



DRO WATRS Training (GridBuddy)

December 2020



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Agenda

- Purpose of Today's Training
- Introduction to WATRS
 - GridBuddy
- WATRS Functions
 - Creating Time Tracker Entries
 - Other WATRS Functionalities
- Troubleshooting and Resources



Purpose of WATRS Training

- Introduce users to Workforce and Time Reporting System (WATRS)
- Familiarize users with entering time tracker entries for excluded time, premium time, and flex time as well as other functions to enhance the user experience



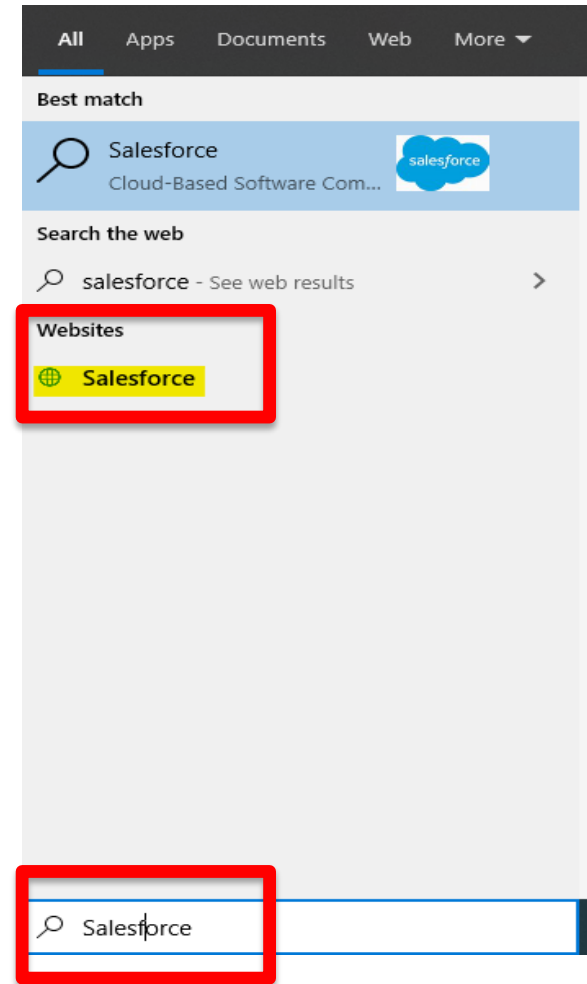
Introduction to WATRS

- Workforce and Time Reporting System (WATRS) is the replacement tool for ASPEN.
- It is the system for employees to enter excluded time, premium time, and flex time.
- Currently, WATRS utilizes GridBuddy, an application that provides the grid-view when entering time tracker entries.
 - After January 2021, WATRS will transition to a new grid-view.



Accessing WATRS

- How to log into WATRS:
 - Clicking on this link:
<https://va.my.salesforce.com>
 - OR**
 - Type “Salesforce” into the Search box of the Desktop and then click on “Salesforce”.



WATRS Home Page

1. Global Search
2. Quick Action Toolbar
3. Navigation Bar
4. Employee Performance Report (EPR)

The screenshot shows the WATRS Home Page in Salesforce. The interface is annotated with four numbered callouts:

- 1**: Points to the Global Search bar at the top left.
- 2**: Points to the Quick Action Toolbar at the top right, containing icons for star, grid, help, settings, and notifications.
- 3**: Points to the Navigation Bar below the search bar, which includes links for WATRS, WATRS Home, Contacts, Performances, Time Tracker, Reports, and Dashboards.
- 4**: Points to the Employee Performance Report (EPR) content area, which includes a title bar, filters for Station, Employee, and User Login, and a main report section with various data tables and charts.



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Time Tracker Overview

1. Time Tracker Tab
2. Create Time Tracker Tab
3. Time Tracker Functions
4. My Filter
5. Information icon
6. Records (Column Information)
7. Records Function
8. Contact Record Shortcut
9. Page Layout

The screenshot shows the WATRS Time Tracker interface. At the top, there are navigation tabs: WATRS, WATRS Home, Performance, Reports, and Time Tracker. The 'Time Tracker' tab is active. Below the tabs, there is a 'Create Time Tracker' section with a '2' callout. A table of time tracker records is displayed below, with columns for Employee Name, Type of Time, Start Date and Time, End Date and Time, Lunch Taken, Employee Comments, Reason, Slip Reason, Time, Record Time, Status, and Detail Reason. The table contains five rows of data for 'Jackie Jones'. A '3' callout points to the table's header area, which includes 'NEW', 'SAVE', 'REFRESH', 'FILTER', and 'MORE' buttons. A '4' callout points to the 'My Filter' dropdown menu. A '5' callout points to an information icon in the top right corner. A '6' callout points to the 'RECORDS' column header. A '7' callout points to the 'EMPLOYEE NAME' column header. A '8' callout points to the 'TYPE OF TIME' column header. A '9' callout points to the pagination controls at the bottom of the table, which show '1-20 of 24 Time Tracker Object' and 'Page 1 of 2'. The table rows show various time tracker types such as 'Excluded Time', 'Premium Time', and 'Comp Time Taken' with their respective dates, times, and statuses (Pending, Cancelled, Approved).

