# WebTA Enhancements - For Certifying Supervisors

WebTA has been enhanced to provide more options to assist supervisors in the supervisory timekeeping process. Specifically, enhancements include new functionality to sort records and search for employees, an enhanced leave and premium pay approval (or denial) process, and additional report capabilities.

Sorting Records

Supervisors may sort the way webTAs are displayed when viewing or certifying the records. Sorting for the certification process may be done based on T&A status (i.e., validated, on hold, etc.) or employee.

- To sort the display, click on **"Select Employee"** from the **"Supervisor Main Menu"** (see Figure 1).

Figure 1 – Supervisor Main Menu
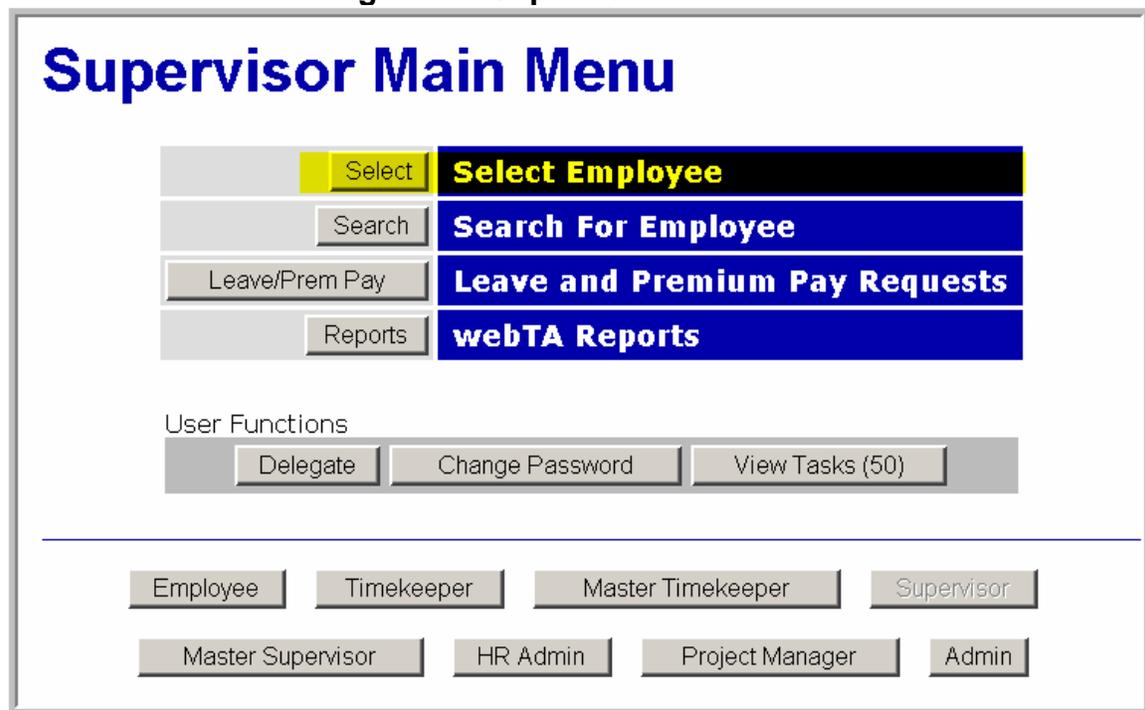
- The **"Select Employee"** Screen will display (see Figure 2). Click on the **"+"** character in the column you want to sort by (see Figure 2). The selected sort will be highlighted by a green carrot **"^"** symbol. Once you have selected a sort type, you make click on the "**^**" symbol and reverse the sort for that particular category. For example, if sorting by **"Employee"** the records will display in the order they were originally entered into the webTA database. Click on the **"^"** symbol and the records will be sorted

alphabetically. Click on the **"v"** symbol to reverse the order. The order selected will remain until you change it.

