

Slide 1 - Learning Objectives



The slide features a dark blue background with a gradient. In the top left corner is the WEBTA logo, consisting of a cluster of orange dots followed by the text 'WEBTA™'. To the right of the logo, the title 'webTA for Timekeepers' is written in a large, bold, orange font. Below this, the subtitle 'Manage Accounts' is centered in a white font. Underneath the subtitle, the text 'Learning Objectives' is underlined in white. The main content of the slide is the text 'In this lesson, you will learn how to:' followed by a bulleted list with one item: '• Add accounts to your My Timekeeper Accounts list'. In the bottom right corner, there is a white button with a blue border and the text 'Next »'. In the bottom left corner, the text 'Reposition CC' is visible in a small font.

Slide notes

Welcome to the webTA for Timekeepers training course. In this lesson, you will learn how to Add Accounts to your My Timekeeper Accounts list. Select next to continue.

Slide 4 - Slide 4

The screenshot shows the WEBTA™ interface for a Timekeeper. At the top, there is a navigation bar with the WEBTA logo, tabs for 'Employee' and 'Timekeeper', and links for 'Inbox [1]', 'Settings', 'Help', and 'Log Out'. Below the navigation bar is the 'Timekeeper Main Menu' section, which is organized into several categories:

- Employees**: Select Employees, Employee Leave Requests, Employee Premium Pay Requests
- Reports**: Reports, My Saved and Scheduled Reports, Adhoc Report Management
- Continuation of Pay (COP)**: COP Events
- Accounting**: Accounts
- Schedule**: Employee Schedules List View, Employee Schedules Grid View, Schedule Templates, Shifts
- Delegates/Reassignment**: My Delegates, Manage Supervisor Delegates, Timekeeper Profile, Takeover Employee, Reassign Employees to Timekeeper, Reassign Employees to Supervisor

At the bottom right of the menu area, there is a blue button labeled 'Next >>'.

Slide notes

Timekeepers are responsible for maintaining a set of accounts to which their employees can charge time. To view this list, we will select the Accounts link from the Timekeeper Main Menu. Select next to continue.

Slide 5 - Slide 5

The screenshot shows the WEBTA Timekeeper Main Menu. At the top left is the WEBTA logo with 'Employee' and 'Timekeeper' tabs. At the top right are links for 'Inbox [1]', 'Settings', 'Help', and 'Log Out'. The main menu is titled 'Timekeeper Main Menu' and is organized into several sections:

- Employees**
 - Select Employees
 - Employee Leave Requests
 - Employee Premium Pay Requests
- Reports**
 - Reports
 - My Saved and Scheduled Reports
 - Adhoc Report Management
- Continuation of Pay (COP)**
 - COP Events
- Accounting** (highlighted with a red border)
 - Accounts
- Schedule**
 - Employee Schedules List View
 - Employee Schedules Grid View
 - Schedule Templates
 - Shifts
- Delegates/Reassignment**
 - My Delegates
 - Manage Supervisor Delegates
 - Timekeeper Profile
 - Takeover Employee
 - Reassign Employees to Timekeeper
 - Reassign Employees to Supervisor

Slide notes

Slide 6 - Slide 6

The screenshot shows the WEBTA web interface for a Timekeeper. At the top, there is a navigation bar with 'WEBTA™ Employee Timekeeper' and 'Inbox [3] | Settings | Help | Log Out'. Below this is a breadcrumb trail 'Timekeeper Main Menu >'. The main heading is 'My Timekeeper Accounts - HARRIS, DANIEL'. There is a 'Delegate:' dropdown set to 'Self' and a 'Switch' button. A search bar is present with 'Account:' and 'Description:' fields, and 'Search' and 'Clear' buttons. Below the search bar is a table of accounts:

Account	Description	Save Description	Remove
100000001	Sample Account #1	Save	X
100000002	Sample Account #2	Save	X
SE_NRCS12345678D	Test Description	Save	X

Below the table, it says '1-3 of 3 Records' and 'View 25 50 100'. There is a 'Get Account(s)' button. Below that is a 'Create New Account' section with fields for '* Account Structure:' (set to NRCS), '* Shorthand Code:', and 'Description:'. There are 'Create' and 'Cancel' buttons, and a 'Next >>' button.

Slide notes

Here, we can see a sample set of accounts for this Timekeeper. Timekeepers can assign these accounts to employees with Stored or Local account selected in their Timesheet Profile. Employees with Manual Account Entry selected can chose from this list as well.

To add accounts to the list, we will select the Get Accounts button. Select next to continue.

Slide 7 - Slide 7

WEBTA™ Employee Timekeeper

Inbox [3] | Settings | Help | Log Out

Timekeeper Main Menu >

My Timekeeper Accounts - HARRIS, DANIEL

Delegate: Self Switch

My Accounts

Items marked with an asterisk* are required.