7	8			6									
EMPLOYEE NAME	TYPE OF TIME	START DATE AND TIME	END DATE AND TIME	LEAVE TAKEN?	EMPLOYEE COMMENTS	REASON	SLIP REASON	TIME	RECORD TIME	STATUS	DETAIL REASON		
Jackie Jones	Excluded Time	06/27/2018 6:00 AM	06/27/2018 2:30 PM	No		Leave (AL, SL, Etc)	Annual Leave		8 hr 30 min	Pending			
Jackie Jones	Excluded Time	06/28/2018 9:00 AM	06/28/2018 10:15 AM	No		Camp Time Taken	Comp Time Used		1 hr 15 min	Cancelled			
Jackie Jones	Premium Time	06/14/2018 6:00 PM	06/14/2018 8:30 PM	No		Overtime	Weekday Overtime		2 hr 30 min	Approved			
Jackie Jones	Premium Time	06/06/2018 6:00 PM	06/06/2018 6:30 PM	No		Overtime	Weekday Overtime		0 hr 30 min	Approved			
Jackie Jones	Premium Time	06/29/2018 4:00 PM	06/29/2018 6:30 PM	No		Overtime	Weekday Overtime		2 hr 30 min	Approved			
Jackie Jones	Excluded Time	06/29/2018 4:00 PM	06/29/2018 6:30 PM	No		Comp Time Taken	Comp Time Used		2 hr 30 min	Approved			



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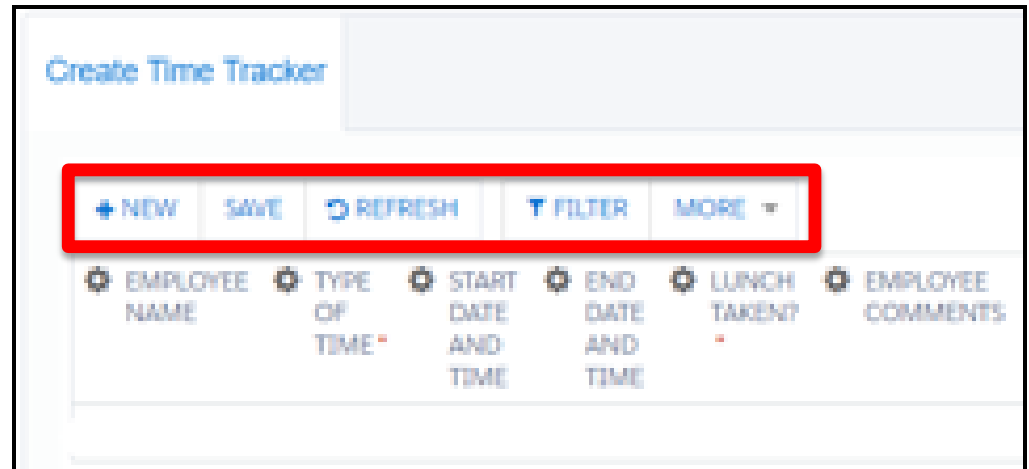
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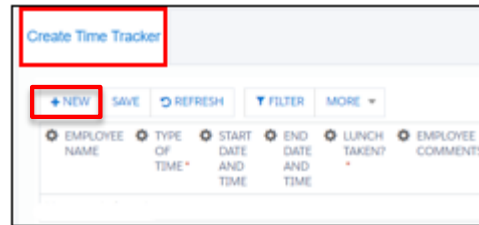
Time Tracker Functions

- New – used to create a new time tracker entry
- Save – used to save the time tracker entry after it is created
- Refresh – used to provide the most updated version of the viewing page
- Filter – provides a view of specific records
- More
 - Mass Create
 - Export
 - Reorder/Hide Columns

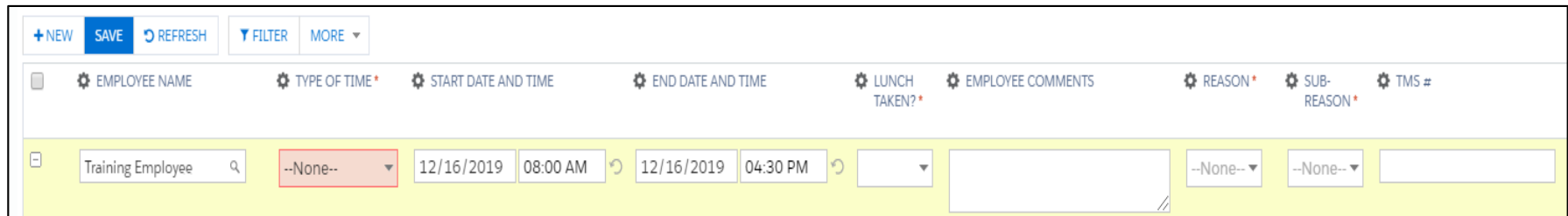


Creating a Time Tracker Entry

- To create a new time tracker entry, click on “New”.

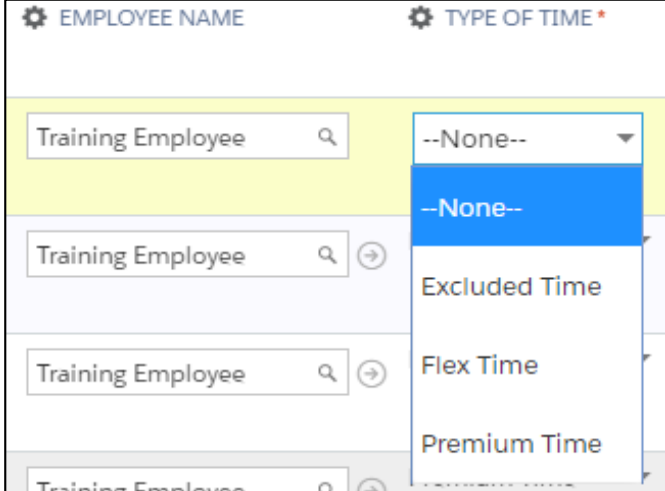


- A new time entry record will appear with some pre-populated fields.

A screenshot of the time tracker entry form. The form has a header with buttons: "+ NEW", "SAVE", "REFRESH", "FILTER", and "MORE". Below the header, there is a table with columns: "EMPLOYEE NAME", "TYPE OF TIME*", "START DATE AND TIME", "END DATE AND TIME", "LUNCH TAKEN?", "EMPLOYEE COMMENTS", "REASON*", "SUB-REASON*", and "TMS #". The first row of the table is highlighted in yellow and contains the following data: "Training Employee" (with a search icon), "--None--" (with a dropdown arrow), "12/16/2019 08:00 AM" (with a refresh icon), "12/16/2019 04:30 PM" (with a refresh icon), a dropdown menu, an empty text box, "--None--" (with a dropdown arrow), "--None--" (with a dropdown arrow), and an empty text box.