Figure 2 – Select Employee – Sorting Records

Search Functionality

Supervisors may now search for employees in numerous ways including by supervisor and type of T&A. The search allows you to located employees that are assigned to your or those have been delegated to you by another certifying supervisor. To search for an employee:

• Click on the **"Search"** tab from the **Supervisor Main Menu"** (see Figure 3). The **"Search for Employee"** Screen will display (see Figure 4).

Figure 3 – Supervisor Main Menu

Figure 4 – Search for Employee

To Search by Name

• All searches by names use fuzzy matching. For example, a search for users with the last name of "Jon" will match "Jon", "Johnson, and "Johansen". You may also specify an alphabetical range when searching by last name. For example, "e-g" will display users with last names starting with the characters "e" through "g".

To Search by Social Security Number (SSN)

• You may also search using an employee's SSN but you must use the complete SSN for this type of search. Simply enter the SSN and click on **"Search"**.

To Search by Supervisor

• To search by **"Supervisor"**, click on the drop down arrow and select the appropriate supervisor. The **"Search Results"** Screen will display (see Figure 5). Note that the top of the **"Search Results"** Screen shows the Supervisor's user ID.

• Click on the radio button for the appropriate employee and then click on the tab for the action you want to take (e.g., **"View/Certify"**, **"Locator Info", "Certified T&As"**, or **"Leave Audit"**).

Figure 5 – Search Results

To Search by "T&A Type"

- You can search by **"T&A Type"** by clicking on the drop down arrow and selecting the type of T&A that you want to search for as follows:

    1. Corrections - TAs that are corrections
    2. Unvalidated - T&As that have not been validated by either the employee or timekeepers
    3. Validated - T&As that have been validated by either the employee or the timekeeper but not verified by the supervisor
    4. Certified – T&As that have been both validated and certified
    5. No Profile - employees whose T&As do not have a profile (the timekeeper establishes this)

- The **"Search Results"** Screen will display (see Figure 6). Click on the radio button for the appropriate employee and then click on the tab for the action you want to take (e.g., **"View/Certify", "Locator Info", "Certified T&As",** or **"Leave Audit"**).

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Figure 6 – Search Results by T&A Type

To Search by "Pay Period"

- You can search by **"Pay Period"** by clicking on the drop down arrow and selecting the pay period parameter you want to search for as follows:

  1. All - Displays all T&As
  2. Current - Displays records for the current pay period only
  3. Previous - Displays records for the previous pay period, which are usually completed records
  4. Older - Displays records not in the current or previous pay periods

- The **"Search Results"** Screen will display (see Figure 7). Click on the radio button for the appropriate employee and then click on the tab for the action you want to take (e.g., **"View/Certify", "Locator Info", "Certified T&As",** or **"Leave Audit"**).

Figure 7 – Search Results by Pay Period


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"Certified T&A Summaries"

"Certified T&A Summaries" (see Figure 8) are now available based on a specific range of records or you may show all certified webTAs for an employee. The columns show the pay period, dates of the pay period, and how, when, and by whom it was certified. Note that the corrections are designated a **"C"** next to the pay period number.

•	To restrict the range of records, click on the **"From"** and **"To"** pay periods and select the desired year and pay period. Click the **"Update"** button and the range will be displayed.

•	Click the radio button next to the record you want to view and click **"View Certified Summary"**.

Figure 8 – Certified T&A Summaries

Certified T&A Summaries

Now viewing from Leave Year 2006, Pay Period 1 to Leave Year 2006, Pay Period 5.

