OFFICE OF ADMINISTRATIVE REVIEW

DRO WATRS Training (GridBuddy)

December 2020

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

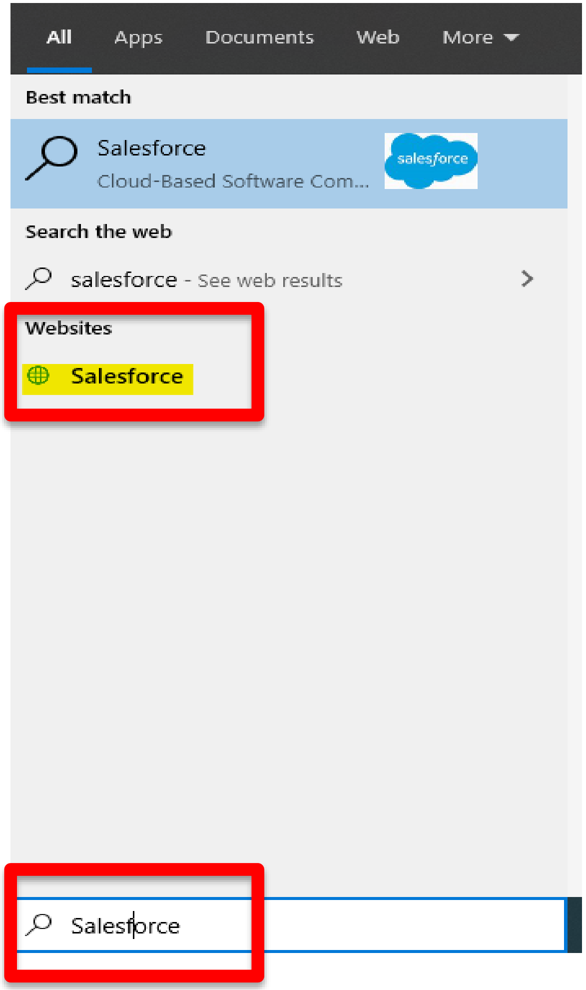
- Introduce users to Workforce and Time Reporting System (WATRS)
- Familiarize users with entering time tracker entries for excluded time, premium time, and flex time as well as other functions to enhance the user experience

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.

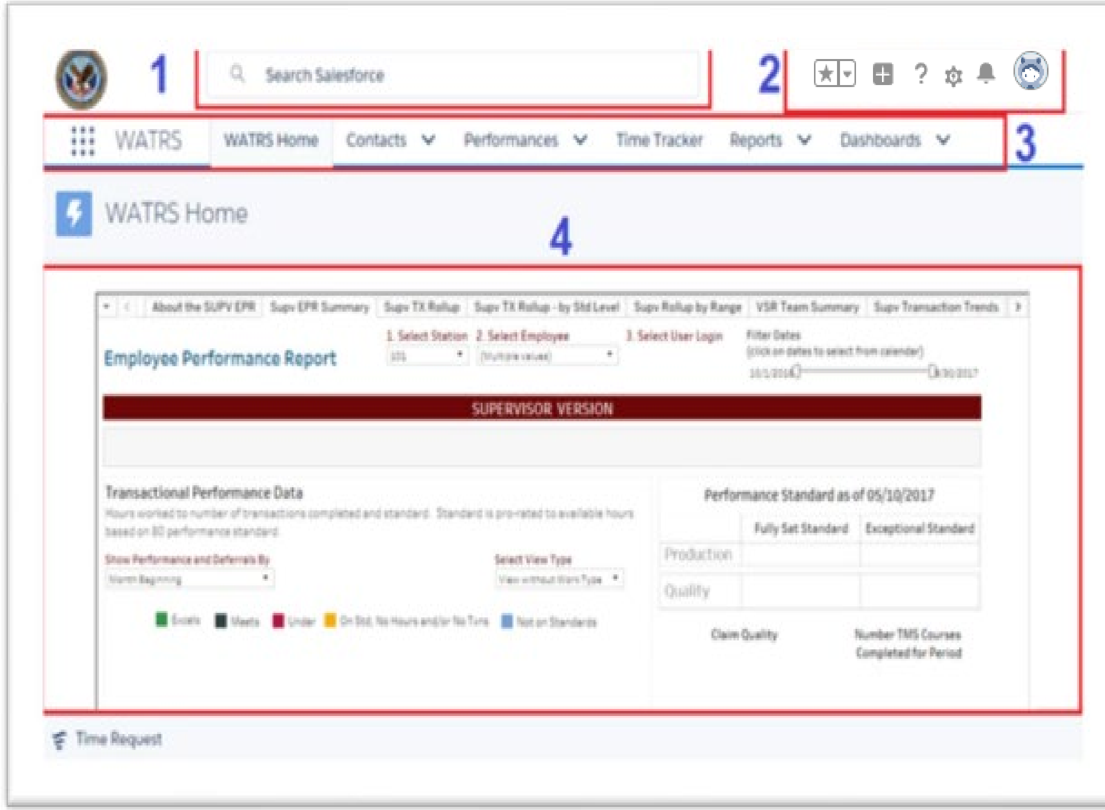
Accessing WATRS

- 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”.