Creating a Time Tracker Entry (continued)

- Select the “Type of Time”
 - **Excluded time** is any time spent away from production hours, such as training, leave, etc.
 - **Flex time** is entered when deviating from a normal workday and must equal the same hours as user’s normal tour of duty
 - **Premium time** is entered when any time is worked in addition to a normal tour of duty, such as overtime.



The screenshot shows a software interface for creating a time tracker entry. It features a table with two columns: 'EMPLOYEE NAME' and 'TYPE OF TIME'. The first row is highlighted in yellow and has a search box containing 'Training Employee' and a dropdown menu set to '--None--'. The dropdown menu is open, showing the following options: '--None--', 'Excluded Time', 'Flex Time', and 'Premium Time'. The second and third rows also have search boxes with 'Training Employee' and a plus icon to their right. The fourth row is partially visible at the bottom.



Scenario 1: Excluded Time Entry

- Select **Excluded Time**
- Enter the **Start Date and Time** and the **End Date and Time** for the entry
- Check **Lunch Taken** – indicate whether lunch was taken for this entry
- Add **Employee Comments**, if applicable for the supervisor's knowledge.

Please avoid entering any PII as this is not an encrypted field.

The screenshot shows a web-based time entry interface. At the top, there are buttons for '+ NEW', 'SAVE', and 'REFRESH', along with 'FILTER' and 'MORE' options. A filter is set to '(Admin) 1. Created (Last 7 Days)'. The main table has columns for 'EMPLOYEE NAME', 'TYPE OF TIME', 'START DATE AND TIME', 'END DATE AND TIME', 'LUNCH TAKEN?', 'EMPLOYEE COMMENTS', 'REASON', 'SUB-REASON', and 'TMS #'. A row for 'Courtney Crow' is highlighted in yellow. The 'TYPE OF TIME' dropdown menu is open, showing options: '--None--', 'Excluded Time' (highlighted in blue), 'Flex Time', and 'Premium Time'. The 'START DATE AND TIME' is 12/14/2020 08:00 AM and the 'END DATE AND TIME' is 12/14/2020 04:00 PM. The 'LUNCH TAKEN?' field is empty. The 'REASON' and 'SUB-REASON' dropdowns are also set to '--None--'.

Scenario 1: Excluded Time Entry (continued)

The screenshot shows a web-based time entry application. At the top, there are navigation buttons: '+ NEW', 'SAVE', 'REFRESH', 'FILTER', and 'MORE'. A filter is set to '(Admin) 1. Created (Last 7 Days)'. Below this is a header row with gear icons and labels for various fields: EMPLOYEE NAME, TYPE OF TIME, START DATE AND TIME, END DATE AND TIME, LUNCH TAKEN?, EMPLOYEE COMMENTS, REASON, SUB-REASON, and TMS #. The main form area is highlighted in yellow. The 'EMPLOYEE NAME' field contains 'Courtney Crow'. The 'TYPE OF TIME' dropdown is open, showing a list of options: '--None--', '--None--', 'Excluded Time' (which is highlighted in blue), 'Flex Time', and 'Premium Time'. The 'START DATE AND TIME' field shows '12/14/2020 08:00 AM' and the 'END DATE AND TIME' field shows '12/14/2020 04:00 PM'. Other fields like 'LUNCH TAKEN?', 'EMPLOYEE COMMENTS', 'REASON', 'SUB-REASON', and 'TMS #' are currently empty.

- Select **Reason**

Based on the category selected, a set of Sub-Reasons will populate.

- Select **Sub-Reason**

Select the appropriate sub-reason for the entry.

This screenshot shows a close-up of the 'REASON' dropdown menu. The menu is open, displaying a list of options. The first two options are '--None--', with the second one highlighted in blue. Other options include 'Comp Time Taken', 'Credit Hours Taken', 'Leave (AL, SL, Etc)', 'Meetings & Performance Management', 'Other', 'Quality & Training', 'Special Projects', and 'Union Time'.

This screenshot shows a close-up of the 'SUB-REASON' dropdown menu. The menu is open, displaying a list of options. The first two options are '--None--', with the second one highlighted in blue. Other options include 'Technology', 'PIV Activities', 'Surveys', 'Employee Moves', 'Emergency Preparedness', 'Telework - Emergency Travel to/from Office', and 'Other - All other sub types'.

Scenario 1: Excluded Time Entry (continued)

The screenshot shows a web-based time entry application. At the top, there are navigation buttons: '+ NEW', 'SAVE' (highlighted in blue), and 'REFRESH'. To the right is a filter dropdown set to '(Admin) 1. Created (Last 7 D...' and icons for help and favorites. Below this is a header row with gear icons and labels for various fields: 'EMPLOYEE NAME', 'TYPE OF TIME', 'START DATE AND TIME', 'END DATE AND TIME', 'LUNCH TAKEN?', 'EMPLOYEE COMMENTS', 'REASON', 'SUB-REASON', and 'TMS #'. The main form area has a yellow background. The 'EMPLOYEE NAME' field contains 'Courtney Crow'. The 'TYPE OF TIME' dropdown menu is open, showing options: '--None--', 'Excluded Time' (highlighted in blue), 'Flex Time', and 'Premium Time'. The 'START DATE AND TIME' field shows '12/14/2020 08:00 AM' and the 'END DATE AND TIME' field shows '12/14/2020 04:00 PM'. Other fields like 'LUNCH TAKEN?', 'EMPLOYEE COMMENTS', 'REASON', 'SUB-REASON', and 'TMS #' are currently empty.

- Note: If an excluded time entry is for TMS training, then the **TMS #** field will need to be filled.
- Once the entry is completed, then click on **Save**.
 - If any changes were made to a record that is not saved, the **Save** button will be blue/active.
 - If an entry is incorrectly filled or missing information, user will receive an error message.
 - Once saved, the status will be in *Pending* status until the supervisor cancels or approves the entry.