From		To	
2006 ▾	1 ▾	2006 ▾	5 ▾

Update

Sheila Fleishell (SHEILA)
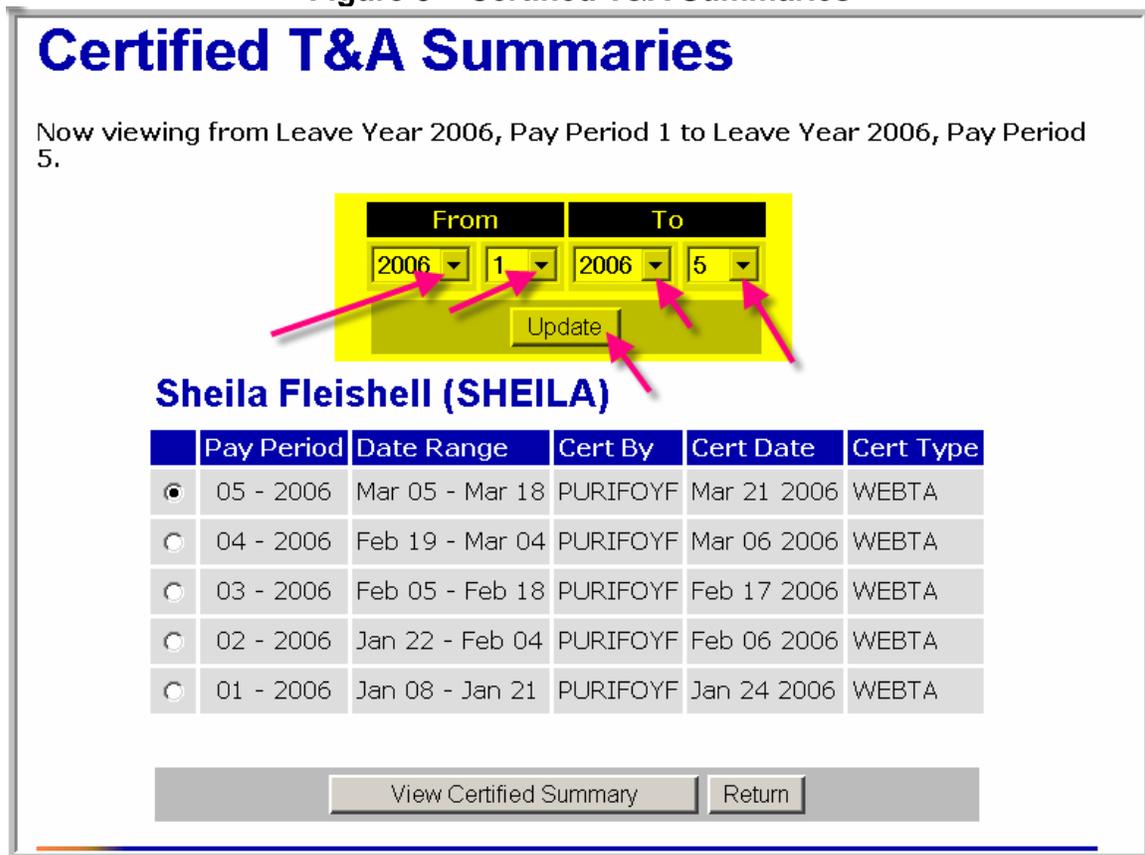
	Pay Period	Date Range	Cert By	Cert Date	Cert Type
⦿	05 - 2006	Mar 05 - Mar 18	PURIFOYF	Mar 21 2006	WEBTA
○	04 - 2006	Feb 19 - Mar 04	PURIFOYF	Mar 06 2006	WEBTA
○	03 - 2006	Feb 05 - Feb 18	PURIFOYF	Feb 17 2006	WEBTA
○	02 - 2006	Jan 22 - Feb 04	PURIFOYF	Feb 06 2006	WEBTA
○	01 - 2006	Jan 08 - Jan 21	PURIFOYF	Jan 24 2006	WEBTA

View Certified Summary   Return

Leave Audit Reports

The **"Leave Audit Report"** is a pay period by pay period account of leave used for any type of leave and by leave year, and is available to supervisors for their employees or employees delegated to them by other certifying supervisors.