Account: Description: Search Clear

Account	Description	Save Description	Remove
100000001	Sample Account #1	Save	X
100000002	Sample Account #2	Save	X
SE_NRCS12345678D	Test Description	Save	X

1-3 of 3 Records View 25 50 100

Get Account(s)

Create New Account

* Account Structure: NRCS

* Shorthand Code:

Description:

Create

Cancel

Slide notes

Slide 8 - Slide 8

WEBTA™ Employee Timekeeper

Inbox [3] | Settings | Help | Log Out

Timekeeper Main Menu > My Timekeeper Accounts >

Select Accounts

Account: Shorthand Code: Budget Period: Fund: Cost Center:

WBS: Functional Area: Treasury Symbol: Accounting Station: Description:

Account	Description	
SE_NRCS12345678D	Test DescriptionD	<input checked="" type="checkbox"/>

1-1 of 1 Records View

Slide notes

Note that the accounts on our list are listed as Selected. To add accounts to the list, click the Select button next to the desired account. In this example, there are no accounts to select, so we will return to the My Timekeeper Accounts page. Select next to continue.

Slide 9 - Slide 9

WEBTA™ Employee Timekeeper

Inbox [3] | Settings | Help | Log Out

Timekeeper Main Menu > [My Timekeeper Accounts >](#)

Select Accounts

Account: Shorthand Code: **Select** Budget Period: Fund: Cost Center:

WBS: Functional Area: Treasury Symbol: Accounting Station: Description: **Search** **Clear**

Account	Description	
SE_NRCS12345678D	Test DescriptionD	Selected

1-1 of 1 Records View

Save **Cancel**

Slide notes

Slide 10 - Slide 10

The screenshot shows the WEBTA web interface for a Timekeeper user. The header includes the WEBTA logo, 'Employee Timekeeper' tabs, and navigation links for 'Inbox [3]', 'Settings', 'Help', and 'Log Out'. Below the header, there is a 'Timekeeper Main Menu >' link and a title 'My Timekeeper Accounts - HARRIS, DANIEL'. A 'Delegate:' section shows a dropdown menu set to 'Self' and a 'Switch' button. The 'My Accounts' section includes a search form with 'Account:' and 'Description:' fields, and 'Search' and 'Clear' buttons. Below the search form is a table of accounts:

Account	Description	Save Description	Remove
100000001	Sample Account #1	Save	X
100000002	Sample Account #2	Save	X
SE_NRCS12345678D	Test Description	Save	X

Below the table, there are pagination controls showing '1-3 of 3 Records' and 'View' options for 25, 50, and 100 records. A 'Get Account(s)' button is located below the table. The 'Create New Account' section has a dropdown for '* Account Structure:' set to 'NRCS', and input fields for '* Shorthand Code:' and 'Description:'. 'Create' and 'Cancel' buttons are at the bottom left, and a 'Next >>' button is at the bottom right.

Slide notes

New Accounts can be created by selecting the Account Structure, and by entering the Shorthand code and description into the appropriate fields. In this example, we will return to the Main Menu. Select next to continue.

Slide 11 - Slide 11

The screenshot displays the WEBTA interface for a Timekeeper user. At the top, the user is identified as 'Employee Timekeeper' with navigation links for 'Inbox [3]', 'Settings', 'Help', and 'Log Out'. The main heading is 'My Timekeeper Accounts - HARRIS, DANIEL'. Below this, there is a 'Delegate' section with a dropdown set to 'Self' and a 'Switch' button. The 'My Accounts' section includes a search form with 'Account' and 'Description' fields, and 'Search' and 'Clear' buttons. A table lists three accounts with columns for 'Account', 'Description', 'Save Description', and 'Remove'. The table data is as follows:

Account	Description	Save Description	Remove
100000001	Sample Account #1	Save	X
100000002	Sample Account #2	Save	X
SE_NRCS12345678D	Test Description	Save	X

Below the table, there are pagination controls showing '1-3 of 3 Records' and 'View' options for 25, 50, and 100 records. A 'Get Account(s)' button is present. The 'Create New Account' section includes a dropdown for 'Account Structure' (set to NRCS), input fields for 'Shorthand Code' and 'Description', and 'Create' and 'Cancel' buttons.

Slide notes

Slide 12 - Slide 12

The screenshot displays the WEBTA Timekeeper Main Menu. At the top left is the WEBTA logo, followed by 'Employee' and 'Timekeeper' tabs. On the top right, there are links for 'Inbox [3]', 'Settings', 'Help', and 'Log Out'. The main menu is titled 'Timekeeper Main Menu' and is organized into several categories:

- Employees**
 - Select Employees
 - Employee Leave Requests
 - Employee Premium Pay Requests
- Reports**
 - Reports
 - My Saved and Scheduled Reports
 - Adhoc Report Management
- Continuation of Pay (COP)**
 - COP Events
- Accounting**
 - Accounts
- Schedule**
 - Employee Schedules List View
 - Employee Schedules Grid View
 - Schedule Templates
 - Shifts
- Delegates/Reassignment**
 - My Delegates
 - Manage Supervisor Delegates
 - Timekeeper Profile
 - Takeover Employee
 - Reassign Employees to Timekeeper
 - Reassign Employees to Supervisor

Slide notes

Slide 13 - Finish



Slide notes

You have completed this lesson. To continue, select the Finish button.