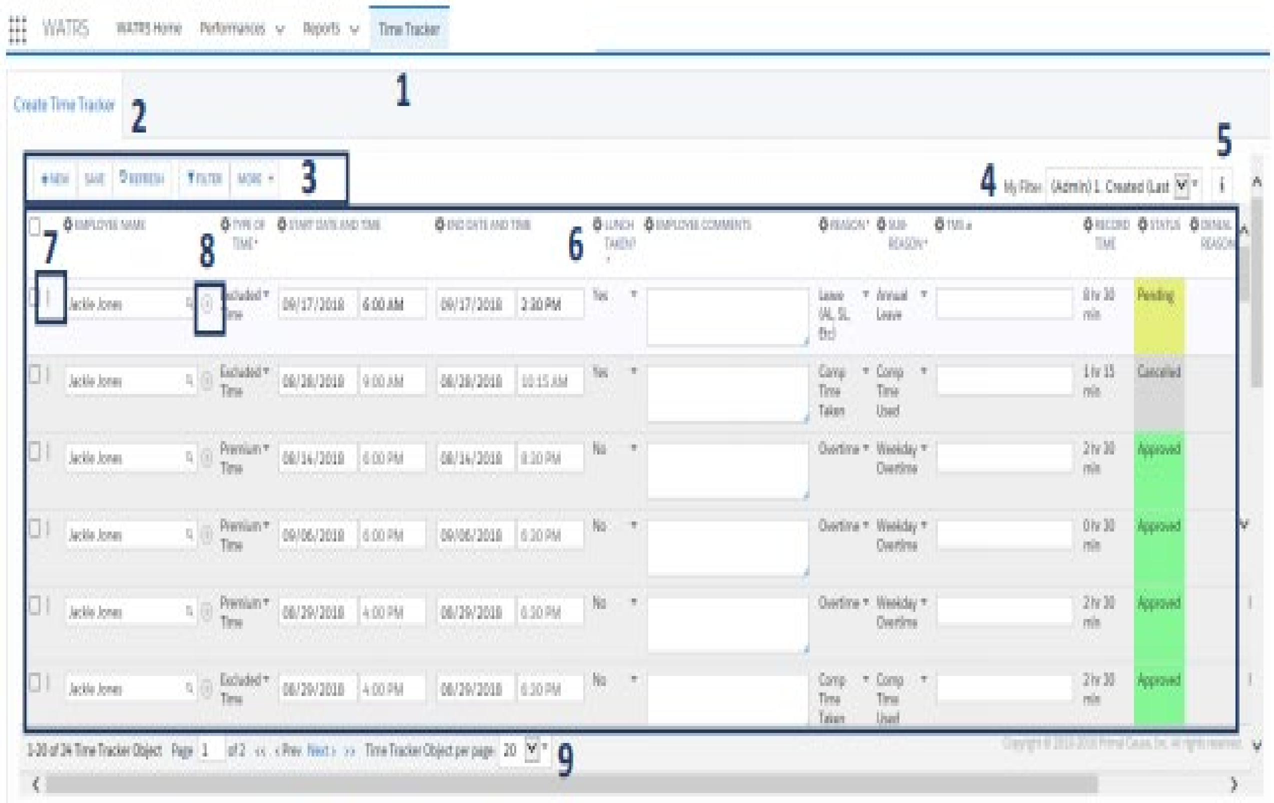
WATRS Home Page

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



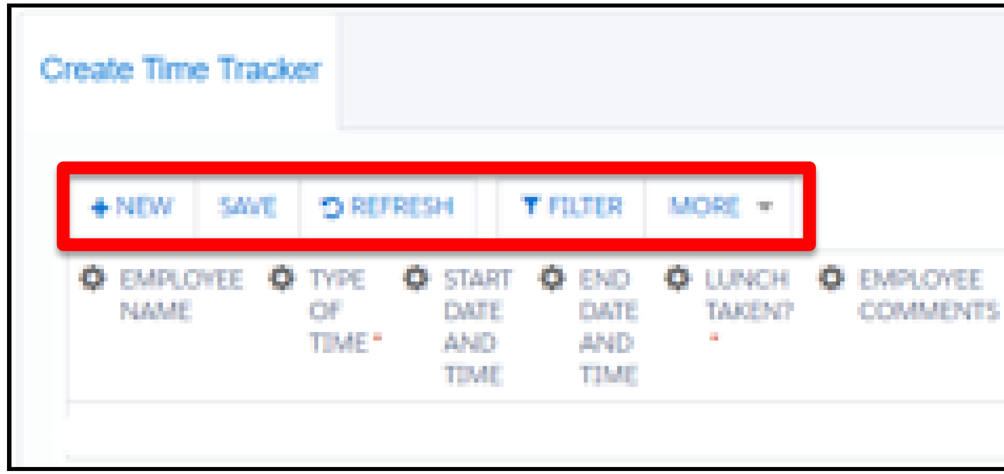
Time Tracker Overview

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



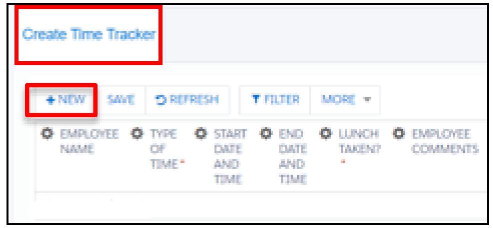
Time Tracker Functions

- 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

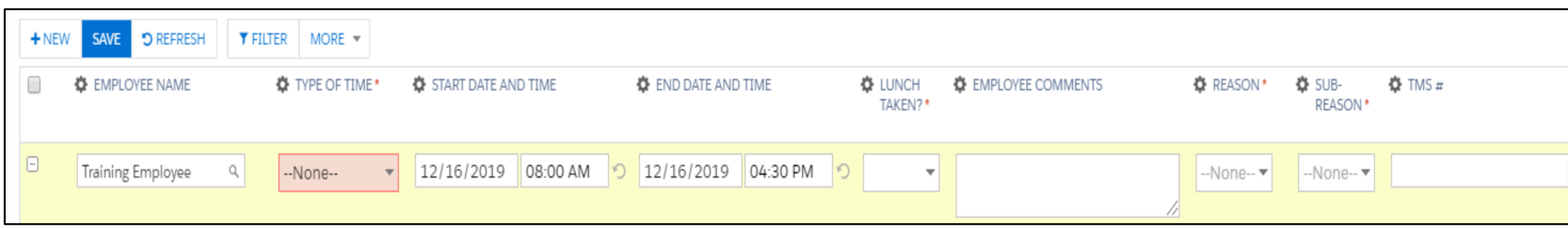


Creating a Time Tracker Entry

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

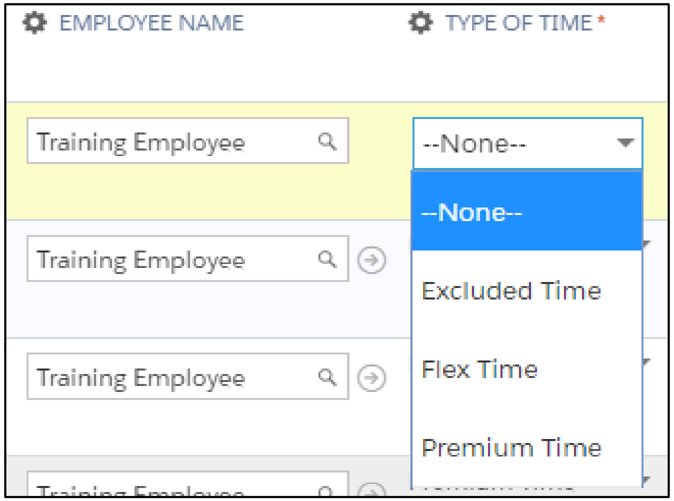