Scenario 2: Flex Time Entry

- Select ***Flex Time***
- Enter the appropriate ***Start Date and Time*** and ***End Date and Time*** for the flex time
- Add ***Employee Comments***, if applicable for the supervisor's knowledge.

Please avoid entering any PII as this is not an encrypted field.

- Click ***Save***.
- Once the entry is completed, then click on ***Save***.
 - Once saved, the status will be in *Pending* status until the supervisor cancels or approves the entry.

The screenshot shows a web application interface for entering flex time. At the top, there are buttons for '+ NEW', 'SAVE', and 'REFRESH', along with 'FILTER' and 'MORE' dropdowns. A filter is set to '(Admin) 1. Created (Last 7 Days)'. The main table has columns for 'EMPLOYEE NAME', 'TYPE OF TIME', 'START DATE AND TIME', 'END DATE AND TIME', 'LUNCH TAKEN?', 'EMPLOYEE COMMENTS', 'REASON', 'SUB-REASON', and 'TMS #'. A row for 'Courtney Crow' is highlighted in yellow. The 'TYPE OF TIME' dropdown menu is open, showing options: '--None--', 'Excluded Time', 'Flex Time', and 'Premium Time'. The 'START DATE AND TIME' is 12/14/2020 08:00 AM and the 'END DATE AND TIME' is 12/14/2020 04:00 PM.



Scenario 3: Premium Time Entry

- Select **Premium Time**
- Enter the appropriate **Start Date and Time** and **End Date and Time** for the premium time
- Add **Employee Comments**, if applicable for the supervisor's knowledge.

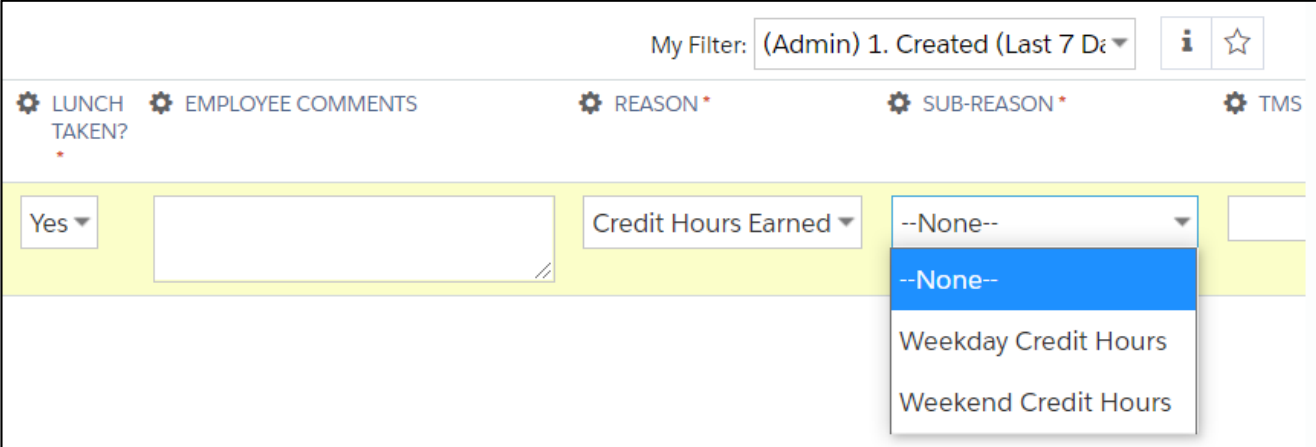
Please avoid entering any PII as this is not an encrypted field.

The screenshot displays a web application interface for time entry. At the top, there are navigation buttons: '+ NEW', 'SAVE', 'REFRESH', 'FILTER', and 'MORE'. A filter dropdown shows 'My Filter: (Admin) 1. Created (Last 7 Days)'. Below this is a table with columns: 'EMPLOYEE NAME', 'TYPE OF TIME', 'START DATE AND TIME', 'END DATE AND TIME', 'LUNCH TAKEN?', 'EMPLOYEE COMMENTS', 'REASON', 'SUB-REASON', and 'TMS #'. The first row is highlighted in yellow and contains the following data: 'Courtney Crow', '--None--', '12/14/2020 08:00 AM', '12/14/2020 04:00 PM', an empty dropdown, an empty text field, '--None--', '--None--', and an empty text field. A dropdown menu is open for the 'TYPE OF TIME' column, showing options: '--None--', 'Excluded Time', 'Flex Time', and 'Premium Time'. The 'Premium Time' option is highlighted with a red border.



Scenario 3: Premium Time Entry (continued)

- Select **Reason**
 - Based on the type of time selected, a set of Sub-Reasons will populate
- Select **Sub-Reason**
 - Select the appropriate sub-reason for the entry.

