

# webTA 3.5

## Administrator's Guide

Version 1.0

## **Document History**

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## Introduction

The purpose of this document is to provide Administrators information needed to use *webTA* for fulfilling the Administrator role job functions using *webTA*. It is not intended to provide you with information about basic procedures such as logging in, searching for employees, or getting help. For information on how to use the basic functions of *webTA*, see the document *webTA* 3.5 *Basics*.

The Administrator is responsible for maintaining aspects of *webTA* that apply to all users. *webTA*, however, does not provide Administrators access to employee time and attendance data.

One of the responsibilities of the Administrator is to manage employee user accounts in *webTA*. Administrators can grant any role to an employee.

Administrator functions in *webTA* are accessed from the Administrator Main Menu page, which opens when you log on to *webTA*.



This page provides access to all of the functions of the Administrator.

IMPORTANT! *webTA* documents contain graphical representations ("screen shots") of many of the *webTA* pages that you will see as you use the application. These screen shots may not appear exactly

like the pages as they will on your own screen. They may differ in small details. However, they are similar enough to what you will see so that they will help you to work through the procedures and understand the examples in the documents.

## About employee profiles

The Employee Profile page is used when adding or modifying employee profiles.

When adding a new employee, the Employee Profile page opens when you click New.

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<b>Employee</b> Pro	file			
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me & Attendance system,	not to ot	her personnel records.		
User ID				
Password				
Password (agai	n)			
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First Name				
Middle Name or Initial (Option	aD			
Last Name				
		2		
Social Security	Number	r 🗌		
Supervisor's Us	er ID	ADMIN	Search	
Timekeeper's U	ser ID	ADMIN	Search	
STORE STORE STORE STORE				
Organization			Search	
First Pay Period		• Current • Previou	e	
in oct ay tonot		Current Previou	2	
Role	Select	Special Case		
Timekeeper	Γ	Self Validation		
Supervisor	Γ	Self Certification		
Master Timekeeper	Γ	<ul> <li>Read Only</li> <li>Restrict to Agency</li> </ul>		
Master Supervisor		Restrict to Agency		
Project Manager				
HR Administrator	Г			
Administrator		_		
Active Status		Active Employee		
	Sav	e Cancel		
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When modifying employee profiles, the Employee Profile page for the employee opens when you click **Search**, then select the employee after he or she is located.

The Employee Profile includes these sections:

- User ID and password fields
- First, middle, and last name fields
- Social Security number
- Supervisor's user ID
- Timekeeper's user ID
- Organization
- First Pay Period
- Roles options
- Active Status

## User IDs

User IDs may be up to 32 characters long.

A user ID must be unique. If you try to save the information with a user ID that already exists, you will see an error message.

## Passwords

User passwords may be as many as 32 characters long.

Passwords should not be easy to guess. Avoid using proper names, birthdays, and other significant dates, or any name or number easily associated with the employee. (The best passwords are random alphanumeric strings.)

If your organization has password policies, they may be enforced in *webTA*. Some password policies may require:

- A minimum length
- Both alphabetic and numeric characters
- Upper and lower case characters
- Special characters

Some policies may also prohibit passwords derived from common words or alphanumeric sequences

## **First Pay Period**

This option lets you specify the pay period to which the new record applies.

If the person started within the current pay period, select **Current**. If the person started in the previous pay period, select **Previous**.

## Roles

Access to various modules of *webTA* is controlled by roles. Everyone in the system is considered an employee. However, access to some *webTA* functions depends on the role of the employee:

- Timekeepers edit or correct T&A data, addresses, phone numbers, and e-mail addresses, validate time cards, edit leave totals, and reset passwords for a specified set of employees.
- Master Timekeepers can perform the same functions as Timekeepers except that, in addition, they can change the employee's agency, and override validations
- Supervisors review and certify T&A reports and leave or premium pay requests for a given set of employees.
- Master Supervisors may certify T&A reports for any employee within *webTA* before their data is sent to NFC for payroll processing, though this is not required if Supervisors have completed the task.
- HR Administrators manage employees and the leave transfer programs.
- Administrators perform system maintenance functions, such as adding users, assigning roles, scheduling and building transmission files, and configuring the system.

IMPORTANT: Some Master Timekeeper and Master Supervisor role assignments are agency-specific. *webTA* functions used by those with agency-specific roles are restricted to employees in their own agencies. Also, there is an additional Master Timekeeper read-only role that restricts those assigned to it to viewing employee data, but not adding to, removing, or changing it, and a Supervisor role that lets Supervisors certify their own time cards.

#### **Active Status**

The **Active Status** check box on the Employee Profile page, by default, indicates that the employee is active. If an employee becomes inactive, click to clear the check box.

When employees are made inactive, only unsubmitted time card data is deleted from the system, but they will no longer be able to log into the T&A system, and their records will be 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 a new *webTA* user record for the returning employee.

To access the record for an inactive user, select **Inactive** from the Status list on the Search for Employee page.

The process for reactivation is similar to editing an employee profile. First, select the employee that you want to reactivate using the search function. The search function is the same as that for editing employee profiles, but only inactive records are searched. Once you select the record to reactivate, assign the correct Timekeeper and Supervisor, assign the appropriate roles, and click to select the **Active Employee** check box. Then click **Save**.

You must click **Save** to preserve your changes. You may click **Cancel** if you do not want to save the changes.

## Adding an employee

Adding an employee is similar to searching for an employee, except that you enter new information on a blank Employee Profile page.

#### To add a new employee:

1. On the Administrator Main Menu page, click New.

A blank Employee Profile page opens.

			Heln	Logout
Zee The second			neip	Logout
mployoo Pro	file			
mployee Pro	me			
ease note that this data pe ne & Attendance system,	ertains or	nly to employee access	for the	
11/5 55		ner personner records.		
User ID				
Password				
Password (agai	in)			
00 2	5.111			
First Name				
Middle Name	- 22			
or Initial (Option	al)	,		
Last Name		1		
0 1 0 - 1				
Social Security	Number			
Supervisor's Us	AN TO	ADMIN	Search	
Timekeeper's L	ISEF ID	ADMIN	Search	
Organization			Search	
organization		<b>_</b> ]	Jearch	
First Pay Period		← Current ← Previou	5	
			-	
Role	Select	Special Case		
Timekeeper	Γ	Self Validation		
Supervisor	Γ	Self Certification		
Master Timekeeper	Γ	Read Only     Restrict to Agency		
Master Supervisor		Restrict to Agency		
Project Manager	Γ			
HR Administrator	Г			
Administrator				
Active Status		Active Employee		
Store States States				
	Save	Cancel		

2. Type the new user ID, password, first and last names, a user ID, and the employee's Social Security number in the appropriate boxes.

An employee's first and last names must be in separate fields. Do not combine first and last names in one field. You may include a suffix, such as Jr. or III, in the **Last Name** field.

NOTE: User IDs and passwords may be up to 32 characters long. The user ID must be unique in *webTA*.

- 3. Type in, or search for and select, the employee's Supervisor and Timekeeper user IDs.
- 4. Type in, or search for and select, the organization that the employee is to be associated with.
- 5. In the **Roles** area, click to select the appropriate roles for the employee.

NOTE: When selected, the Read Only option associated with the Master Timekeeper role gives the Master Timekeeper viewing privileges for timekeeping records, but not editing privileges.