- A new time entry record will appear with some pre-populated fields.



Creating a Time Tracker Entry (continued)

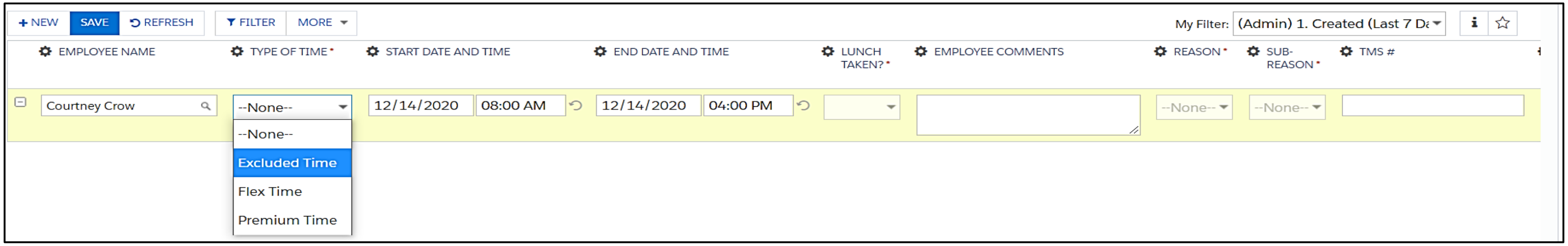
- Select the "Type of Time"
  - ***Excluded time*** is any time spent away from production hours, such as training, leave, etc.
  - ***Flex time*** is entered when deviating from a normal workday and must equal the same hours as user's normal tour of duty
  - ***Premium time*** is entered when any time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