The Leave Audit report will display a line for each pay period that the employee has certified records in the system. By default, the Leave Audit contains data for the most recent leave year for which the employee has certified records. If the employee has records in the webTA database for more than one year, you may include the other leave years by modifying the start and end dates. Leave Audits may be run for the following leave types:

- Annual Leave
- Sick Leave
- Credit Hours
- Compensatory Time in Lieu of Overtime
- Compensatory Time off for Travel
- Religious Compensatory Time
- Shore Leave
- Home Leave
- Restored Annual Leave
- Time Off Awards
- Leave Without Pay
- Family Medical Leave Act
- Absence Without Leave
- Suspension
- Furlough
- Military Leave (Emergency)
- Military Leave (Regular)
- Voluntary Leave Transfer Program
- Emergency Leave Transfer Program

To view the "**Leave Audit Report"**

- From the **"Select Employee"** Screen or the **"Search Results"** Screen see Figures 9(a) and 9(b), respectively), click on the radio button for the employee who's **"Leave Audit"** you wish to view.

Figure 9(a) – Select Employee

Figure 9(b) – Search Results

- Click on the **"Leave Audit"** tab and the **"Leave Audit Report"** Screen (see Figure 10) will display. The Leave Audit can be generated to reconcile historical leave records.

Figure 10 – Leave Audit Report

- Select the appropriate **"Start Date"** year and **"End Date"** year for the audit by clicking the drop down arrow then select the appropriate category of the audit and click on **"Update."**

- Right click on the mouse to screen print a copy of the leave audit.
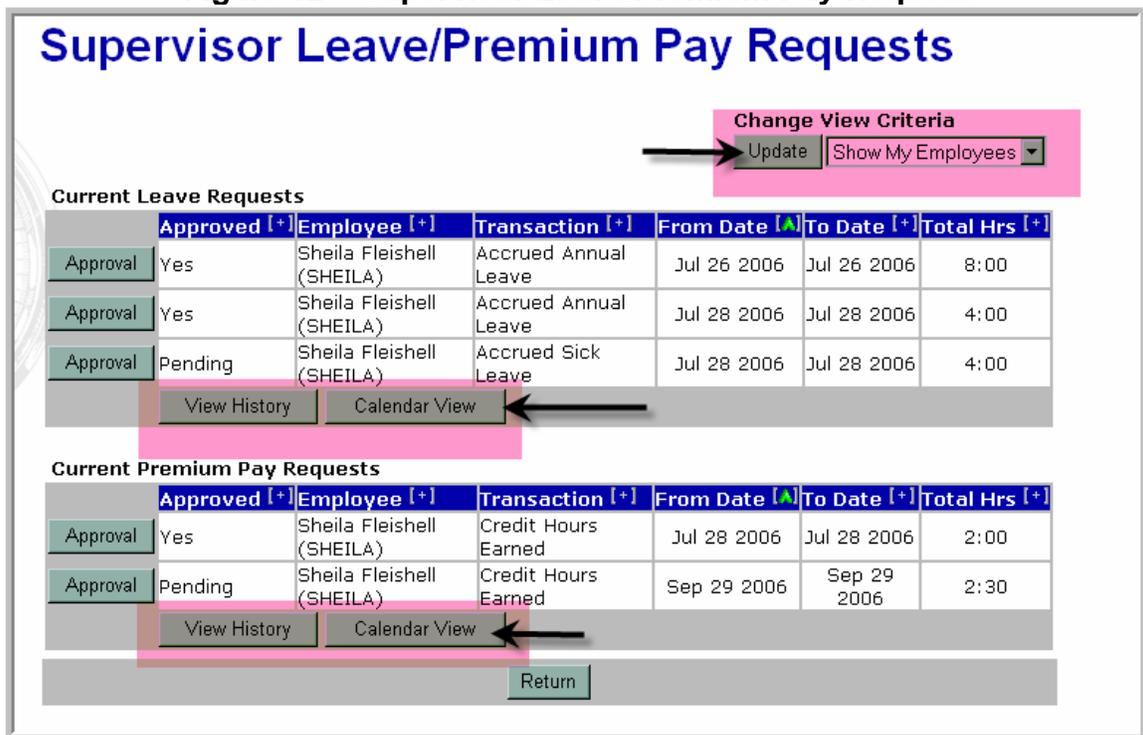