6. Click Save.

## **Reactivating an employee**

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

#### To reactivate an inactive employee:

1. Search for the employee you want to reactivate using *webTA*'s search function, selecting **Inactive** as one of the search criterion.

The Search Results page opens listing only inactive employees.

2. Click to select the employee you want to reactivate, then click Emp Profile.

The Employee Profile page for the selected employee opens.

- 3. If necessary, change the profile by assigning a Timekeeper and Supervisor, appropriate roles, and so forth.
- 4. Click to select the Active Employee check box.



5. Click Save.

*webTA* returns you to the Search Results page. The employee you reactivated no longer appears in the list of search results for an inactive employee.

## Modifying an employee profile

## To modify an employee profile:

- 1. Search for the employee whose profile you want to modify using *webTAs* search function.
- 2. Click to select the employee from the search results list, then click **Emp Profile**. The employee's Employee Profile page opens.

1 63	0.5119655			Help	Logout
	20				
Emp	loyee Pro	file			
			ly to employee access	for the	
fime & At	tendance system, i	not to oth	er personnel records.		
	User ID		MALONEY9889		
	Password		*****		
	Password (agai	n)	*****		
	2	1/10//			
	First Name		Yvonne		
	Middle Name	100			
	or Initial (Option	al)			
	Last Name		Malone		
	Social Security	Number	788-99-9889		
	Supervisor's Us	er ID	ORNELASL	Search	
	Timekeeper's U	ser ID	ORNELASL	Search	
	Organization		TSA	Search	
	Role	Select	Special Case		
	Timekeeper Supervisor		<ul> <li>Self Validation</li> <li>Self Certification</li> </ul>		
			Read Only		
	Master Timekeeper		Restrict to Agency		
	Master Supervisor		Restrict to Agency		
	Project Manager				
	HR Administrator				
	Administrator				
	Active Status		Active Employee		
		Save	Cancel		

3. Type the new information in the appropriate boxes and click to select the appropriate check boxes.

An employee's first and last names must be in separate fields. Do not combine fields. You may include a suffix, such as Jr. or III, in the **Last Name** field.

NOTE: Supervisor's User ID, Timekeeper's User ID, and Organization for the employee may be selected by clicking the **Search** button next to the appropriate box, then searching for the name or selecting from the list of organizations.

4. Click Save.

## **About Build Maintenance**

When transmission files are built, they are sent to the payroll office for processing.

Transmission files can be built automatically, or built on demand.

## Building a transmission file

When a build is run, transmission records are created for all certified employees in the system (unless their time cards are in a future pay period). Supervisors cannot certify or decertify records while a build is in progress.

You can build a transmission file at any time. All certified records for the current pay period are built.

NOTE: *webTA* only processes records for pay periods that have ended, unless there is an early build. Only by using the Early Build function can records in the current pay period be built.

## To build a transmission file manually:

1. In the Administrator Main Menu, click Build.

The Build Maintenance page opens:

DUILIN			Help	Logout
Build Ma	ainter	hance		
C	urrent web	<b>FA Payperiod: 20</b> : 10/1/06 to 10/14/06		
55	Build	Build Transmission File Now		
	Early	Early Build		
	Schedule	Schedule Build		
	History	Build History		
	Compare	Compare Transmission File		
	Industrial Arts			
		Return		

## 2. Click Build.

The build starts.

When the build is complete, a message tells you that the build completed successfully.

3. Click OK.

## Re-transmitting after a transmission error

If *webTA* is configured to transmit the file, and a transmission error occurs, you can transmit the file again.

#### To re-transmit a build file:

1. On the Administrator Main Menu page, click Build.

The Build Maintenance page opens.

Build N	<i>lainte</i>	nance	
	Current web	TA Payperiod: 20 : 10/1/06 to 10/14/06	
	Build	Build Transmission File Now	
	Early	Early Build	
	Schedule	Schedule Build	
	History	Build History	
	Compare	Compare Transmission File	
	Indenderland a Ale		
		Return	

2. Click Build History.

The Build History page opens.

. 6			2			
Bui	Id H	istor	У			
	1					
Lis	st of si	uccess	ful build	s		
	Build ID	PP - LY	<b>Build Time</b>		T&A Built	NFC Job Action
۲	221	19 - 2006	Oct 05 200	6 (09:58:05)	1	Download
С	181	18 - 2006	Sep 20 200	6 (16:37:33)	2	Download
С	162	18 - 2006	Sep 18 200	6 (09:53:41)	З	Download
С	141	17 - 2006	Sep 15 200	6 (16:16:03)	1	Download
C	121	17 - 2006	Sep 15 200	6 (15:53:15)	1	Download
C	101	17 - 2006	Sep 15 200	6 (13:07:55)	1	Download
С	61	17 - 2006	Sep 15 200	6 (10:00:50)	1	Download
С	41	17 - 2006	Sep 06 200	6 (16:04:08)	1	Download
С	22	17 - 2006	Sep 06 200	6 (15:09:24)	2	Download
		(	Re)transmit	Summary	Return	
		· · · · ·				

- 3. Click to select the build you want to re-transmit.
- 4. Click (Re)transmit.

The build data set is re-transmitted to the location configured as the transmission destination.

## Building a transmission file early

The Early Build function lets you create a transmission file during the second week of the current pay period to include the records from that period. This function is used in circumstances that require a build to occur on the Friday of the second week of the current pay period.

## To build a transmission file early:

1. On the Administrator Main Menu page, click **Build**.

The Build Maintenance page opens.

F	Bu	ild	N	laiı	nt	en	ance	
				- an				
				Curre	nt w	ebT.	A Payperiod: 20 : 10/1/06 to 10/14/06	
					Bu	ild	Build Transmission File Now	
					Ea	rly	Early Build	
				S	ched	ule	Schedule Build	
					Histo	ory	Build History	
				C	ompa	are	Compare Transmission File	
				Ind do h				
							Return	

2. Click Early.

webTA asks you if you're sure that you want to process the build before the end of a pay period.

🕽 webTA: Perfo	orm Early Build: com.threeis.webta.P206earlyBuild - Mozilla Firefox	
<u>File E</u> dit <u>V</u> ier	v <u>G</u> o <u>B</u> ookmarks <u>T</u> ools <u>H</u> elp	
	Help Logout	
	Perform Early Build	
	The early build feature will perform a build for all certified records in the CURRENT pay period as well as for any prior pay period. New records created will be created as usual for each employee built, but it will be for the next pay period.	
	Early Build Cancel	
	KRONOS /	-
one		webta.kronos.com 🖰

3. If you want to continue with the build, click **Early Build**.

All certified T&A records for the current or prior pay periods are processed.

## About scheduled builds

Scheduled builds are performed in the first week of a new pay period. They may be scheduled for Sunday through Saturday on the hour from midnight until 11:00 p.m.

There is no limit to the number of scheduled builds you can set up, but they should not be done too frequently because they interfere with other processing. It is best to schedule builds at off-hours, such as very early morning.

## To schedule a build:

1. On the Administrator Main Menu page, click Build.

The Build Maintenance page opens.

Build M	lainter	nance	
	Current web	TA Payperiod: 20 : 10/1/06 to 10/14/06	
	Build	Build Transmission File Now	
	Early	Early Build	
	Schedule	Schedule Build	
	History	Build History	
	Compare	Compare Transmission File	
	And I had a	Return	

2. Click Schedule.

The Schedule Build page opens.