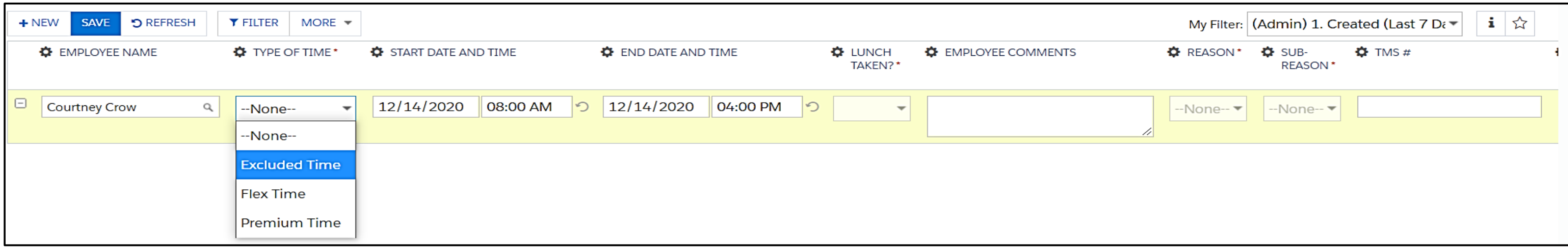
Scenario 1: Excluded Time Entry

- 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.

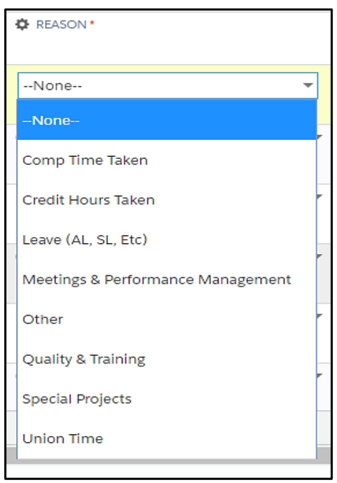


Scenario 1: Excluded Time Entry (continued)



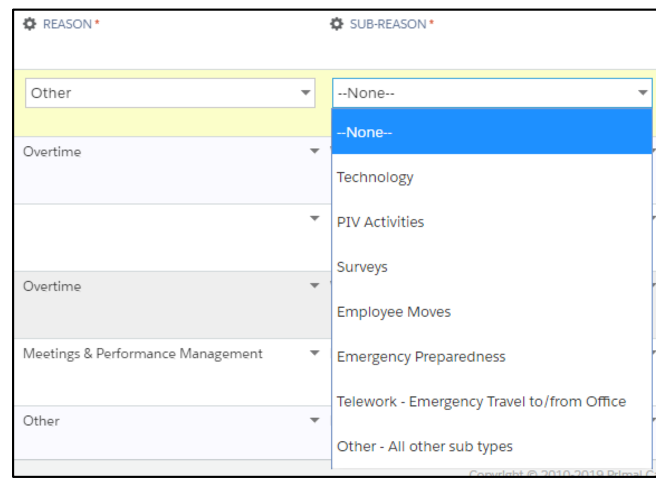
- Select ***Reason***

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

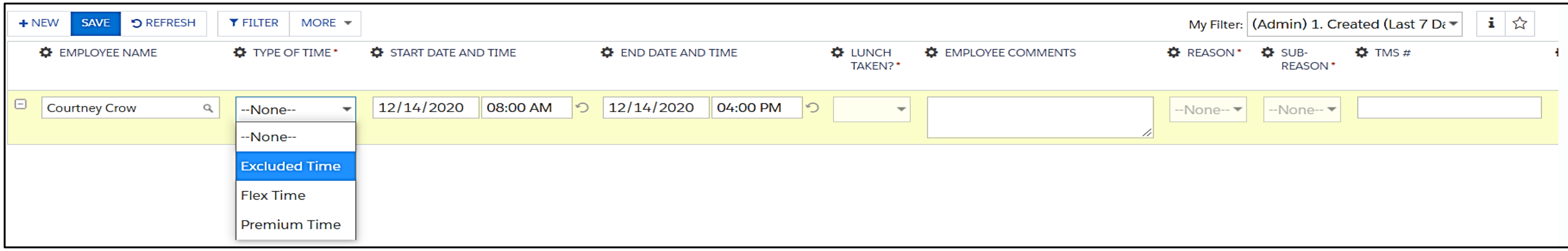


- Select ***Sub-Reason***

Select the appropriate sub-reason for the entry.



