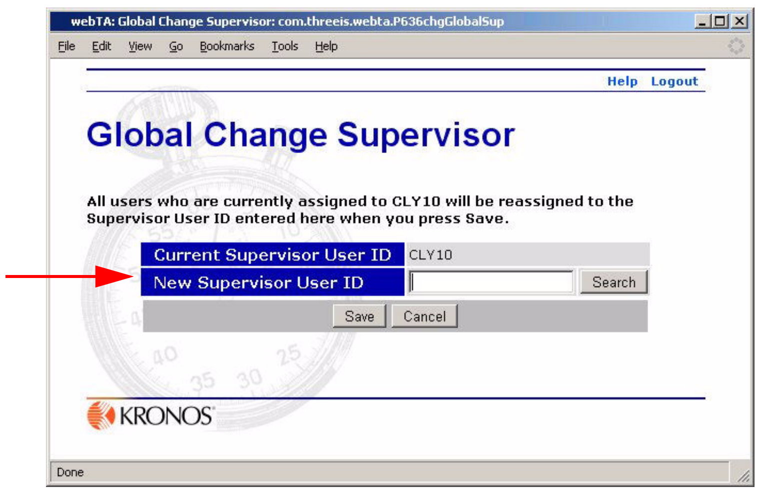
   The Global Change Supervisor page opens.



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 add or change account descriptions.

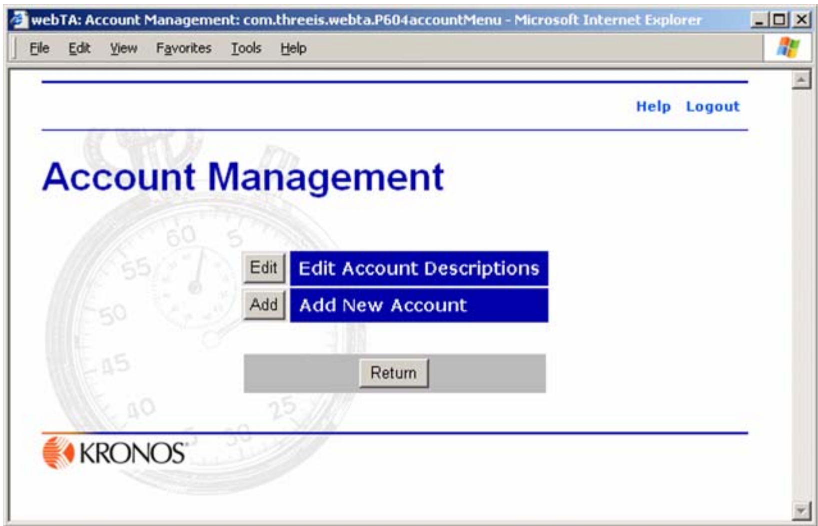
IMPORTANT! Employees and timekeepers can change account descriptions for their own personal use. These changes appear in both the employee and timekeeper account tables. However, they *do not* appear in the HR Administrator's account table; the original description entered by the HR Administrator *will not change* unless it is modified by the HR Administrator.

IMPORTANT! Employees and timekeepers *can not* add personal account descriptions unless an HR Administrator has already entered a description.

To create a new account:

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

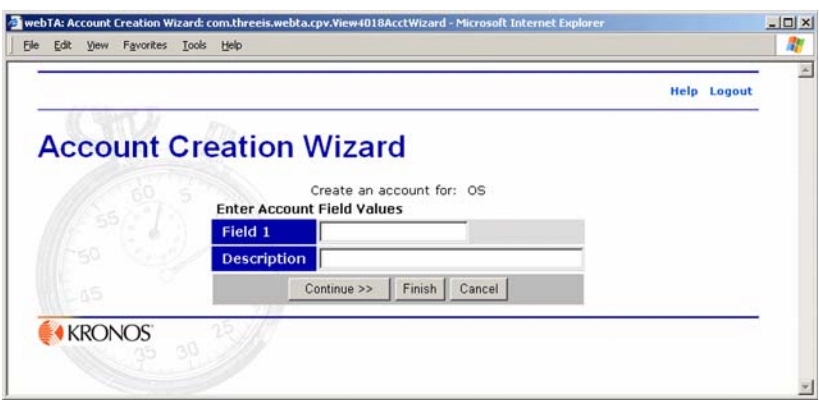
   The Account Management page opens.



   NOTE: This page may differ from the example, depending on your agency.

2. Click **Add**.

   The Account Creation Wizard page opens.



   NOTE: This page may differ from the example, depending on your agency.

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

IMPORTANT! Employees and timekeepers *can not* add personal account descriptions unless an HR Administrator has already entered a description.

4. Click **Continue**.

   webTA verifies that the account number conforms with the account structure requirements.