Sched	ule Build			
	Select up to 3	times to schedi	ule a build for.	
		Day	Time	
	Transmission	No Selection 💌	No Selection 💌	
	Transmission	No Selection 💌	No Selection 💌	
	Transmission	No Selection 💌	No Selection 💌	
	Next Build Time	: (No scheduled I	builds)	
		Save Return		

3. From the table, for each build, select the day of the week and time you want the build to occur, then click **Save**.

The builds are scheduled and a new line is created in the Schedule Build table for adding an additional scheduled build.

#### To remove a scheduled build:

1. On the Administrator Main Menu page, click Build.

The Build Maintenance page opens.

Bu	ild N	lainte	nance	10000	
		Current un	bTA Payperiod: 20 : 10/1/06 to 10/14/06		
		Buil	103		
		Earl			
		Schedul			
		Histor	Build History		
		Compar	Compare Transmission File		
		Andred Sheet	Return		

2. Click Schedule.

The Schedule Build page opens.

1		5			
Sched	lule Build				
	Select up to 5	times to sch	edule a build	for.	
		Day	Time		
	Transmission	Sunday	• 2 AM	-	
	Transmission	Monday	• 3 AM	•	
	Transmission	Tuesday	• 2 AM	•	
	Transmission	Saturday	9 PM	•	
	<b>Transmission</b>	No Selection	💌 🛛 No Selecti	on 💌	
	Next Build Time	: Tuesday, No	ov 14, 2 AM		
		Save Retu	rn		
KRON					<u> </u>

3. For the scheduled build that you want to remove, in the **Day** column, select **No Selection**, then click **Save**.

webTA removes the scheduled build from the system.

When the scheduled builds are changed on this screen, they remain at the new settings until they are changed again. You must click the **Save** button to save changes before they will take effect.

## **About Build History**

When a build process runs, the records are stored in a database table. From the Build History page you can review build results, download the transmission file to a disk drive, or re-transmit the file, if necessary (for example, if a transmission error occurred).

To open the Build History page, click **Build History** on the Administrator Main Menu page.

181 18 - 2006 Sep 20 2006 (16:37:33) 2 Dov	Action Download
221         19 - 2006         Oct 05 2006 (09:58:05)         1         Dov           181         18 - 2006         Sep 20 2006 (16:37:33)         2         Dov	Download
181 18 - 2006 Sep 20 2006 (16:37:33) 2 Dov	
	Download
162 18 - 2006 Sep 18 2006 (09:53:41) 3 Dov	
	Download
141 17 - 2006 Sep 15 2006 (16:16:03) 1 Dov	Download
121 17 - 2006 Sep 15 2006 (15:53:15) 1 Dov	Download
101 17 - 2006 Sep 15 2006 (13:07:55) 1 Dov	Download
61 17 - 2006 Sep 15 2006 (10:00:50) 1 Dov	Download
41 17 - 2006 Sep 06 2006 (16:04:08) 1 Dov	Download
22 17 - 2006 Sep 06 2006 (15:09:24) 2 Dov	Download

In the list of successful builds:

- **Build ID** shows the unique identifier for each build.
- **PP LY** shows the pay period and leave year when the T&As were built.
- **Build Time** shows the date and time of the build.
- **T&A Built** shows the number of time cards submitted and built.
- **NFC Job** shows the JES Job Number, as returned by NFC at the time of submission. If the job has been transmitted multiple times, all Job Numbers are listed in this column, with the most recent transmission listed first.
- Action shows the actions available for the build. Downloading the build file is currently the only action available.

## To download a build history:

- 1. If you have not already done so, open the Build Maintenance page by clicking **Build** on the Administrator Main Menu page.
- 2. On the Build Maintenance page, click History.

The Build History page opens.

		У			
List o	f success	ful builds			
Buil	d ID PP - LY	Build Time		T&A Built	NFC Job Action
· 23	21 19 - 2006	0 Oct 05 2006	(09:58:05)	1	Download
C 10	81 18 - 2006	5 Sep 20 2006	(16:37:33)	2	Download
0 10	52 18 - 2006	5 Sep 18 2006	(09:53:41)	3	Download
C 14	41 17 - 2006	Sep 15 2006	(16:16:03)	1	Download
O 13	21 17 - 2006	5 Sep 15 2006	(15:53:15)	1	Download
O 10	01 17 - 2006	5 Sep 15 2006	(13:07:55)	1	Download
C 6	1 17 - 2006	5 Sep 15 2006	(10:00:50)	1	Download
O 4	1 17 - 2006	5 Sep 06 2006	(16:04:08)	1	Download
C 2	2 17 - 2006	5 Sep 06 2006	(15:09:24)	2	Download
		(Re)transmit	Summary	Return	
0 2	2 17 - 2006	5 Sep 06 2006	(15:09:24)	2	Downloa

The columns show the name, Social Security Number, pay period and year, if the record is a correction (CORR), and if the record is a continuation (CONT).

3. On the Build History page, click the **Download** link next to the build whose transmission file you want to download.

webTA asks you for a file name and location to save the file.

4. Either accept the existing file name or type in a new file name, then either type in the path for the saved file or browse for the location by clicking **Browse** and selecting a location from the folder tree.

IMPORTANT! If you change the name of the existing file name, you must include in the new name the correct extension for the file, usually **.DAT**.

5. Click Save.

NOTE: The exact method of saving files varies, depending on the browser you are using.

#### To view a summary of builds:

1. If you have not already done so, open the Build History page by clicking **Build** on the Administrator Main Menu page.Click **History**.

The Build History page opens.

Sui	Id H	istor	У			
Lis	st of su	uccess	ful buil	ds		
	Build ID	PP - LY	Build Tin	1e	T&A Built	NFC Job Action
	221	19 - 2006	Oct 05 20	006 (09:58:05)	1	Download
С	181	18 - 2006	Sep 20 21	006 (16:37:33)	2	Download
С	162	18 - 2006	Sep 18 20	006 (09:53:41)	З	Download
С	141	17 - 2006	Sep 15 2	006 (16:16:03)	1	Download
С	121	17 - 2006	Sep 15 2	006 (15:53:15)	1	Download
С	101	17 - 2006	Sep 15 2	006 (13:07:55)	1	Download
С	61	17 - 2006	Sep 15 2	006 (10:00:50)	1	Download
С	41	17 - 2006	Sep 06 21	006 (16:04:08)	1	Download
С	22	17 - 2006	Sep 06 21	006 (15:09:24)	2	Download
		_(	Re)transmi	t Summary	Return	

 Click to select the build history you want a summary of, then click Summary. The Build History Summary page opens for the history you chose.

Edit	⊻iew	Go	Bookmarks	Tools	Help					
8	1.60	1991						Help	Logout	
D			11: . 4	_	C					
В	ull	d	Histo	ory	Summa	ary				
		0	20 2	Proprietante	1					
		•	Vame		SSN	PAYPERIO	CORR	CONT		
		C	UINTAREL	LI, CAR	OLI 777-88-9999	9 19	No	No		
					Return	1				
						1				
				25	1.010					
				2	27117 THE					
			05	25						
	KR	NC	OS 30	25	<u> </u>					

## **Comparing transmission files**

After payroll records have been processed by NFC, you can compare the transmission records on file at NFC with the data contained in *webTA*.