Scenario 1: Excluded Time Entry (continued)



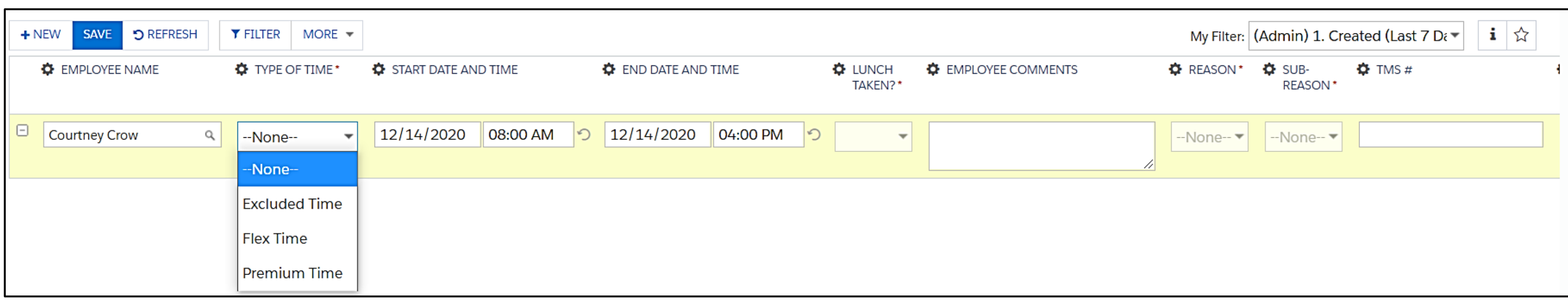
- Note: If an excluded time entry is for TMS training, then the ***TMS #*** field will need to be filled.
- Once the entry is completed, then click on ***Save***.
  - If any changes were made to a record that is not saved, the ***Save*** button will be blue/active.
  - If an entry is incorrectly filled 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.

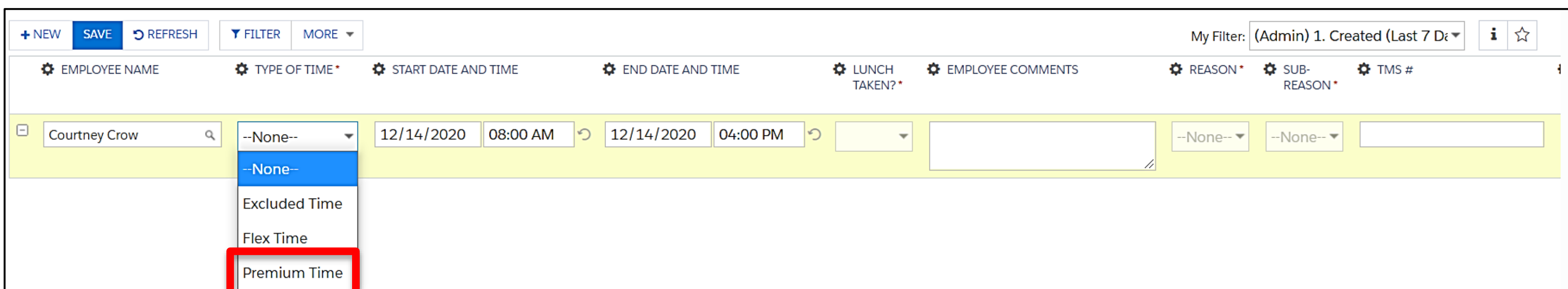
- Click ***Save***.
- Once the entry is completed, then click on ***Save***.
  - Once saved, the status will be in *Pending* status until the supervisor cancels or approves the entry.