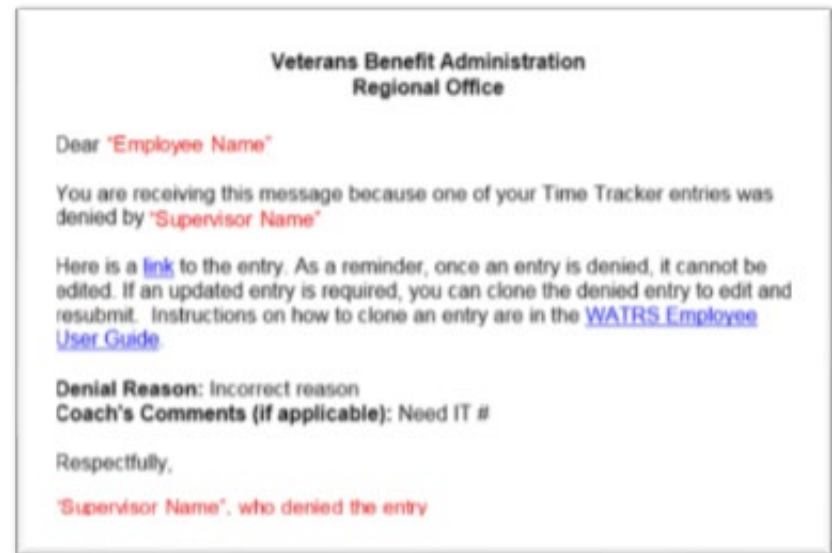


The screenshot shows a web interface for time entry. At the top, there is a filter section with the text "My Filter: (Admin) 1. Created (Last 7 Days)" and icons for information and favorites. Below this is a navigation bar with several menu items: "LUNCH TAKEN?", "EMPLOYEE COMMENTS", "REASON", "SUB-REASON", and "TMS". The main form area is highlighted in yellow and contains several input fields. On the left, there is a "Yes" dropdown menu. Next to it is a text input field. To the right of the text field is a "Credit Hours Earned" dropdown menu. Further right is a "Sub-Reason" dropdown menu that is currently open, showing options: "--None--", "Weekday Credit Hours", and "Weekend Credit Hours".

- Click **Save**.
- Once the entry is completed, then click on **Save**.
 - Once saved, the status will be in *Pending* status until the supervisor cancels or approves the entry.

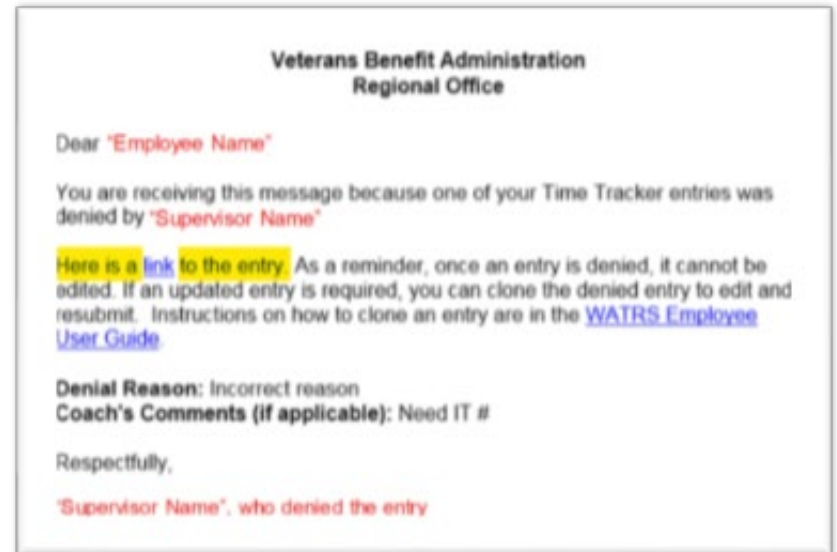
When a Time Tracker Entry is Denied

- If a time tracker entry is denied, an email notification will be sent informing the user of the denial reason as to why it was denied and any supervisor's comments, if provided.
- If the reason or comments indicate the time tracker entry needs to be corrected, take the following steps:



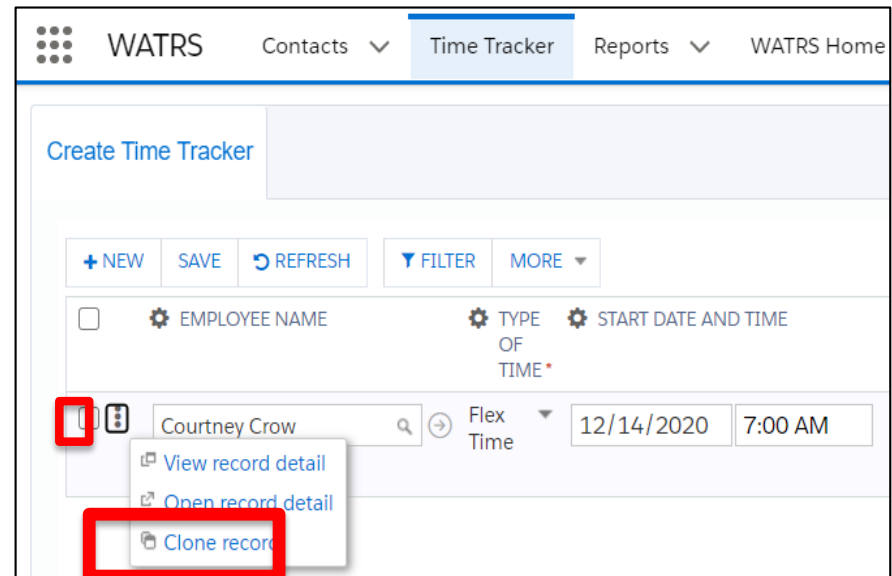
When a Time Tracker Entry is Denied (continued)

- Click on the link in the email to go to the time tracker entry.
- Review the denied entry and note the changes needed.
- Navigate back to Time Tracker by clicking on the **Time Tracker** tab on the Navigation Bar.
 - The record cannot be edited but a new entry can be created or the denied entry cloned for resubmission.



Cloning a Time Tracker Entry

- Click on the Time Tracker tab in the Navigation Bar
- Find the entry to clone.
- Click on the **Three Dots** button next to the check box.
- Select the **Clone Record** button.