NOTE: Transmission file comparison is not required for normal payroll operations in *webTA*. It is only used when you must ensure that existing transmission files match the transmission records contained in *webTA*.

#### To compare a transmission file:

1. Click **Build** on the Administrator Main Menu page.

The Build Maintenance page opens.

2. Click Compare.

The Upload Transmission File page opens.

-	ransmission File: com.threeis.webta.P218xmitCompUpload - M	ozilla Firefox 📃 🗋 之
<u>File Edit View 9</u>	<u>5</u> o <u>B</u> ookmarks <u>T</u> ools <u>H</u> elp	
( ANT	111/1005	Help Logout
Upload	Transmission File	
	ad an existing transmission file and verify that e ches the record as stored within webTA.	ach record contained
in the file file		
	Se	
	Transmission File Bro	IWSE
	Compare Cancel	
	35 30	
<b>KRONC</b>	DC.	
<b>ENKONC</b>	)5	
Done		webta.kronos.com 😑

3. Type the location of the file in the **Transmission File** box.

If you do not know the file's location, click **Browse** to find it on your computer.

4. Click Compare.

The result of the comparison appears in the **Status** column of the Transmission File Comparison page.

Three results are possible for this comparison.

- The transmission records you upload fail to match any records contained in *webTA*. This can happen if you try to compare an old file, such as one generated outside of *webTA*.
- *webTA* finds an associated payroll record, but the transmission records contained in *webTA* do not match the data in the transmission file.

This indicates that either the transmission file has been changed or that a newer record has since been generated in *webTA*. In this case, you must manually compare the two records to determine the differences. The comparison results page identifies the appropriate build number, so you can download the corresponding transmission file from the build history page.

• *webTA* determines that the two records match exactly.

This indicates that the most recent build of payroll records for the employee for that pay period matches the file you transmitted.

## About configuring webTA

The Configure webTA page lets Administrators configure certain aspects of webTA, such as messages and password policies.

webTA: Configure webTA: com.threeis.webta.P261configMenu - Mozilla Firefox e Edit View Go Bookmarks Tools Help	_
Configure webTA	Help Logout

Messages | Login and Banner Message Policy Configure Password Policy License License Management

Tasks/Email FTP Build File FTP Audit Audit Management Session Management

Holiday Management

s.com 🗎

Return

The Configure webTA page opens by clicking Configure on the Administrator Main Menu page.

KRONOS'	

Tasks

Session Holiday

## Changing login and banner messages

The login message appears on the webTA Login page.

 This is	the DHS 3.5	Demo zone	2		
Please e	nter your User I	ID and Passw	ord for the Tim	e & Attendance	system:
	User ID	admin			
	Password (password is cas		7		
	au 25 30	22/11/	ĩ		

The banner message appears at the top of each page in *webTA*.

W	ebTA Log	ain		
ornere o	s is the DHS 3.5			
	se enter your User		& Attendance sy	stem:
	User ID	admin		
	Password	*****		
	(password is ca	se-sensitive)		
		Log In		

Password instructions appear on the Change Password pages for all roles.

	😻 webTA: Change Employee Password: com.threeis.webta.P390chgPW - Mozilla Firefox	
	<u>Fi</u> le <u>E</u> dit <u>V</u> iew <u>Go</u> <u>Bookmarks</u> <u>Y</u> ahoo! <u>T</u> ools <u>H</u> elp	0
		Help Logout
Password instructions ——	<section-header><section-header><section-header><text><text><list-item><list-item><list-item><list-item><list-item><list-item><list-item><list-item><list-item><list-item><list-item></list-item></list-item></list-item></list-item></list-item></list-item></list-item></list-item></list-item></list-item></list-item></text></text></section-header></section-header></section-header>	om the er.

You can change login, banner, or password messages to provide information or important announcements for users of the system.

## To change login, banner, and password instruction messages:

1. Click **Configure** on the Administrator Main Menu page.

The Configure webTA page opens.

-	5		Help	Logout
Config	ure we	DIA		
	Messages	Login and Banner Messages		
	Policy	Configure Password Policy		
	License	License Management		
	Tasks	Tasks/Email		
	FTP	Build File FTP		
	Audit	Audit Management		
	Session	Session Management		
	Holiday	Holiday Management		
		Return		
-	)S			

## 2. Click Messages.

The Configure Messages page opens.

	ssages
	The message that appears at login: (1024 chars max)
Login Message	This is the DHS 3.5 Demo zone
Banner Message	The message shown at the top of every page: (1024 chars max) WEBTA DHS DENO
	The message that appears on the change password pages: (1024 chars max)
Password Instructions	Please follow DHS password creation policy. >       The password must include: <ul> <li>&gt;     &gt;       <li>&gt;     &gt;       &lt;</li></li></ul>
	<li>A nonnumeric character in the first and last positions of the password.</li>

3. In the appropriate text boxes, either edit the existing message or type in a new message.

You can use any standard HTML tags to format the message, including links to other Web sites and figures.

IMPORTANT! Make sure that the password instructions accurately describe your organization's password policy.

## **Configuring password policy**

As Administrator, you can configure password policies to enforce a variety of requirements. Some parameters are activated using check boxes, and some are selected from lists of options.

#### To configure password policy:

1. Click **Configure** on the Administrator Main Menu page.

The Configure webTA page opens

Configu	150 110	LTA	 Logout
Connige	lie we		
	Messages	Login and Banner Messages	
	Policy	Configure Password Policy	
	License	License Management	
	Tasks	Tasks/Email	
	FTP	Build File FTP	
	Audit	Audit Management	
	Session	Session Management	
	Holiday	Holiday Management	
		Return	
KRONO	C"		-

2. Click Policy.

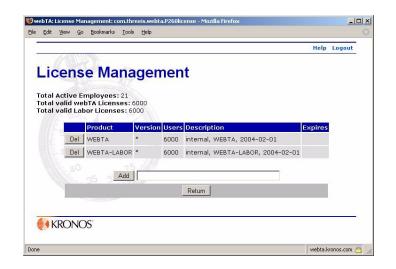
The Password Policy page opens.

Da	ssword Policy		
ra	ssword roncy		
creat	assword policy you define here will be applied when ed or modified. Rules for acceptable passwords are words.		
	Minimum password length	None 💌	
	Must contain an alphabetic character		
	Must contain an uppercase character		
	Must contain a lowercase character		
	Must contain a numeric character		
	Must contain special character		
	Must not be derived from common words		
	Maximum common sequence length	Any 💌	
	Password is valid for	Forever •	
	Can reuse old password after	Always 🔹	
	Can reuse old password after	Always 💌	
		Never -	
	Lockout account after bad logins		
	Save Cancel		
-	(RONOS)		

- 3. Configure your password policy by selecting the appropriate options from the lists and by clicking to select the appropriate options.
- 4. Click Save.

## **Managing licenses**

The License Management page, accessed from the Administrator Main Menu page, shows the licenses that are active in your *webTA* installation, and shows the current number of active users and licenses at the top of the page.



Each license on the License Management page has an accompanying delete button (**Del**). Typically, the only time you will delete a license is if it has expired, and you have received instructions to delete it. Therefore, the procedure for deleting a license is not routine.

#### To add a new license:

1. Click **Configure** on the Administrator Main Menu page.

The Configure webTA page opens.