Scenario 3: Premium Time Entry

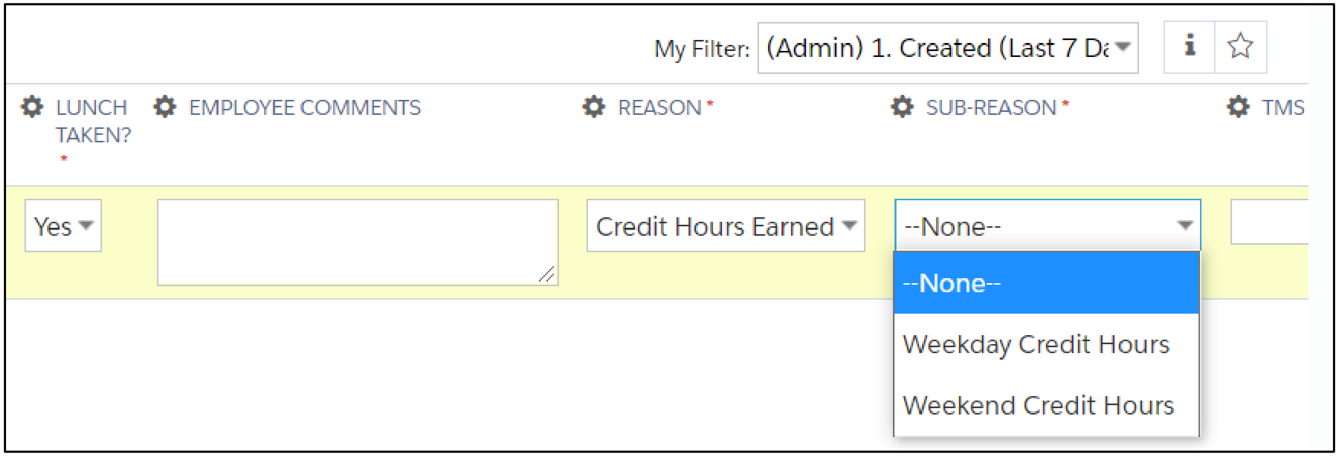
- Select ***Premium Time***
- Enter the appropriate ***Start Date and Time*** and ***End Date and Time*** for the premium time
- Add ***Employee Comments***, if applicable for the supervisor's knowledge.

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



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.



- 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:

Veterans Benefit Administration
Regional Office

Dear "Employee Name"

You are receiving this message because one of your Time Tracker entries was denied by "Supervisor Name"

Here is a link to the entry. As a reminder, once an entry is denied, it cannot be edited. If an updated entry is required, you can clone the denied entry to edit and resubmit. Instructions on how to clone an entry are in the WATRS Employee User Guide.

Denial Reason: Incorrect reason
Coach's Comments (if applicable): Need IT #

Respectfully,

"Supervisor Name", who denied the entry

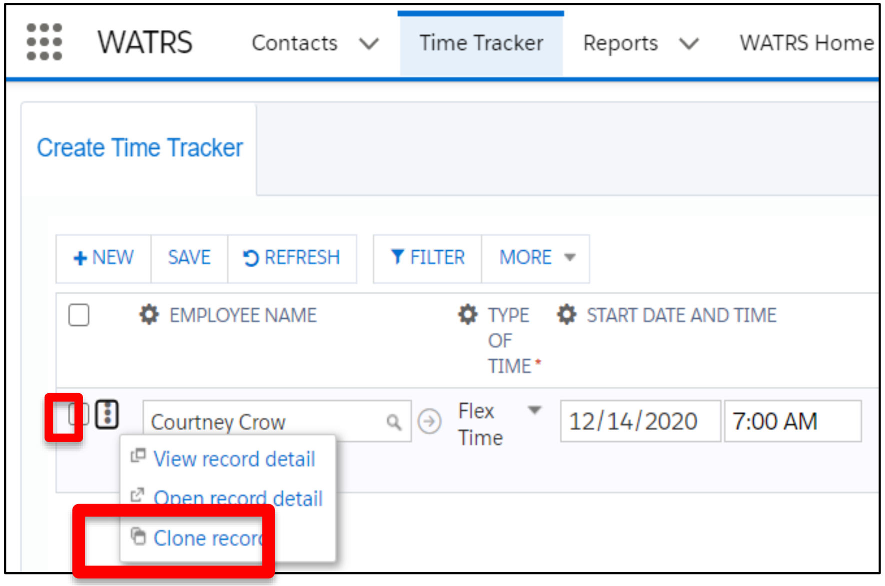
When a Time Tracker Entry is Denied (continued)

- 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.

> **Veterans Benefit Administration**
> **Regional Office**
>
> Dear "Employee Name"
>
> You are receiving this message because one of your Time Tracker entries was denied by "Supervisor Name"
>
> Here is a link to the entry. As a reminder, once an entry is denied, it cannot be edited. If an updated entry is required, you can clone the denied entry to edit and resubmit. Instructions on how to clone an entry are in the WATRS Employee User Guide.
>
> **Denial Reason:** Incorrect reason
> **Coach's Comments (if applicable):** Need IT #
>
> Respectfully,
>
> "Supervisor Name", who denied the entry