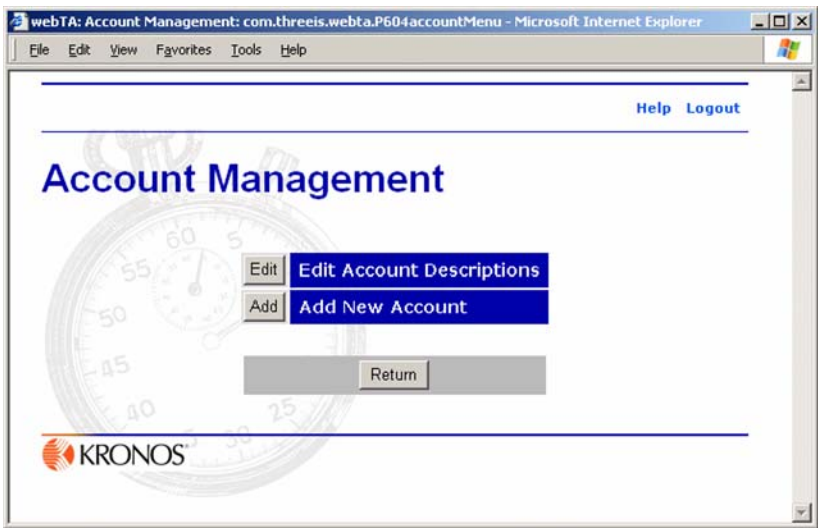
5. Click **Finish**.

   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.

NOTE: This page may differ from the example, depending on your agency.

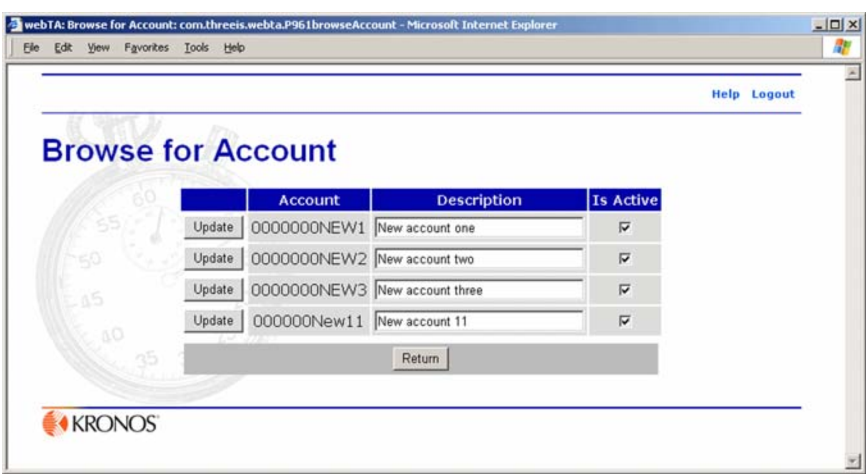
3. Type as much as you know of the account number and description in the **Field 1** and **Description** boxes.

   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.

IMPORTANT! “Personal” descriptions entered by employees or timekeepers in their own account tables are retained. Your changes do not affect these personal descriptions.

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 names, user IDs, their timekeeper's IDs, and their supervisor's IDs for employees with finalized timecards.
- *New Employee* lists new employee's names, user IDs, 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.)
- *Uncertified Timecards* lists employee names, and their user IDs, timekeeper's IDs, and supervisor's IDs, if the employee's timecard has not been certified.
- *Unvalidated Timecards* lists all unvalidated time cards for employees assigned to you.
- *FESI Extract for Agency* provides a downloadable FESI file containing built time card 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 time card 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 time card records for the most recently ended pay period in the database. Therefore, the report should show very few records.

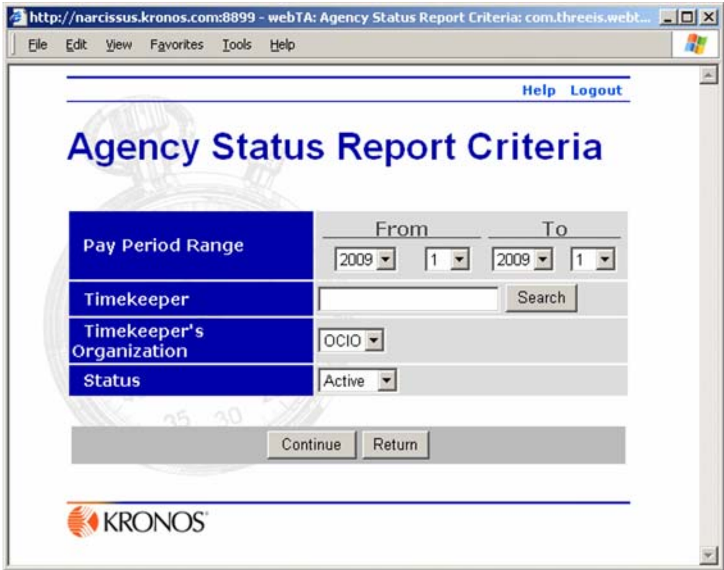
To generate the View Agency Status report:

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.