Leave and Premium Pay Requests

The webTA leave/premium pay approval and denial process has been modified to make the process more user friendly and to provide more options for users. When supervisors access the **"Leave/Prem Pay"** functionality from the "**Supervisor Main Menu"** Screen (see Figure 11), the **"Supervisor Leave/ Premium Pay Request"** Screen displays (see Figure 12).

Figure 11 – Supervisor Main Menu

This *"Supervisor Leave/Premium Pay Request"* Screen displays separate sections for **"Current Leave Requests"** and **"Current Premium Pay Requests."** The screen also has new options for supervisors to view historical leave or premium pay requests and view pending or approved leave or premium pay requests in a calendar form. You may also delete an approved or pending leave or premium pay request or revert an approved request back to a pending status.

Figure 12 – Supervisor Leave/Premium Pay Request

Supervisors may sort the way the data is displayed when approving or denying leave and premium pay requests and when selecting employees for certification. Sorting for the leave and premium pay approval/denial process may be done based on approval status, employee user ID, transaction type (i.e., type of leave or premium pay), from date, to date, and total hours. Sorting for the certification process may be done based on T&A status (i.e., validated, on hold, etc.), employee, user ID, pay period, timekeeper, and supervisor.

Sorting Leave and Premium Pay Requests from the Leave Request History

- To sort the view from the **"Leave Request History"** Screen, click on the **"+"** character in the column you want to sort by (see Figure 13). You may sort by the approval status, employee user ID, transaction type, from date, to date, or total hours. The selected sort will be highlighted by a green carrot **"^"** symbol. Once you have selected a sort type, you make click on the **"v"** symbol and reverse the sort for that particular category. For example, if sorting by "**From Date**," the oldest data will be displayed with the **"^"** symbol. Click on the **"v"** symbol, the symbol will reverse, and the **"From Dates"** will display with the most current dates displaying first.

Figure 13 – Leave Request History Sort

Approving or Denying Leave or Premium Pay Requests

- To approve a leave or premium pay request, click on the **"Approval"** tab next to the leave or premium pay request you wish to review.

- The **"Calendar View"** leave request will display (see Figure 14). You may approve or deny the request from this screen.

- Once a leave or premium pay request has been approved or denied, you may revert the request to a pending status for employee modification. Note

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that you may only revert a request from the actual leave or premium pay request or the **"View History"** Screen.

Figure 14 – Leave Request Calendar View

Viewing History of Leave and Premium Pay Requests

*   To view the leave or premium pay request history, click on the **"View History"** tab from the **"Supervisor Leave/Premium Pay Request"** Screen. The **"Leave Request History"** Screen (see Figure 15) will display listing the leave requests or the **"Premium Pay Request History"** Screen (see Figure 16) will display listing premium pay requests for your employees. Note that you may change the view criteria by clicking on the drop down arrow in the **"Change View Criteria"** box at the top of the screen. This

allows you to show (1) **"All"** employees, including your employees and those delegated to you by other supervisors, (2) **"My Employees,"** which shows only your employees, or (3) **"Delegated"** employees which shows only those employees delegated to you by other supervisors.

Figure 15 – Leave Request History

Figure 16- Premium Pay Request History

- To view the request, click on the radio button for the employee and request you wish to view. And click **"View".** The original request will display and you may approve or deny the request.

- If the request has already been approved or denied, you may revert the request to a pending status. Note that you may also delete a request directly from the **"Leave Request History"** Screen by clicking on the radio button for the desired request and then selecting the **"Delete"** tab at the bottom of the screen (see Figure 17).