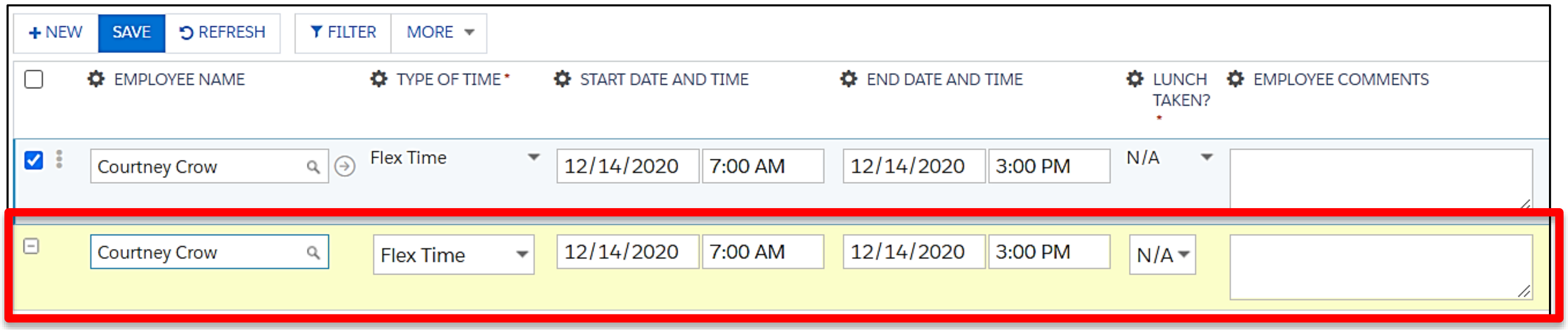
Cloning a Time Tracker Entry

- 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.



Cloning a Time Tracker Entry (continued)

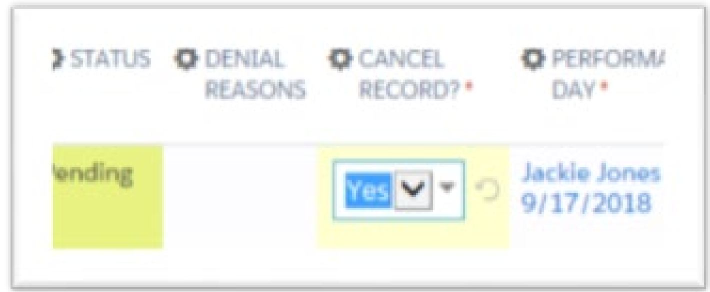
- Once the Clone Record button is selected, a copy of the time entry selected will appear.



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

Cancelling a Time Tracker Entry

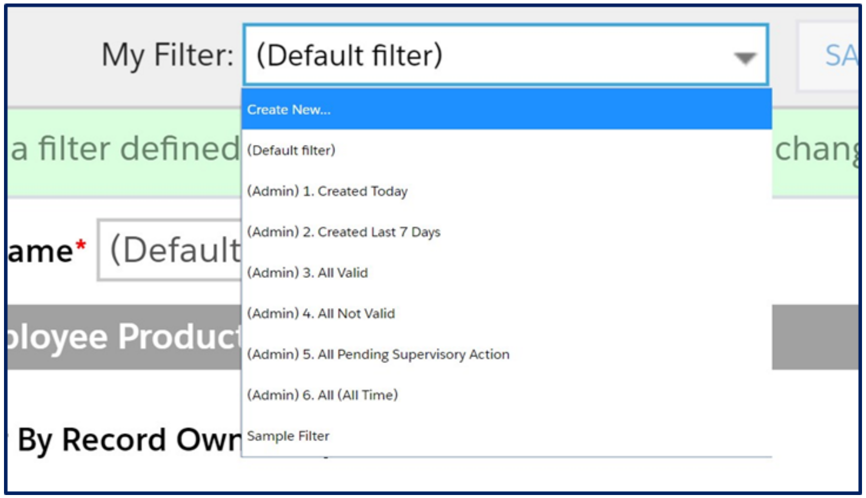
- If a created entry is no longer needed, users must cancel the record as WATRS does not have a delete function.
- Identify the record to be cancelled, scroll to the column **Cancel Record?** and change from “No” to “Yes.”



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

Creating a New Filter

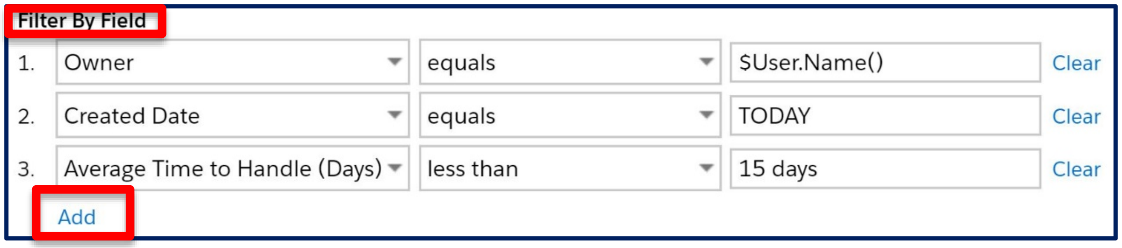
- Users can create a customized filter by navigating to the Time Tracker function bar and clicking on ***Filter***
- Select the **Create New** option from drop down