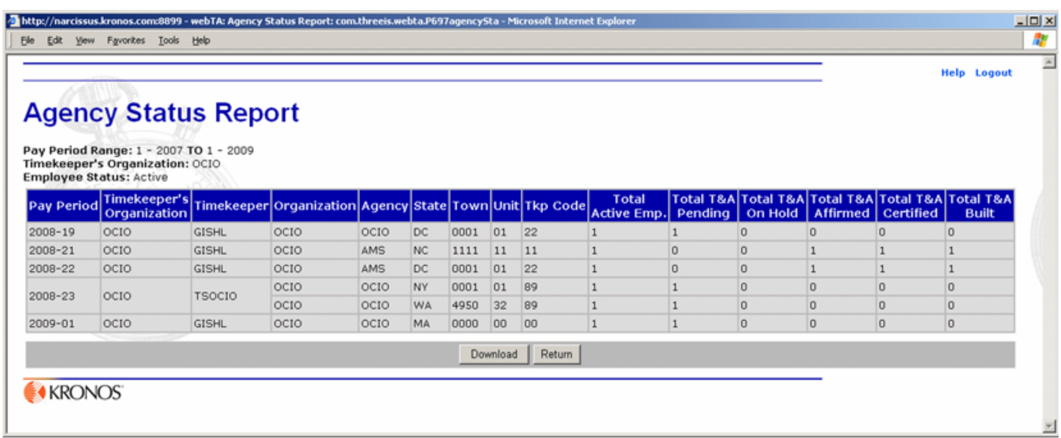
3. Select the beginning and ending dates for the pay period range and the status you want the report to be generated for.

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	Timekeeper's Organization	Timekeeper	Organization	Agency	State	Town	Unit	Tkp Code	Total Active Emp.	Total T&A Pending	Total T&A On Hold	Total T&A Affirmed	Total T&A Certified	Total T&A Built
2008-19	OCIO	GISHL	OCIO	OCIO	DC	0001	01	22	1	1	0	0	0	0
2008-21	OCIO	GISHL	OCIO	AMS	NC	1111	11	11	1	0	0	1	1	1
2008-22	OCIO	GISHL	OCIO	AMS	DC	0001	01	22	1	0	0	1	1	1
2008-23	OCIO	TSOCIO	OCIO	OCIO	NY	0001	01	89	1	1	0	0	0	0
			OCIO	OCIO	WA	4950	32	89	1	1	0	0	0	0
2009-01	OCIO	GISHL	OCIO	OCIO	MA	0000	00	00	1	1	0	0	0	0

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

   \- OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

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.

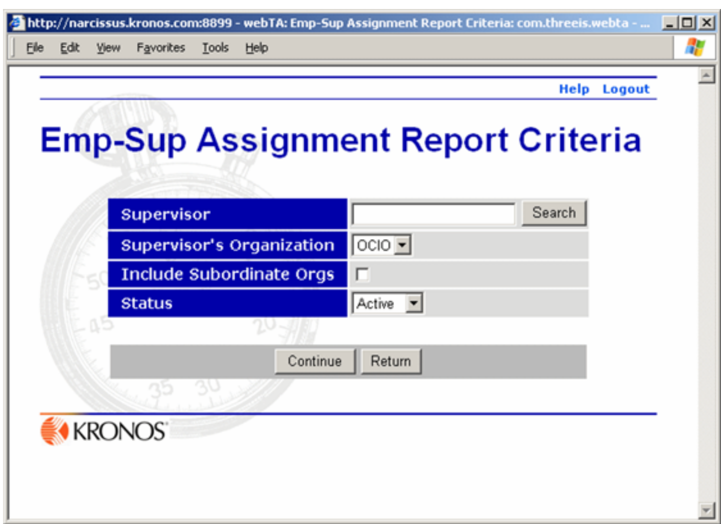
NOTE: If the HR Administrator does not have his organization set in his employee profile, then the report will be empty. Similarly, only those employees who have their organizations set in their employee profile will be displayed in the report.

To generate the Employee Assignment by Supervisor report:

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

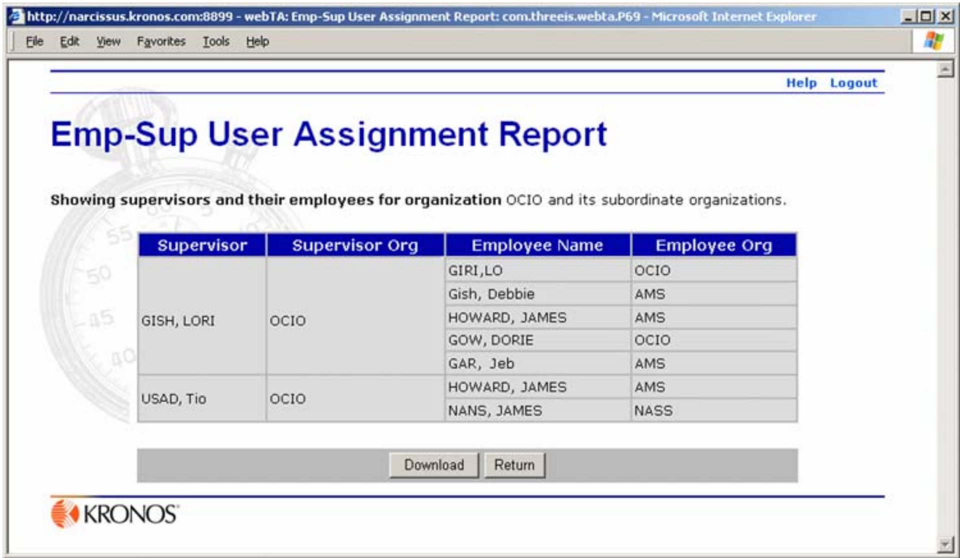
   The HR Administrator Reports Menu page opens.
2. Click **Emp-Sup**.