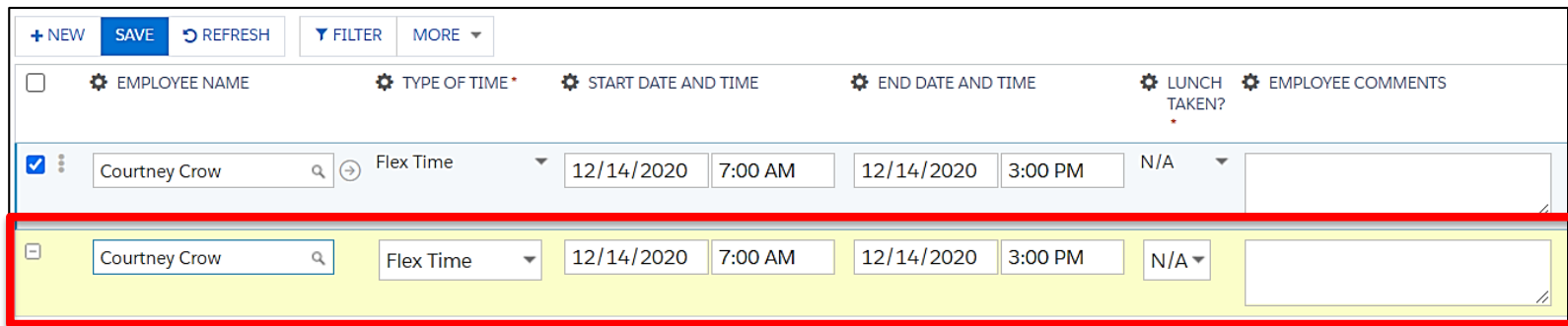


The screenshot shows the WATRS Time Tracker interface. The navigation bar includes 'WATRS', 'Contacts', 'Time Tracker' (selected), 'Reports', and 'WATRS Home'. Below the navigation bar is a 'Create Time Tracker' button. The main content area features a table with columns for 'EMPLOYEE NAME', 'TYPE OF TIME', and 'START DATE AND TIME'. A table row for 'Courtney Crow' is shown with a 'Flex Time' type and a start date of '12/14/2020' at '7:00 AM'. A 'More' menu is open for this row, showing options: 'View record detail', 'Open record detail', and 'Clone record'. The 'Clone record' option is highlighted with a red box. The 'More' button in the table header is also highlighted with a red box.



Cloning a Time Tracker Entry (continued)

- Once the Clone Record button is selected, a copy of the time entry selected will appear.



The screenshot shows a web application interface for time tracking. At the top, there are buttons for '+ NEW', 'SAVE', 'REFRESH', 'FILTER', and 'MORE'. Below these are columns for 'EMPLOYEE NAME', 'TYPE OF TIME', 'START DATE AND TIME', 'END DATE AND TIME', 'LUNCH TAKEN?', and 'EMPLOYEE COMMENTS'. The first row shows a selected entry for Courtney Crow, Flex Time, on 12/14/2020 from 7:00 AM to 3:00 PM, with 'N/A' for lunch. A second, identical row is highlighted in yellow and outlined in red, representing the cloned entry.

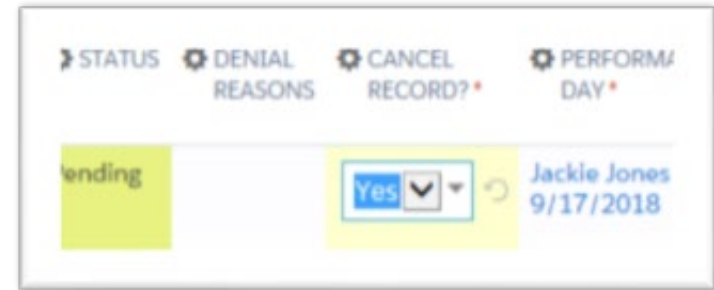
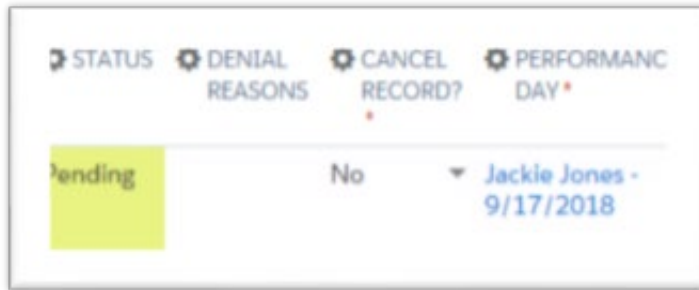
<input type="checkbox"/>	EMPLOYEE NAME	TYPE OF TIME	START DATE AND TIME	END DATE AND TIME	LUNCH TAKEN?	EMPLOYEE COMMENTS
<input checked="" type="checkbox"/>	Courtney Crow	Flex Time	12/14/2020 7:00 AM	12/14/2020 3:00 PM	N/A	
<input type="checkbox"/>	Courtney Crow	Flex Time	12/14/2020 7:00 AM	12/14/2020 3:00 PM	N/A	

- Update the information in the cloned entry.
- Click **Save**.



Cancelling a Time Tracker Entry

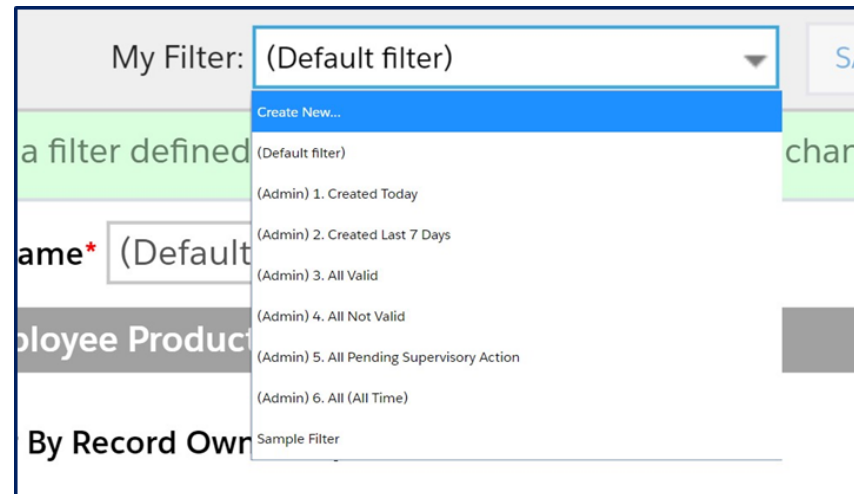
- If a created entry is no longer needed, users must cancel the record as WATRS does not have a delete function.
- Identify the record to be cancelled, scroll to the column **Cancel Record?** and change from "No" to "Yes."