Configu		LTA	Troip	Logout
Connigu	le we			
	Messages	Login and Banner Messages		
	Policy	Configure Password Policy		
	License	License Management		
	Tasks	Tasks/Email		
	FTP	Build File FTP		
	Audit	Audit Management		
	Session	Session Management		
	Holiday	Holiday Management		
		Return		

2. Click License.

The License Management page opens.

. (	710	Onen			1		
	ens	e Mana	iger	nen	IT		
otal v	alid we	mployees: 21 bTA Licenses: bor Licenses: 6					
		Product	Version	Users	Description	Expires	
	Del	WEBTA	*	6000	internal, WEBTA, 2004-02-01		
	Del	WEBTA-LABOR	*	6000	internal, WEBTA-LABOR, 2004-02-01		
		Add					
					Return		

3. In the text box next to the **Add** button, type the characters in the license string exactly as it was received from Kronos, then click **Add**.

webTA adds the license.

### To delete a license:

1. Click **Configure** on the Administrator Main Menu page.

The Configure webTA page opens.

Config		TA	Help	Logout
Config	ure wei	JIA		
	Messages	Login and Banner Messages		
	Policy	Configure Password Policy		
	License	License Management		
	Tasks	Tasks/Email		
	FTP	Build File FTP		
	Audit	Audit Management		
	Session	Session Management		
	Holiday	Holiday Management		
		Return		
KRONO	S.			

## 2. Click License.

The License Management page opens.

Lic	ens	e Mana	nden	nen	t		
Total A Total v	ctive E alid we	mployees: 21 bTA Licenses: 6 por Licenses: 6	5000				
		Product	Version	Users	Description	Expires	
	Del	WEBTA	*	6000	internal, WEBTA, 2004-02-01		
	Del	WEBTA-LABOR	*	6000	internal, WEBTA-LABOR, 2004-02-01		
		Add					
					Return		

Click **Del** to the left of the license you want to remove.
 *webTA* deletes the license.

## Configuring e-mail task notification

The task function in *webTA* can be configured to send tasks using various delivery methods: by e-mail, to tasks lists, or both. This function also lets you set the expiration date of tasks and include header and footer messages on every message.

## To configure e-mail task notification:

1. Click **Configure** on the Administrator Main Menu page.

The Configure webTA page opens

	6		пер	Logout
Configu	ire we	bTA		
	Messages	Login and Banner Messages		
	Policy	Configure Password Policy		
	License	License Management		
	Tasks	Tasks/Email		
	FTP	Build File FTP		
	Audit	Audit Management		
	Session	Session Management		
	Holiday	Holiday Management		
		Return		
		9.		
<b>KRONOS</b>				

#### 2. Click Tasks.

The Task/E-mail Configuration page opens.

Task/Email C	onfiguration
	omgulation
	Task Delivery
Task Delivery	• webTA only
таяк решуегу	C Email only
	C webTA and Email
	Task Expiration
Task Expiration	<ul> <li>Tasks never expire</li> </ul>
	C Tasks expire in months
Mail server hostname o	r
IP address	
Mail server port	25
Address to use in emai	
From: field	
	(512 chars max)
ano ana manana	
Message body header	
	(512 chars max)
Message body footer	
	Save Cancel Test

3. Select task delivery and e-mail options by clicking to select options and typing in the appropriate text boxes.

IMPORTANT! If you enable the e-mail option in the Task Delivery section of the screen, you must complete all but the optional message fields. The **From:** field must include a valid e-mail address in case mail is returned, and that e-mail account should be checked periodically to ensure that it is current.

Also, employee e-mail addresses must also be entered in the Locator form in the Timekeeper module for e-mails to be received. Locator information may be entered by employees or Timekeepers.

If there is a problem sending the mail message, webTA adds the task to the appropriate task list.

- 4. Click Save.
- 5. If you want to test for the correct e-mail configuration by sending a test message to the e-mail address you provided, click **Test**.

IMPORTANT: The person you send the test message to must have an e-mail address set up in their Locator Info page.

## **Configuring Build File FTP**

The Build File FTP page lets Administrators initialize and configure *webTA* to automatically transfer build files to a remote FTP server. Although this feature can be used to transfer the file to any server reachable from the database server, the most common destination is the FTP server maintained by the National Finance Center (NFC) for the purpose of accepting files from their customers.

## To configure build file FTP:

1. On the Administrator Main Menu click **Configure**.

The Configure webTA page opens.

Config	ure wel	bTA	
	Messages	Login and Banner Messages	
	Policy	Configure Password Policy	
	License	License Management	
	Tasks	Tasks/Email	
	FTP	Build File FTP	
	Audit	Audit Management	
	Session	Session Management	
	Holiday	Holiday Management	
		Return	

## 2. Click FTP.

The Configure Build File FTP page opens.

nfigure Build File		
Use Automatic Build File FTP	Use Automatic Build File FTP C Enabled C Disabled C Enabled C Disabled	
FTP server hostname or IP address		
FTP account userid		
FTP account password		
FTP site command (optional)		
JCL (optional)		

- 3. Select the appropriate setting to enable or disable FTP, and type in the appropriate information in the text boxes.
  - Use Automatic Build File FTP Enables or disables the FTP feature. If disabled, none of the other settings in this page have effect.
  - **FTP server hostname or IP address** The hostname or IP address of the destination FTP server. Examples:

ftp.someplace.gov

192.168.1.17

- **FTP account userid** The user ID that *webTA* will use to log into the remote account. On many FTP servers, this is case sensitive.
- **FTP password** The password used to log into the remote FTP server. On many FTP servers, this is case sensitive. Note that this string is encrypted before *webTA* stores it with the rest of the configuration data, and is decrypted only when needed to connect to the remote FTP server.
- **FTP site command** A site command is a special FTP command which is used to tell remote FTP servers about special processing required for the file. *webTA* users often use a site command when connecting directly to the NFC FTP server. When doing so, the site command filetype=jes instructs the NFC server to submit the file to the job queue rather than saving it to disk. When connecting to a FTP server other than at NFC, this field is usually left blank.
- JCL The NFC transmission specification requires a block of JCL to be included at the top of the transmission file, before any actual T&A data. Text in this field will be prepended to the T&A data before it is transmitted. If transmitting directly to NFC, you should put the JCL required by NFC in this field. Otherwise, leave this field blank.
- 4. Click Save.

## **Managing audits**

The Audit Management function lets you log certain types of auditing information. There are predefined channels that must be turned on to start auditing changes to the system. An example of such a channel is "Audit T&A Validations."

Each such channel can be individually turned on or off by the Administrator. Auditing is turned off by default.

## To manage audits:

1. On the Administrator Main Menu click **Configure**.

The Configure webTA page opens.

-	<b>N</b>		Help	Logout
Configu	are we			
	Messages	Login and Banner Messages		
	Policy	Configure Password Policy		
	License	License Management		
	Tasks	Tasks/Email		
	FTP	Build File FTP		
	Audit	Audit Management		
	Session	Session Management		
	Holiday	Holiday Management		
		Return		
_	S			

#### 2. Click Audit.

The Audit Management page opens.

Audi	t Management		
	Audit T&A Record Certification		
	Audit Password Changes		
	Audit Role Changes		
	Audit T&A Record Changes	•	
	Audit webTA Employee Addition	1	
	Audit Employee Profile Changes	V	
	Audit Leave And Premium Pay Requests		
	Audit Leave Transfer Transactions		
	Audit Set Pay Period		
	Audit System Signer Transactions		
	Audit T&A Record Validation		
	Save Cancel		

- 3. Click to select the appropriate check box for the types of audits you want.
- 4. Click Save.