   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.
4. If you want to include the supervisor’s subordinate organizations, click to select the **Include Subordinate Orgs** check box.
5. Select the supervisor’s organization and status from the appropriate drop-down lists.
6. Click **Continue**.

webTA generates the Emp-Sup User Assignment Report


http://narcissus.kronos.com:8899 - webTA: Emp-Sup User Assignment Report: com.threeis.webta.P69 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Help Logout

Emp-Sup User Assignment Report

Showing supervisors and their employees for organization OCIO and its subordinate organizations.

Supervisor	Supervisor Org	Employee Name	Employee Org
GISH, LORI	OCIO	GIRI,LO	OCIO
		Gish, Debbie	AMS
		HOWARD, JAMES	AMS
		GOW, DORIE	OCIO
		GAR, Jeb	AMS
USAD, Tio	OCIO	HOWARD, JAMES	AMS
		NANS, JAMES	NASS

Download Return

KRONOS

7. If you want to open the report in Microsoft® Excel, click **Download**, then click **Open.**

   \- OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

The Employee Assignment by Timekeeper report

The Employee Assignment by Timkeeper 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.

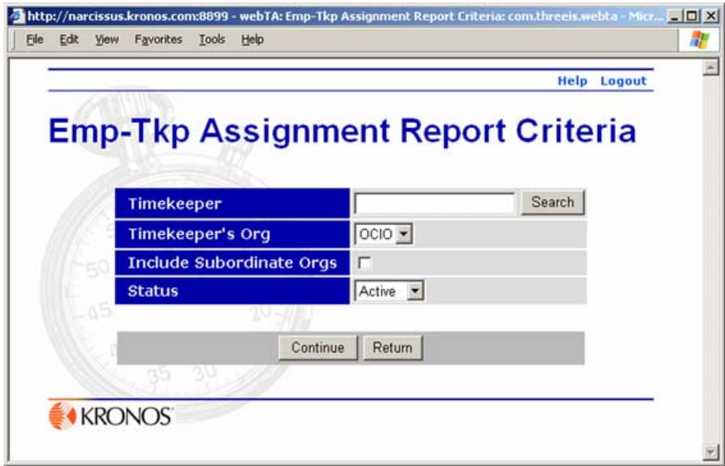
An HR Administrator can generate the report for his organization only. If HR Administrator does not have his organization set, the report will contain only employees with no organization set.

To generate the Employee Assignment by Timekeeper report:

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

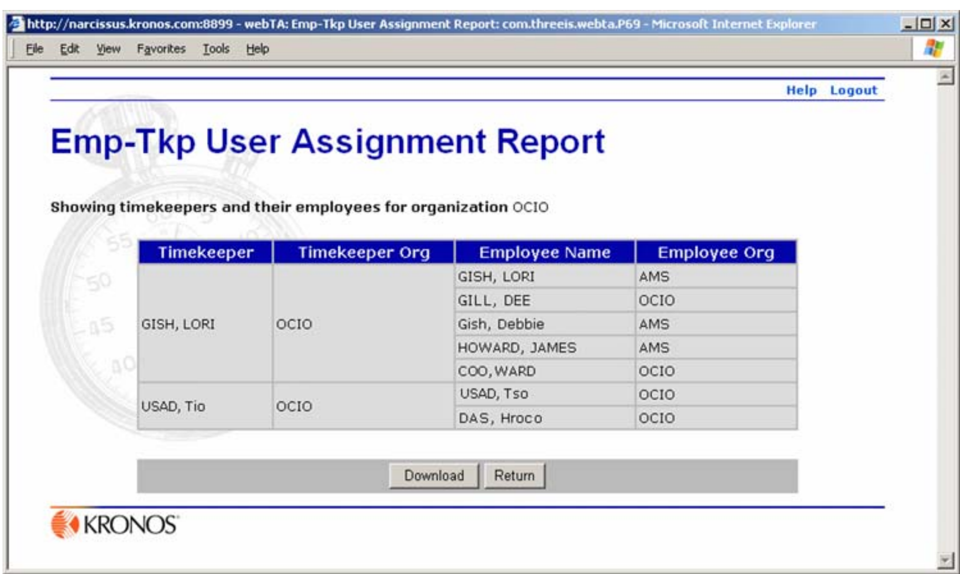
   The HR Administrator Reports Menu page opens.
2. Click **Emp-Tkp**.