Figure 17 – Deleting a Leave Request

Calendar View of Leave and Premium Pay Requests

- To view the leave request calendar view, click on the **"Calendar View"** tab from the **"Supervisor Leave/Premium Pay Request"** Screen.

- The **"Leave Request Calendar View"** Screen (see Figure 18) will display listing the leave or premium pay requests for your employees. Note that this screen does not indicate the types of leave or premium pay approved or pending and is an informational screen only.

- You may change the view criteria for this screen by clicking on the drop down arrow in the **"Select View For"** drop down box at the top of the screen. This allows you to select (1) **"Employees,"** which shows only your employees or (2) **"Employees (including delegates)"** which shows your employees and those employees delegated to you by other supervisors. Select the desired option and then click on **"Change View."**

Figure 18 – Leave Request Calendar View

Leave Request Calendar View

Select view for [Employees (including delegates) ▼]

[Change View]

The calendar below shows only approved and pending leave requests, not leave that is actually taken.

<-			October 2006			->
Sun	Mon	Tue	Wed	Thr	Fri	Sat
1	2	3 A: SHEILA - 8:00	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18 A: SHEILA - 8:00	19	20	21
22	23 A: SHEILA - 8:00 P: TEST - 8:00	24 A: SHEILA - 8:00	25 A: SHEILA - 8:00	26 A: SHEILA - 8:00	27 A: SHEILA - 8:00 P: TEST - 6:00	28 A: SHEILA - 8:00
29	30	31				

A: Approved time, **P**: Pending time

[Return]

E-Mail Notification of Requested Leave or Premium Pay

When an employee submits a leave or premium pay request, webTA will send an e-mail to the supervisor notifying you that an employee has submitted a request and indicating the type of leave, the time frames and date of the request, and the total number of hours requested. For example, in Figure 19, the notification indicates an employee has requested Accrued Sick Leave from 8:00 to 12:00 for a total of 12 hours. Note that in order to use e-mail notification in webTA, both the supervisor and employee's e-mails must be entered in the **"Locator Info"** Screen available from the **"Employee Main Menu"**.

Figure 19 – E-Mail Notification

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Identifies the employee making the request and the employee's user ID and the supervisor's
name and user ID

Message from the webTA Administrator
The following webTA notification was sent by EMPLOYEE NAME (Employee
User ID) to SUPERVISOR NAME (Supervisor User ID)

EMPLOYEE (Employee Name) has entered a leave request for [Accrued Sick
Leave] - from 8:00 to 12:00 on 21-JUL-06 - for a total of 4 hour(s).