## **Managing sessions**

The Session Management function lets you set the number of minutes a session can be idle before an employee is automatically logged off, and provides an option that prevents multiple simultaneous logins by the same employee.

## To manage sessions:

1. On the Administrator Main Menu click Configure.

The Configure webTA page opens.

Configu	ure we	bTA	
	Messages	Login and Banner Messages	
	Policy	Configure Password Policy	
	License	License Management	
	Tasks	Tasks/Email	
	FTP	Build File FTP	
	Audit	Audit Management	
	Session	Session Management	
	Holiday	Holiday Management	
		Return	

2. Click Session.

The Session Management page opens.

e	Edit	⊻iew	Go	Ē	ookmarl	s <u>I</u> o	s <u>H</u> elp				H	elp	Logout	
	S	es	si	0	n I	Иa		eme						
	1	_ogii	n Ma	ana	agen	nent	Пр Note.	Saving	ultiple Log	this set	ting causes 1.	all		
		Sess	ion	Tir	neoi	it :	30	ion Timed (m Never Tin	inutes)					
		-				2		Save	Cancel					
	-	KR	ON	0	S								<sup>-</sup> -	

- 3. Select the appropriate options and change the timeout value.
  - If **Prevent Multiple Logins** is selected, webTA stops any attempt to log in more than once in a session using the same user ID and password combination.

NOTE: Saving changes to this check box invalidates all existing sessions. The users of these sessions are alerted that a configuration feature has been modified that requires them to log in again.

- Session Timeout lets you set the length of time (in minutes) a session my be idle before being automatically closed. Changes to this feature take affect immediately upon clicking Save.
- If the Never Timeout option is selected, sessions remain open regardless of any entry in the Session Timeout box.

4. Click Save.

## Managing holidays

The Holiday Management page lists all holidays for current leave year. If the holiday is on a weekend, then the date when the holiday is observed is listed.

When enabled, this feature automatically inserts holidays in the new pay periods at build time.

#### To manage holidays:

1. On the Administrator Main Menu click **Configure**.

The Configure webTA page opens.

Configu	Iro wol	hTA	 
Connige	are wei		
	Messages	Login and Banner Messages	
	Policy	Configure Password Policy	
	License	License Management	
	Tasks	Tasks/Email	
	FTP	Build File FTP	
	Audit	Audit Management	
	Session	Session Management	
	Holiday	Holiday Management	
		Return	

#### 2. Click Holiday.

The Automatic Holiday Entry page opens.

Autom	tic Holi	iday Entry	19 
Automa	atte non	iday Linuy	
		insertion of administrative leav	e for full time
employees on t	the following fec		
	Holiday Date		
	Jan 02 2006	New Year's Day	
	Feb 20 2006	Birthday of Martin Luther King, Jr. Washington's Birthday	
	May 29 2006	Memorial Day	
	Jul 04 2006	Independence Day	
	Sep 04 2006	Labor Day	
	Oct 09 2006	Columbus Day	
	Nov 10 2006	Veterans Day	
	Nov 23 2006	Thanksgiving Day	
	Dec 25 2006	Christmas Day	
	En	able Disable Return	
		able Disable Ketalli	
-	S		77

3. Click Enable or Disable, as required.

# **Maintaining BWI files**

BWI time card data is exported and loaded into *webTA* in a unique way, then validated and built by Timekeepers and Supervisors. This section provides the procedures for maintaining these files.

#### To manually import a BWI file:

1. Click **BWI** on the Administrator Main Menu page.

The BWI Maintenance page opens.

P			lain	to			~~	104010040	
D	VVI	IV	am	ter	Ic	111	ce		
					Imp	ort	Import BWI Files Now		
				Sc	hed	ule	Schedule Import		
					list	ory	View History		
				_	20	1			
							Return		
	1/D		OS'		1	-			

#### 2. Click Import

webTA displays a message informing you of the progress of the import.

#### To schedule an automatic BWI file import:

1. Click **BWI** on the Administrator Main Menu page.

The BWI Maintenance page opens.

-										Help	Logout	8
1	290											1
B	WI	N	la	in	te	en	ar	1	ce			
						Im	port	1	Import BWI Files Now			
						Sche	dule	,	Schedule Import			
						His	tory	,	View History			
						- 3	0_	H				
						1.5			Return			
	KRC	DN	OS	-								

2. Click Schedule.

The BWI Import scheduling page opens.

	11					netp	Logout	-8
В	W	Ir	nport					
			Select up to 3 tim	Day	an import for. Time			
			Schedule Import		No Selection 💌			
			Schedule Import	No Selection 💌	No Selection 💌			
			Schedule Import	No Selection 💌	No Selection 💌			
			Next Import Time:	(No scheduled im	norts)			
			Save	Clear Return	-			
				J				
	KR	JN	05					

- 3. Select as many as three date/time combinations for imports by selecting from the **Day** and **Time** lists.
- 4. Click Save.

The Next Import Time line shows the first import you have scheduled.

#### To view BWI file import history:

1. Click **BWI** on the Administrator Main Menu page.

The BWI Maintenance page opens.



#### 2. Click History.

The BWI History page opens, showing you the import history.

82	: ⊻iew ⊆	o <u>B</u> ookmarks	<u>T</u> ools <u>H</u> elp			н	elp Logout
		liste					
		Histo	r y				
	File	Jame	Import Time	Status	Lines Imported	Lines Total	Log
	BWI-	200619.TXT	Oct 06 2006 (12:10:19)	Success	4221	4221	view
	1	6.276	Return				
			25				

3. If you want to view the log of an import file, in the **Log** column, click **View** for the import whose log you want to see.

The Import Log page for that import opens showing a list of employee records that failed to load.

# **Managing Yard Maintenance files**

Some USCG users enter their time into a time tracking system called Yard. This data is then loaded into *webTA*, then validated and built by Timekeepers and Supervisors. This section provides the procedures for maintaining these files.

#### To manually import Yard files:

1. Click **Yard** on the Administrator Main Menu page.

The Yard Maintenance page opens.

			Help	Logout
Yard Ma	intenar	nce		
	Import	Import Yard Files Now		
	Schedule	Schedule Import		
	History	View History		
	20-			
		Return		
KRONOS	Tank .			

2. Click Import

webTA displays a message informing you that the import has started.

#### To schedule an automatic Yard file import:

1. Click **YARD** on the Administrator Main Menu page.

The Yard Maintenance page opens.

THE		Help Logout
Yard Ma	intenance	
	3	
	Import Import Yard File	es Now
	Schedule Schedule Impor	t I
	History View History	
	20	
	Return	
	30	
KRONOS	Indian Indiana	

#### 2. Click Schedule.

The Yard Import page opens.

Castin	These sectors and the sectors			Help	Logout
Yard I	mport				
Tara	mport				
	Select up to 3 tim	ies to schedule	an import for.		
		Day	Time		
	Schedule Import	This: Fri 💌	Noon 💌		
	Schedule Import	No Selection 💌	No Selection 💌		
	Schedule Import	No Selection 💌	No Selection 💌		
	25.				
	Next Import Time:	Friday, Oct 6, 12	2 PM		
	Save	Clear Retu	rn		

- 3. Select as many as three date/time combinations for imports by selecting from the **Day** and **Time** lists.
- 4. Click Save.