   The Emp-Tkp Assignment Report Criteria page opens.



3. Type in the user ID, or search for and select, the timekeeper whose employee assignments you want to view, select the timekeeper's organization, and select the employee status from the **Status** list.
4. If you want to include the timekeeper's subordinate organizations, click to select the **Include Subordinate Orgs** check box.
5. Click **Continue**.

   webTA generates the Emp-Tkp User Assignment report.



6. If you want to open the report in Microsoft® Excel, click **Download**, then click **Open.**

   \- OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

The Active T&A report

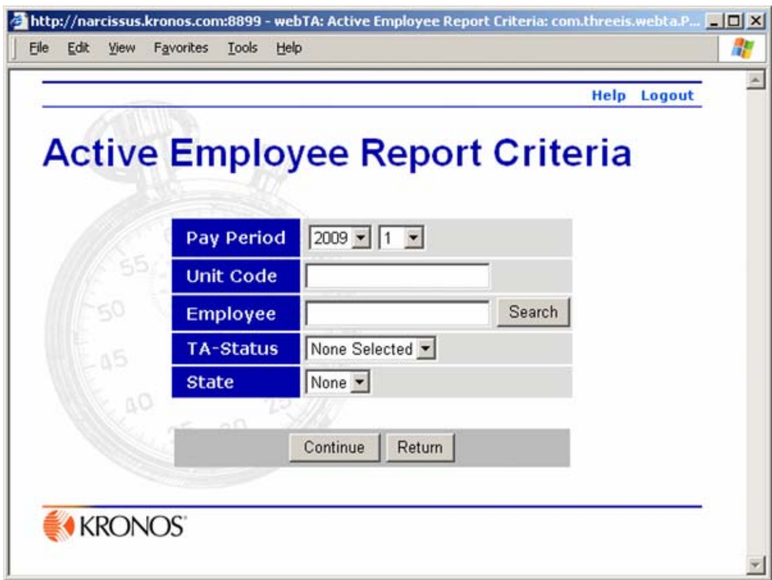
This report lists the current time card status for all employees in an HR Administrator's agency. This report only returns the currently active time cards. Results can be filtered by pay period, user ID, unit code, status, and state.

To generate the Active T&A report:

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

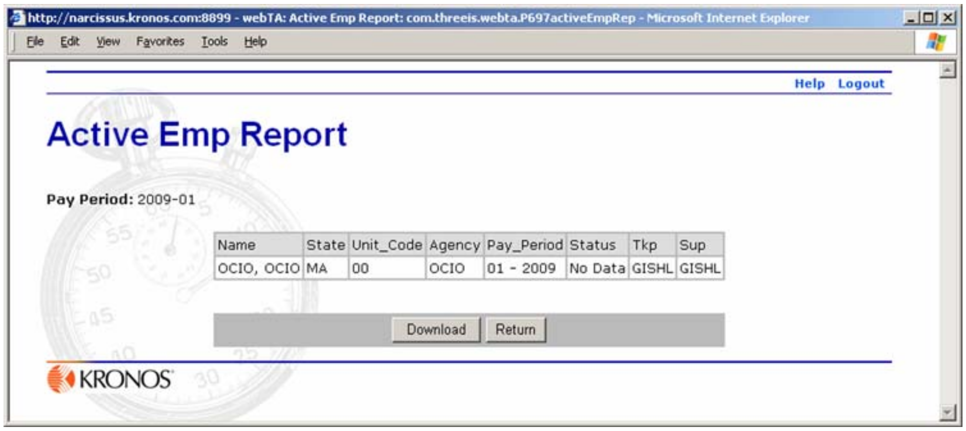
   The HR Administrator Reports Menu page opens.
2. Click **TA Listing**.

   The Active Employee Report Criteria page opens.



3. Filter the report result by selecting from the drop-down lists, typing in the text boxes, searching for and selecting the employee, and selecting the TA status and state from the drop-down lists, then click **Continue**.

   The Active T&A report opens.



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

   \- OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

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 codes, the name of the employees having the role selected, and their user IDs in the third column.

When the report is viewed by HR Administrator, results are restricted to the HR Administrator's organization only.

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 filter the report by role or organization, or include subordinate organizations, select from the appropriate drop-down lists and click to select the **Include Subordinate Organization** option, then click **Update.**

   The report changes to reflect your choices.

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

   - OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

The User Role Assignment 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.