- Click **Save**.
- The status of the record will show as *Cancelled*.

Creating a New Filter

- Users can create a customized filter by navigating to the Time Tracker function bar and clicking on **Filter**
- Select the **Create New** option from drop down



- Enter a new name for the filter

A screenshot of a web application interface showing a text input field for a filter name. The field is labeled "Filter Name*" and contains the text "Demo Filter". The input field is highlighted with a blue border.

Creating a New Filter (continued)

- Check the object(s) in the **Filter By Field** to sort by. Create as many as needed using the **Add** button.

Filter By Field				
1.	Owner	equals	SUser.Name()	Clear
2.	Created Date	equals	TODAY	Clear
3.	Average Time to Handle (Days)	less than	15 days	Clear
				Add

- Enter **Group by Field** section by selecting **Grouped Field**, **Sort By**, and **Sort Direction**.

Group By Field				
	Grouped Field	Sort By	Sort Direction	
1.	Claim Processing Priority	Record Count	Ascending	Clear
				Add

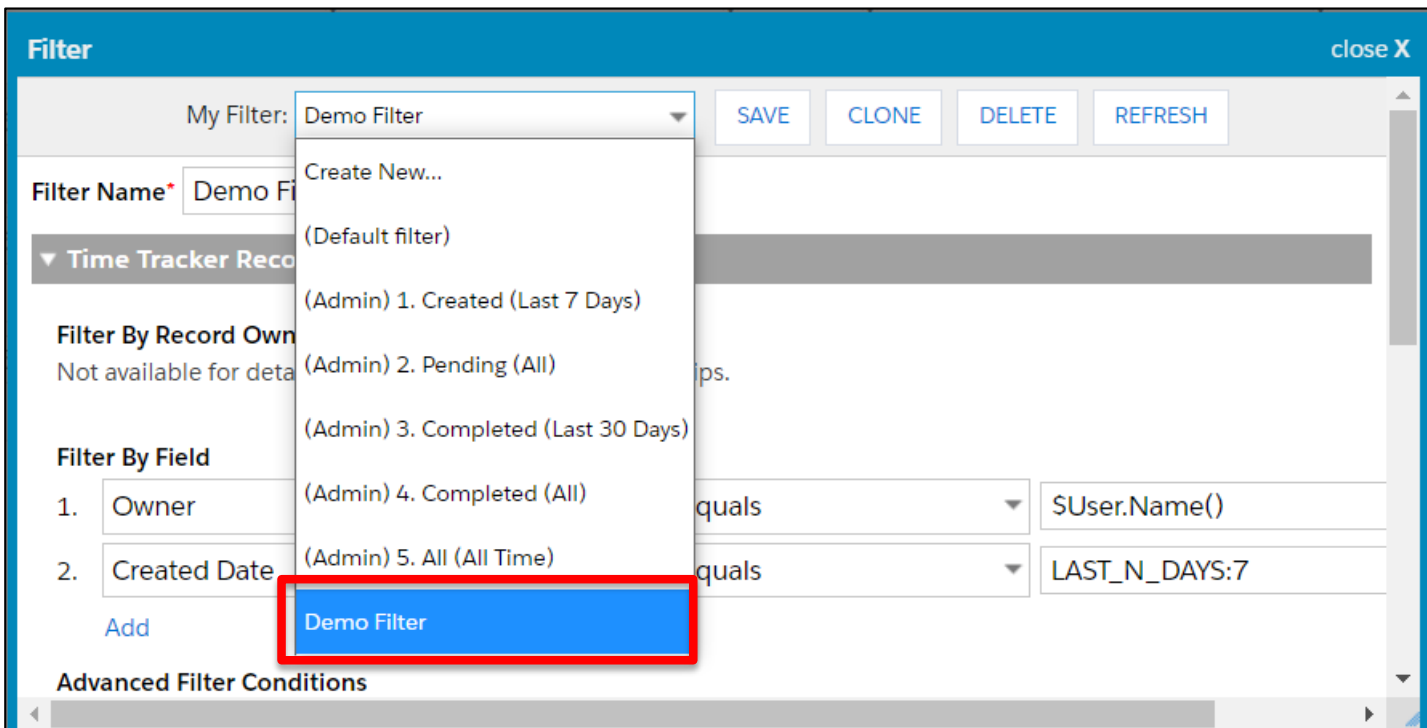
- Click **Save**.

My Filter: Create New... **SAVE** CLONE



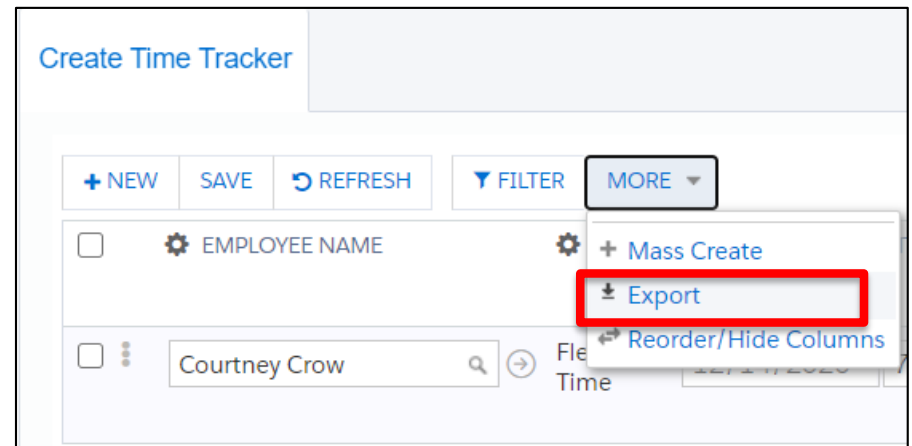
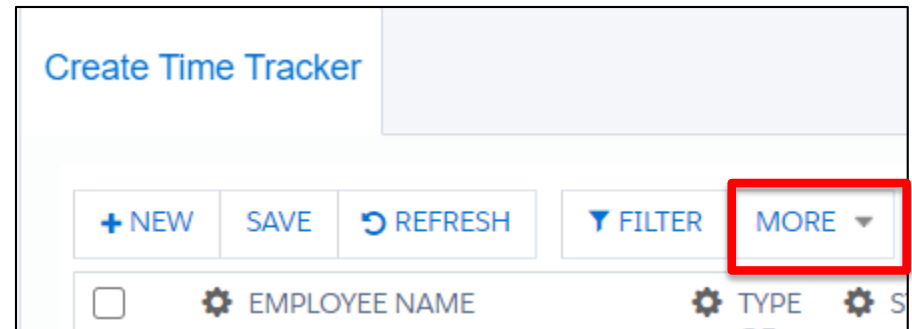
Creating a New Filter (continued)

- The newly created filter will appear in the **My Filter** drop down list on the right top corner.