The Next Import Time line shows the first import you have scheduled.

#### To view Yard file import history:

1. Click **Yard** on the Administrator Main Menu page.

The Yard Maintenance page opens.

-			Help	Logout
AUDA				
Yard Main	tenar	nce		
	2 Parallel	The second second second		
	Import	Import Yard Files Now		
	Schedule	Schedule Import		
	History	View History		
		Return		
	- 1- 31M	/		
35 3	SHE			
KRONOS				

2. Click History.

The Yard History page opens.

Yard His	tory				
File Name	Import Time	Status	Lines Imported	Lines Total	Log
200619-08.1	XT Oct 06 2006 (12:10:44	.) Success	178	178	view
200619-04.1	XT Oct 06 2006 (12:10:44	) Success	178	178	view
200619-02.1	XT Oct 06 2006 (12:10:44	) Success	178	178	view
200619-01.1	XT Oct 06 2006 (12:10:44	) Success	178	178	view
10	Return				

3. If you want to view the log of an import file, in the **Log** column, click **View** for the import whose log you want to see.

The Import Log page for that import opens showing a list of employee records that failed to load.

# Modifying a Timekeeper's profile

The Timekeeper Profile page lets you update a Timekeeper's profile. Employees who are assigned to the Timekeeper will have their profile fields default to these values on the profile.

1. On the Administrator Main Menu page, click Tkp Profile.

The Search for Timekeeper page opens.

		Help	Logout
	ah far Timakaanar		
Searc	ch for Timekeeper		
	Employee's Last Name For		
	Employee's First Name		
	Employee's SSN		
	Search Organization None 💌		
	Search Cancel		
1			
KRO!	NOS		

2. Search for and select the Timekeeper.

The Edit Timekeeper Profile page opens for the Timekeeper you selected.

- 3. Make changes to the profile by typing in the text boxes and selecting from the **State** list, if necessary.
- 4. Click Save.

## About webTA reports

The *webTA* reports section contains these pre-defined Administrator reports:

- Agency Status Report
- Employee Assignment by Supervisor Report
- Employee Assignment by Timekeeper Report
- User Role Assignment Report

## **Generating the View Agency Status report**

The Agency Status Report allows the Administrator to view a summary of the time cards and the statuses by pay period, organization, contact information, and Timekeeper.

In the report, a line is generated for each employee in the system, and includes incompletely processed records for pay periods that have ended. If there are no records in the report, all records have been fully processed.

If this report is run near the end of the pay period, the listing is limited to corrected T&A records in the system. This is 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 an Agency Status report:

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

The Administrator Reports Menu page opens.

Adn	nini	istr	ator Reports Menu		
	Sta	atus	View Agency Status Report		
	Emp-	Sup	Employee Assignment By Supervisor Report		
	Emp-	-Tkp	Employee Assignment By Timekeeper Report		
E SY	User R	oles	User Role Assignment Report		
L45		12	20-11		
			Return		
	ONO	S.		_	

#### 2. Click Status.

The Agency Status Report Criteria page opens.

ACT	1175	Help La	ogout
Agen	cv Status R	eport Criteria	
		From To	
	Pay Period Range	2006 - 19 - 2006 - 19 -	
	Timekeeper	Search	
	Timekeeper's Org	None Selected 💌	
	Status	Active	
	Con	tinue Return	

3. Set the pay period range for the report by selecting the beginning and ending dates from the **From** and **To** lists, and select the employee status. You may also type in, or search for and select, the Timekeeper's user ID, then select the Timekeeper's organization, but this is optional.

#### 4. Click Continue.

webTA generates the Agency Status Report, based the parameters you entered.

au Dowlod	Range: 9 - 200	6 TO 10	2006										
	Organization	(Marial)	-	Town	Unit	Tkp Code	Timekeeper	Total Active Emp.		Total T&A On Hold	Total T&A Affirmed	Total T&A Certified	Total T&A Built
2006-14	DHS-HQ	DHS-HQ	DC	0001	01	02	DEMOADMIN		0	0	2	2	2
2006-15	DHS-HQ	DHS-HQ	DC	0001	01	02	DEMOADMIN	1	0	0	1	1	1
2006-17	DHS-HQ	DHS-HQ	DC	0001	01	01	ADMIN	1	1	0	0	0	0
2006-17	-	DHS-HQ	DC	0001	01	01	ADMIN	1	1	0	0	0	0
2006-17	DHS-HQ	DHS-HQ	DC	0001	01	02	DEMOADMIN	2	0	0	2	2	2
2006-17	DHS-HQ	DHS-HQ	DC	0001	01	01	MCELROY	2	2	0	0	0	0
2006-18	SS	DHS-HQ	DC	0001	01	01	ADMIN	1	1	0	0	0	0
2006-18	DHS-HQ	DHS-HQ	DC	0001	01	01	ADMIN	2	2	0	0	0	0
2006-18	SS	SS	DC	0001	01	01	ADMIN	1	1	0	0	0	0
2006-18	DHS-HQ	DHS-HQ	DC	0001	01	02	DEMOADMIN	5	3	0	2	1	1
2006-18	DHS-HQ	DHS-HQ	DC	0001	01	01	MCELROY	1	0	0	1	1	1
2006-18	TSA	TSA	DC	0001	01	01	ORNELASL	4	0	0	4	4	4
2006-19	DHS-HQ	DHS-HQ	DC	0001	01	02	DEMOADMIN	2	1	0	1	1	1
2006-19	TSA	TSA	DC	0001	01	01	ORNELASL	5	4	0	1	0	0

NOTE: A single Timekeeper may appear in the table more than once if that Timekeeper is assigned employees from different contact points or organizations, though this usually will not be the case.)

## Generating the Employee Assignment by Supervisor report

The Employee Assignment by Supervisor Report lists the names of Supervisors and their corresponding employees, and is available to those with HR Administrator or Administrator roles only.

When the report is viewed by an Administrator, it contains all the employees in the system. When the report is viewed by an HR Administrator, results are restricted to the HR Administrator's organization.

The report is generated for every Supervisor/Employee relationship in *webTA*, but can be filtered by Supervisor, organization, and status.

#### To generate an Employee Assignment by Supervisor report:

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

The Administrator Reports Menu page opens.

Ac	Iminist	rator Reports Menu	
	Status	View Agency Status Report	
	Emp-Sup	Employee Assignment By Supervisor Report	
	Emp-Tkp	Employee Assignment By Timekeeper Report	
	User Roles	User Role Assignment Report	
	45	20-11	
		Return	
<b>#</b>	KRONOS		

2. Click Emp-Sup.

The Emp-Sup Assignment Report Criteria page opens.

		Help	Logout
- (	Curry Acation		
Emp	-Sup Assig	nment Report Crite	eria
	Constraint and Constr		
	Supervisor	Search	
	Timekeeper's O	rg None Selected 💌	
	Status	Active	
	5 00		
		Continue Return	
	40 25		
	DNOS		
	INU JO		

- 3. Type in, or search for and select, the Supervisor's user ID, select the Timekeeper's organization (optional), and select the employees' status.
- 4. Click Continue.

The Emp-Sup Assignment Report page opens.