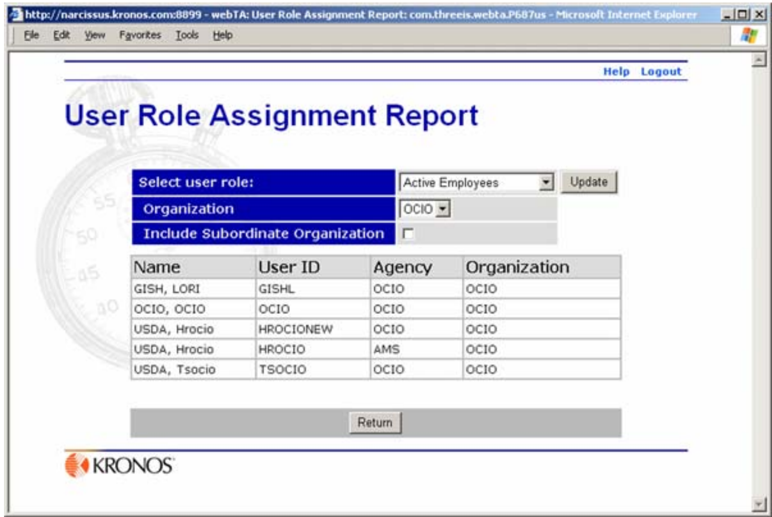
To generate the User Role Assignment report:

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 filter the results, select from the **Select user role** and **Organization** drop-down lists.
4. If you want to include subordinate organizations, click to select the **Include Subordinate Organizations** check box.
5. Click **Update**.

   webTA regenerates the report to reflect your choices.

The 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 time card (that is, they are retiring or have otherwise permanently left the organization.) These employees have **Is Final** checked on their T&A Profiles.

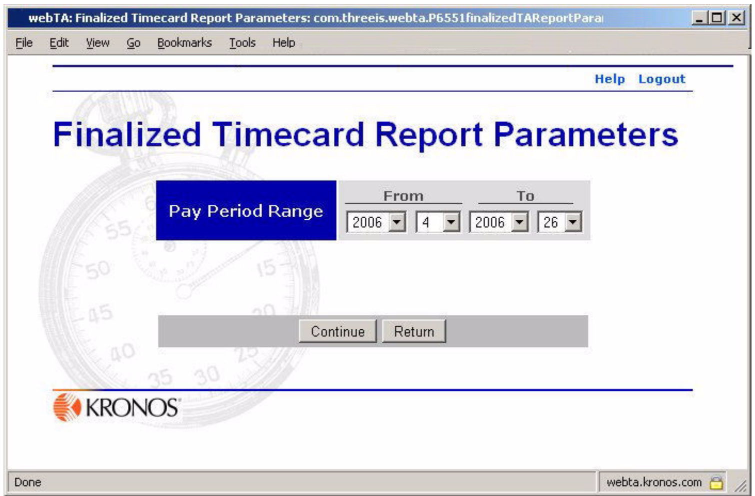
The report includes the timekeeper's name, and total number of active employees. It also shows Total T&A Pending, On Hold, Affirmed, Certified, and Built for those employees, within the designated pay period.

To generate the Finalized Timecards report:

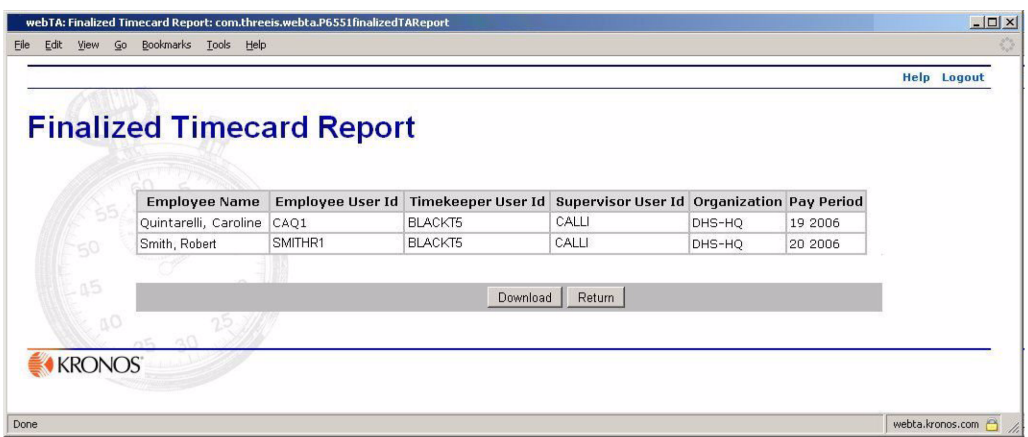
1. On the HR Administrator Main Menu page, click **Reports**.

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



6. If you want to open the report in Microsoft® Excel, click **Download**, then click **Open.**

   \- OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

The New Employee report

The New Employee report lists the names of the employee new to the system, their user ID, 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.