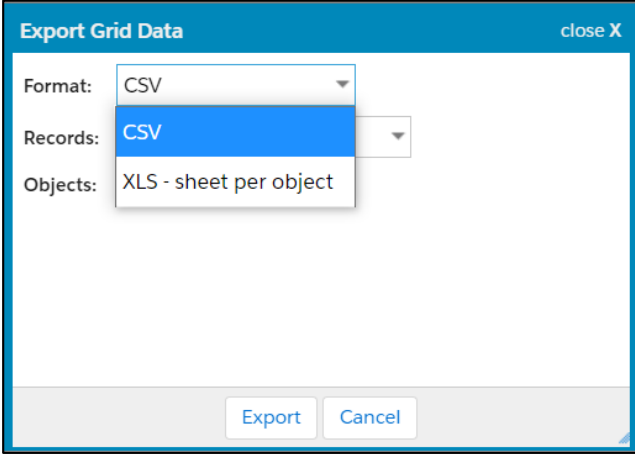
Exporting Records

- Users can export their records for review in a comma-separated values (.csv) or Excel (.xls) file
- Navigate to the **Create Time Tracker** tab and then select **More**
- Select **Export** from the dropdown menu.



Exporting Records (continued)

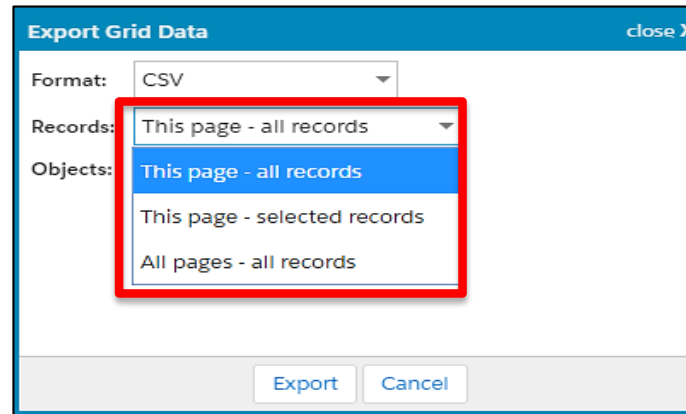
- A new pop-up window will appear with “CSV” selected as the Format and “This page – all records” selected for Records.
- Under the format dropdown, select either XLS or CSV export file format.



The screenshot shows a dialog box titled "Export Grid Data" with a "close X" button in the top right corner. It contains three dropdown menus: "Format:" set to "CSV", "Records:" set to "This page - all records", and "Objects:" set to "XLS - sheet per object". At the bottom, there are two buttons: "Export" and "Cancel".

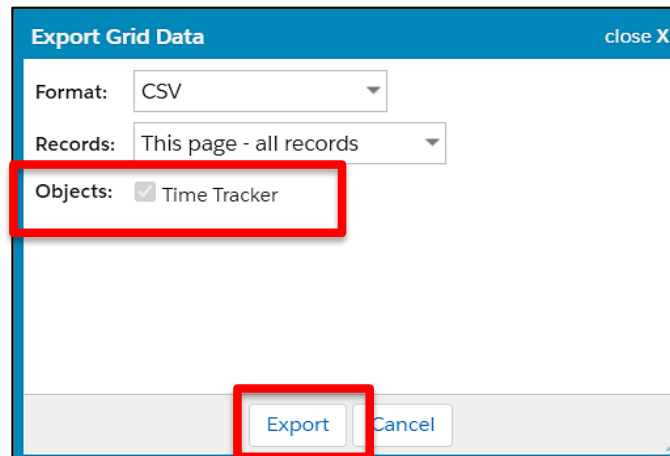
Exporting Records (continued)

- Use the dropdown to choose the **Records** to export



The screenshot shows the 'Export Grid Data' dialog box with the 'Records' dropdown menu open. The 'Format' is set to 'CSV'. The 'Records' dropdown is open, showing three options: 'This page - all records' (selected), 'This page - selected records', and 'All pages - all records'. The 'Objects' dropdown is also open, showing three options: 'This page - all records', 'This page - selected records', and 'All pages - all records'. The 'Export' and 'Cancel' buttons are visible at the bottom.

- Indicate the **Objects** to export and then click **Export**



The screenshot shows the 'Export Grid Data' dialog box with the 'Objects' checkbox checked. The 'Format' is set to 'CSV'. The 'Records' dropdown is set to 'This page - all records'. The 'Objects' checkbox is checked, and the text 'Time Tracker' is visible next to it. The 'Export' and 'Cancel' buttons are visible at the bottom.



Troubleshooting and Resources

- **Creating a Help Ticket for WATRS**
 - There are instructions on “Filling out a Help Desk Ticket” which can be found at the following URL:
<https://vbaw.vba.va.gov/OFO/watrs.asp>
- **WATRS Resources**
 - Additional WATRS resources can be found at:
<https://vbaw.vba.va.gov/OFO/watrs.asp>
 - Employee User Guide for WATRS
 - Job Aids located at the WATRS SharePoint



Next Steps

- A survey has been assigned to you in TMS
- Be sure to complete the survey to receive credit for this training.