6		Не	lp Logo
mp	o-Sup Assigr	nment Report	
	35/11/10/11	Result Page: 1 2 Ne	xt
	Supervisor	Employee Name	
		Carpenter, Brad	_
		Grant, Caroline	
		Quintarelli, Caroline	
	ADMIN, DEMO	Quintarelli, Caroline	
		Quintarelli, Caroline Test, Caroline	-
		Test, Caroline	-
		Test 3, Caroline	
	ADMIN, DEMO		
		ADMIN, DHSHQ	-
	Administrator, The	ADMIN, SS	
	Hammordeor, The	Administrator, The	
		User, Sup	
	Carpenter, Brad	Employee, New	-
		mcelroy, cheryl	
	mcelroy, cheryl	MOUSE, MICKEY	
		Burl, Mary	
		Dowd, Elaine	
	Ornelas, Leigh	Malone, Yvonne	
		Ornelas, Leigh	
		Timekeeper, LO	
		Result Page: 1 2 Ne	×t
		Return	

## Generating the Employee Assignment by Timekeeper report

The Employee Assignment by Timkeeper Report lists all Timekeeper-Employee associations that exist in *webTA*.

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

The report is generated for current status. The report can be further filtered by specifying a Timekeeper, organization, and status.

#### To generate an Employee Assignment by Timekeeper report:

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

The Administrator Reports Menu page opens.

Adı	minist	rator Reports Menu	
	Status	View Agency Status Report	
	Emp-Sup	Employee Assignment By Supervisor Report	
	Emp-Tkp	Employee Assignment By Timekeeper Report	
	User Roles	User Role Assignment Report	
	5	20-110	
		Return	
	35	30	

#### 2. Click Emp-Tkp.

The Emp-Tpk Assignment Report Criteria page opens.

<u>E</u> dit ⊻iew	<u>Go</u> <u>B</u> ookmarks <u>T</u> ools <u>H</u> elp	webTA: Emp-Tkp Assignment Report Criteria: com.threeis.webta.
		Help Logout
Emp-1	۲kp Assignı	ment Report Criteria
	Timekeeper	Search
	Timekeeper's Org	None Selected 💌
	Status	Active
	Cont	inue Return
	25 30 22	
<b>KRON</b>	OS	

3. Type in, or search for and select, the Timekeeper's user ID, then select the Timekeeper's organization (optional) and the employees' status.

#### 4. Click Continue.

The Emp-Tkp Assignment Report page opens.

	Help Lo
np-Tkp Assigr	nment Report
55/1 10	Result Page: 1 2 Next
Timekeeper	Employee Name
5	Carpenter, Brad
	Grant, Caroline
	Quintarelli, Caroline
ADMIN, DEMO	Quintarelli, Caroline
	Quintarelli, Caroline
	Test, Caroline
	Test, Caroline
	Test 3, Caroline
	ADMIN, DEMO
	ADMIN, DHSHQ
Administrator, The	ADMIN, SS
	Administrator, The
	User, Sup
Carpenter, Brad	Employee, New
mcelroy, cheryl	mcelroy, cheryl
	MOUSE, MICKEY
	Burl, Mary
Ornalas Laigh	Dowd, Elaine
Ornelas, Leigh	Malone, Yvonne Ornelas, Leigh
	Timekeeper, LO
	Result Page: 1 2 Next
2	
	Return

The report lists the names of the employees and their corresponding timekeepers.

## Generating the User Role Assignment report

The User Role Assignment Report gives the Administrator access to a list of active and inactive employees grouped by their roles. The role can be selected from the list at the top of the report. The report changes when the role is changed. For any role that can be delegated, there will be an additional column in the report to show delegates' information.

There are two options: to download T&A profile data or to download employee profile data. Both these data files can be downloaded and opened in Microsoft® Excel.

#### To generate a User Role Assignment report:

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

The Administrator Reports Menu page opens.

Adm	inist	rator Reports Menu
	Status	View Agency Status Report
	Emp-Sup	Employee Assignment By Supervisor Report
	Emp-Tkp	Employee Assignment By Timekeeper Report
	User Roles	User Role Assignment Report
L45		20-11
		Return
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2. Click User Roles.

The User Role Report page opens.

Jse	r Role Report			
	Select user r	ole: Active Employees	Update	
	55 Select user I		Result Page: 1 2 Ne	
	Name	User ID	Agency	~
	ADMIN, DEMO	DEMOADMIN	DHS-HQ	
	ADMIN, DHSHQ	DHSHQADMIN	DHS-HQ	-
	ADMIN, SS	SSADMIN	SS	
	Administrator, The	ADMIN	DHS-HQ	
	Burl, Mary	BURLM1123	TSA	
	Carpenter. Brad	CARPENTERB	DHS-HQ	
	Quintarelli, Caroline	CAQHQ	DHS-HQ	
	Test, Caroline	CAQ4	DHS-HQ	
	Test, Caroline	CAQ6	DHS-HQ	
	Test, Caroline	CAQ5	DHS-HQ	
	Test 3, Caroline	CAQ3	DHS-HQ	
	Timekeeper, LO	TIMEKEEPERLO	TSA	
	User, Sup	SUPUSER	DHS-HQ	
	mcelroy, cheryl	MCELROY	DHS-HQ	
			Result Page: 1 2 Ne	xt
	Download TA	Profile Download EmpProfile R	eturn	

- 3. Select the user role you want the report based on, then click **Update**.
- 4. The report display changes to reflect your choice.

 If you want to view report results as T&A profiles or Employee profiles, click either Download TA Profile or Download Emp Profile, click to select Open with Microsoft Excel, then click OK.

The report you chose opens Microsoft Excel.

6. If you want to download report results in Microsoft Excel .XLS format, click either **Download TA Profile** or **Download Emp Profile**, click to select **Save to Disk**, then click **OK**.

webTA downloads the chosen profile results to your disk in .XLS format.

## Delegating the Administrator role to another employee

You may delegate your *webTA* Administrator role to as many alternates as you want to have access to your role in the event of your absence. The delegates you assign have all rights to administer *webTA* records. (You are not required to create any delegates, but it is recommended that you assign at least one.)

If you have more than one privileged role in *webTA* (such as being both a Supervisor and Administrator), you must separately delegate each role. The Main Menu page from which you access the delegate function determines the role you delegate.

The delegation remains in effect until you remove the user ID of the delegate from your list of delegates.

#### To delegate the Administrator role:

1. On the Administrator Main Menu page, click Delegate.

The Delegate Administrator Role page opens.

Casalin	Help Log	jout
Delega	te Administrator Role	
Delege	the Administrator Noie	
Administrator	delegates for USERID: admin	
	Current Delegates	
	No delegates for this role.	
	Add	
	19-3101	
	Undelegate All Return	
KRONC	DS	

2. Type the user ID of the employee you want to delegate the role to, or search for the employee using *webTA*'s search function. then click **Add**.

The delegated person is added to the Current Delegates table.

#### To undelegate employees:

1. On the Administrator Main Menu page, click **Delegate**.

The Delegate Administrator Role page opens.

	Help Logo
-0	
Dele	gate Administrator Role
Administr	tor delegates for USERID: admin
	Current Delegates
	Del MCELROY - mcelroy, cheryl
	Add
	Undelegate All Return
-	NOS

Employees who have been delegated the Administrator role appear in the Current Delegates section.

2. If you want to undelegate an individual employee, click **Del** next to the person's name in the Current Delegates table.

- OR -

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