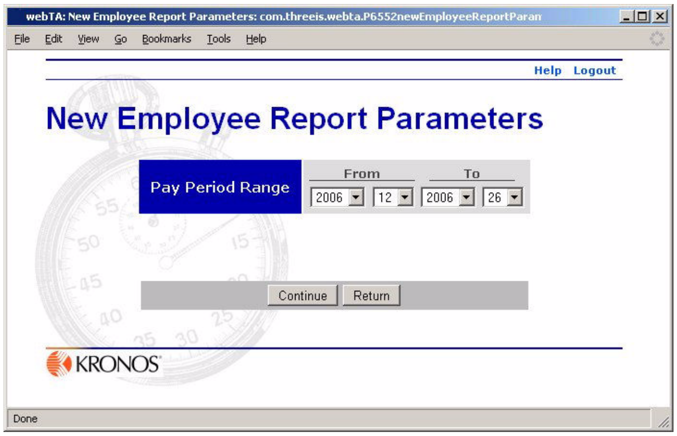
To generate the New Employee report:

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

   The HR Administrator Reports Menu page opens.

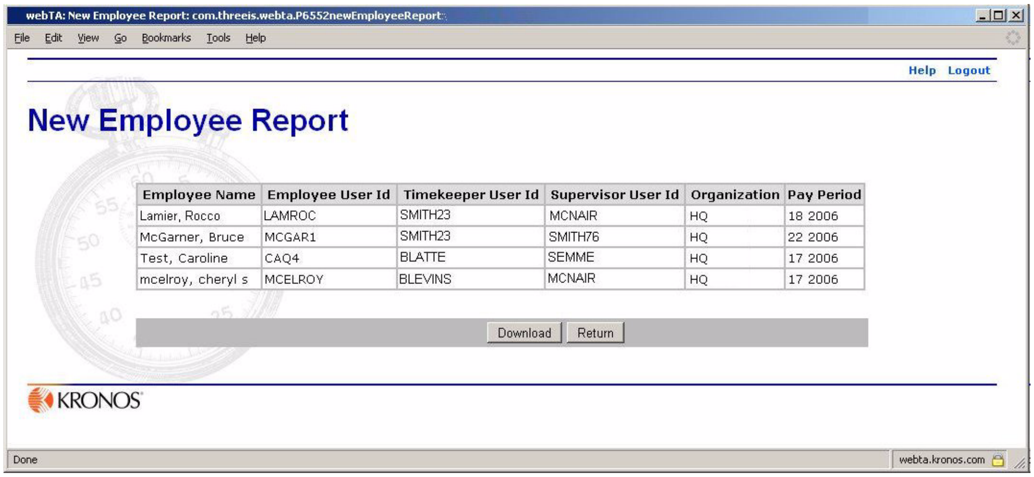
2. Click **New Emps**.

   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**, then click **Open.**

   \- OR -

If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

The Uncertified Timecards report

This report lists employees’ names, user IDs, 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.

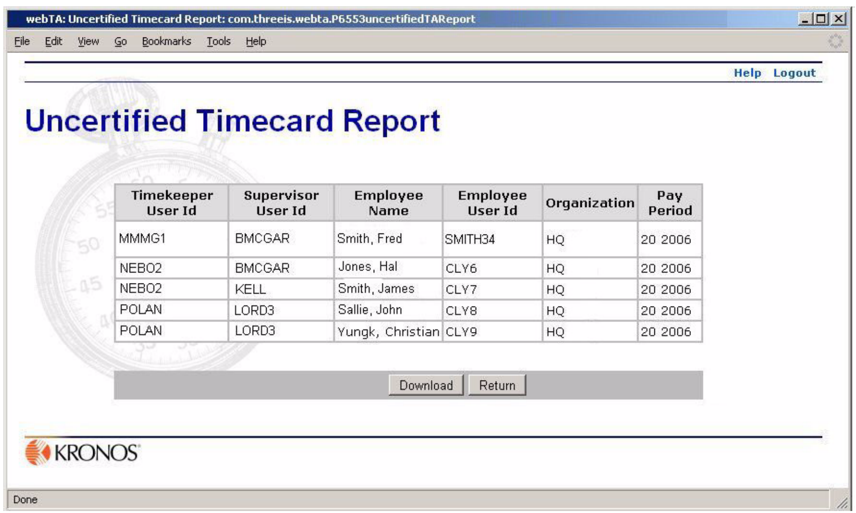
To generate the Uncertified Timecard report:

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**, then click **Open.**

   \- OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

The Unvalidated Timecards report

This report lists employee names, IDs, their timekeeper's IDs, and their supervisor's IDs of employees whose time cards have not been validated.

Results are restricted to the HR Administrator's organization.