Access webTA from anywhere:
https://docwebta.ocs.doc.gov/webta/
```
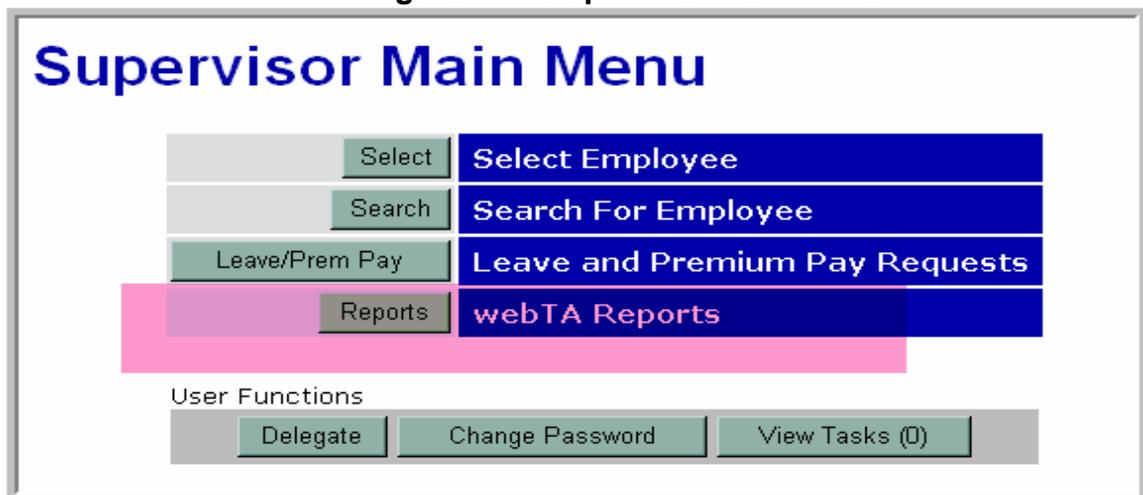
WebTA Reports

A default schedule report is now available for your regularly assigned employees as well as those employees delegated to you by another certifying supervisor. This report lists employees by employee name, user ID, tour of duty (e.g., full time, part-time, etc.), alternate schedule (variable workday, variable workweek, none, etc.), the day-to-day assigned hours for the entire pay period broken down by week 1 and week 2, and the biweekly hours scheduled. If the employee's schedule is split among several transactions (e.g., 4 hours of base pay and 4 hours of base pay with night differential, etc.), the report will show 2 lines for that employee with the number of hours worked on 2 different lines.

• To view the "**Default Schedule Report**" click on the **"Reports"** tab from the **"Supervisor Main Menu"** (see Figure 20).

Figure 20 – Supervisor Main Menu

Supervisor Main Menu

Select	Select Employee
Search	Search For Employee
Leave/Prem Pay	Leave and Premium Pay Requests
Reports	webTA Reports

User Functions
| Delegate | Change Password | View Tasks (0) |

• The **"Supervisor Reports Menu"** Screen (see Figure 21) will display.

Figure 21 – Supervisor Reports Menu
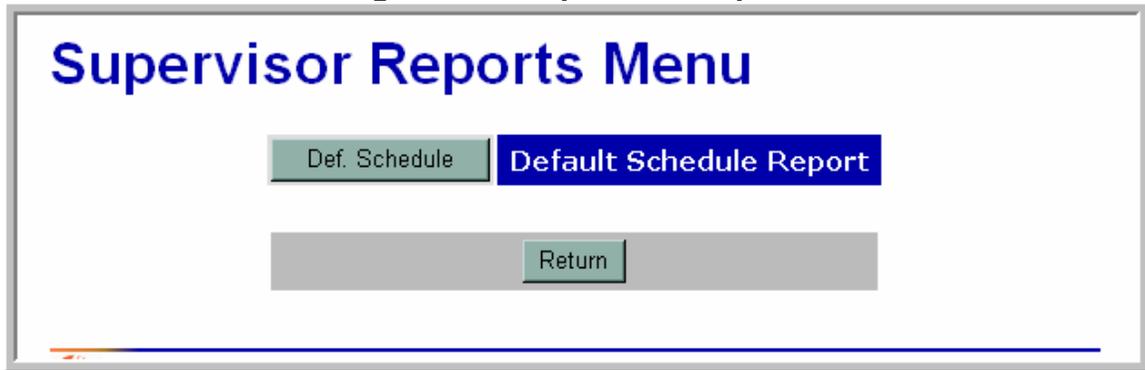
• Click on the **"Def. Schedule"** tab and the **"Default Schedule Report"** Screen (see Figure 22) will display.

Figure 22 - Default Schedule Report

Employee	ID	Tour	Alt. Schedule	Week 1 Hours								Week 2 Hours						Total
				S	M	T	W	T	F	S	S	M	T	W	T	F	S	
Fleishell, Sheila	SHEILA	Full Time	4 Ten-hour Days			10:00	10:00	10:00	10:00				10:00	10:00	10:00	10:00			80:00
case, test	TESTER	Full Time	5/4/9 Schedule		9:00	9:00	9:00	9:00	8:00				9:00	9:00	9:00	9:00			80:00