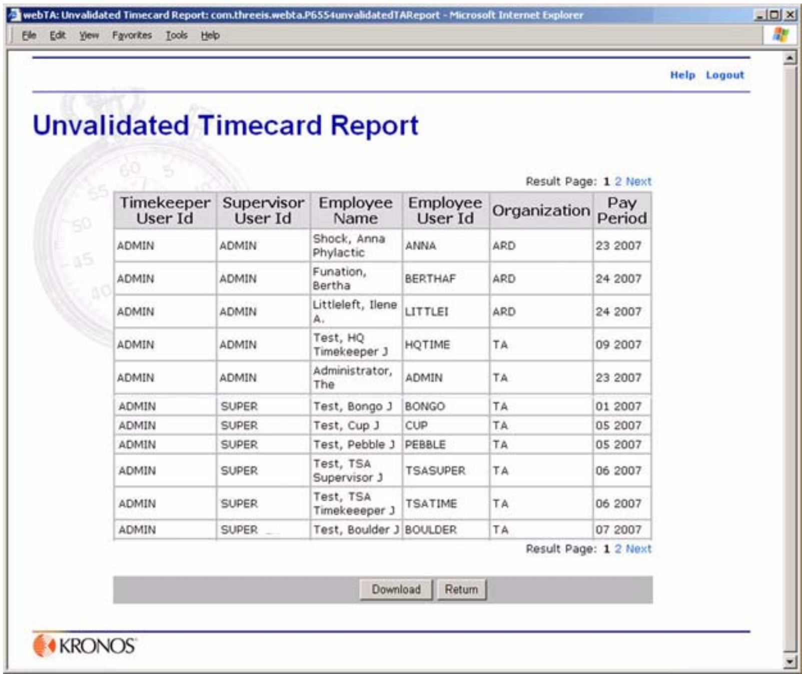
To generate the Unvalidated Timecards report:

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.



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

   \- OR -

   If you want to save the report in Microsoft Excel .XLS format, click **Download**, then click **Save**.

The FESI Extract for Agency report

This report lets HR Administrators view or download a FESI file containing the built time card 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.

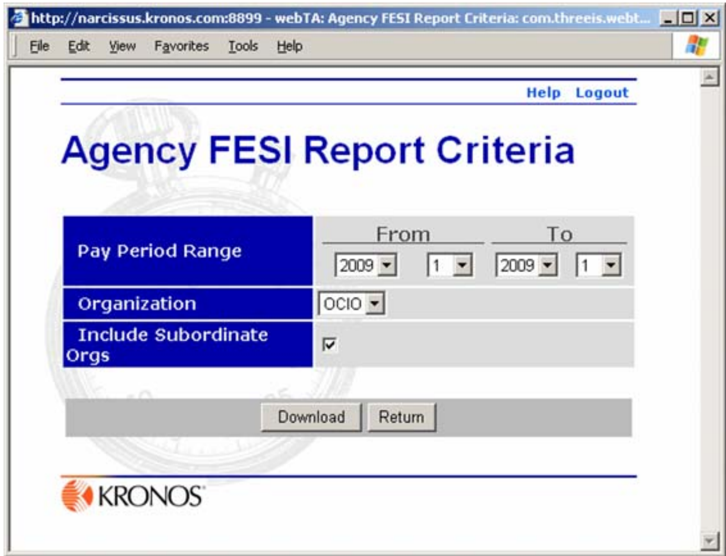
To generate the FESI Extract for Agency report:

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 employees' organization from the **Organization** list, and choose if you want to include subordinate organizations, then click **Download**.

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

4. Click **Save**

   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 -

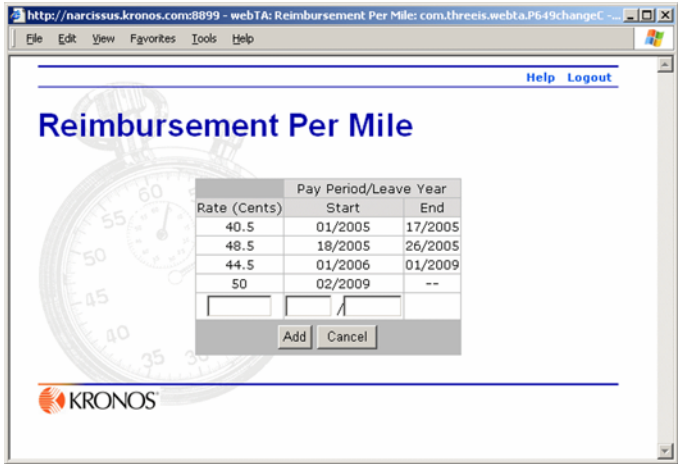
   If you want to save the file in .DAT format, click to select **Save**.

Setting mileage reimbursement

The compensation amount per mile that an employee receives for mileage transactions can be changed for future travel.

To change the reimbursement rate per mile:

1. On the HR Administrator Main Menu page, click **Mileage**.
2. The Reimbursement Per Mile page opens.



IMPORTANT: In the next step, you enter the new mileage rate and starting pay period. Be very careful not to type in incorrect information. Once the rate is changed, it cannot be corrected. If you make a mistake after adding the new rate, you can delete the entry after adding it by clicking **Delete**. However, you can delete only the last change made.

3. Type the new cents/mile amount in the **Rate (Cents)** column, and the pay period and year in the Pay Period/Leave Year **Start** column.

4. Click **Add**.

   webTA changes the mileage reimbursement rate to the amount and start pay period that you entered.

   webTA adds a **Delete** button to the Reimbursement Per Mile page.

5. If you want to remove the rate you just added, click **Delete**.

   webTA removes the rate from the list.

6. If you want to add additional rate changes, repeat Steps 3 through 5.

7. When you are finished adding new rates, click **Cancel**.