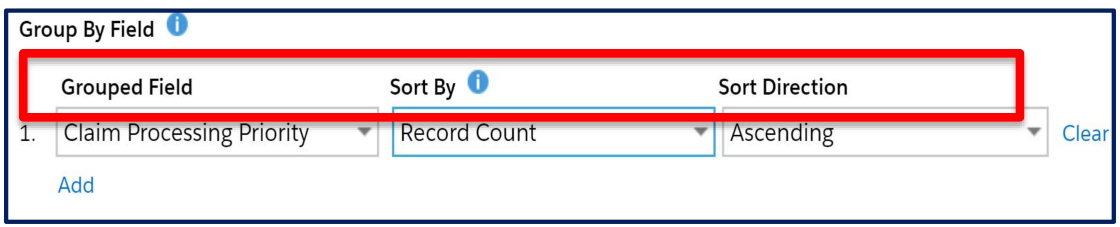
- Enter a new name for the filter

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.



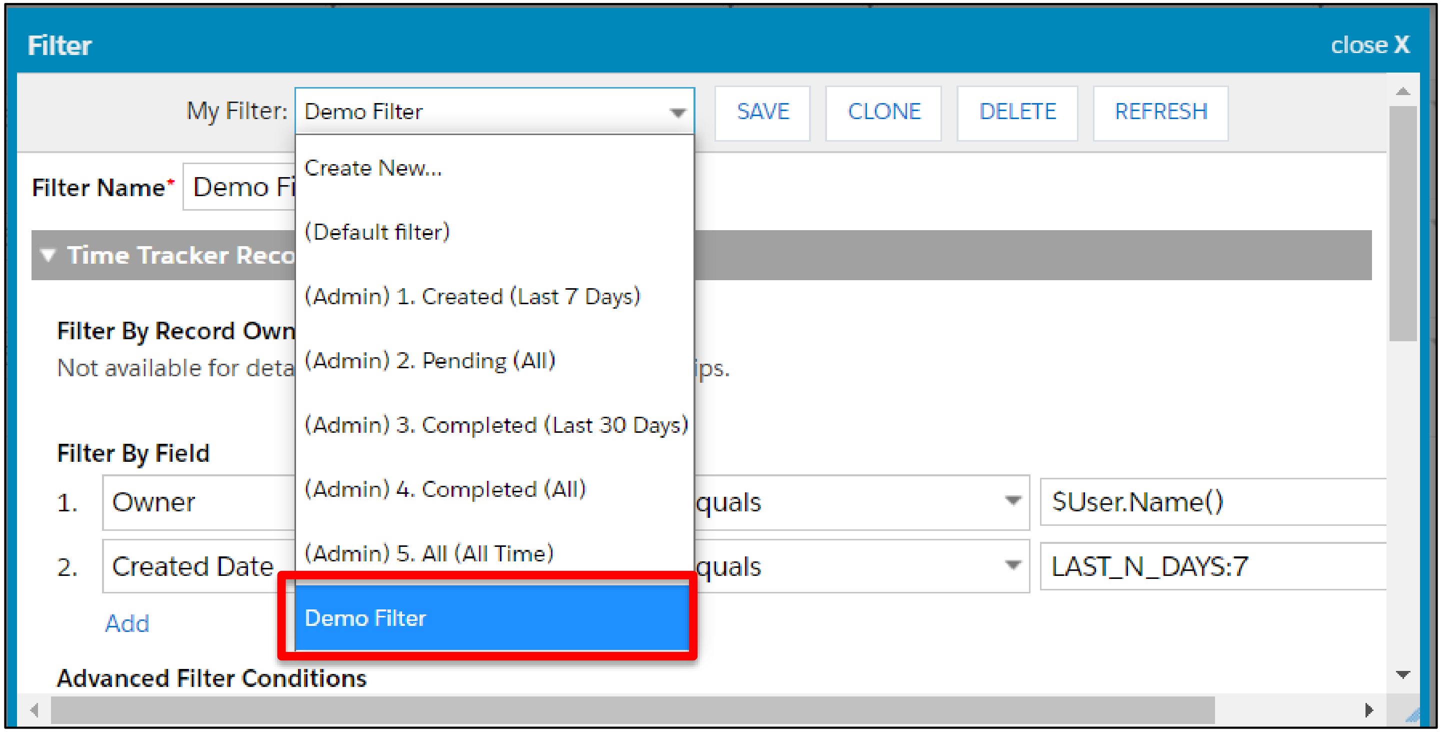
- Enter **Group by Field** section by selecting **Grouped Field, Sort By,** and **Sort Direction**.



- Click **Save.**

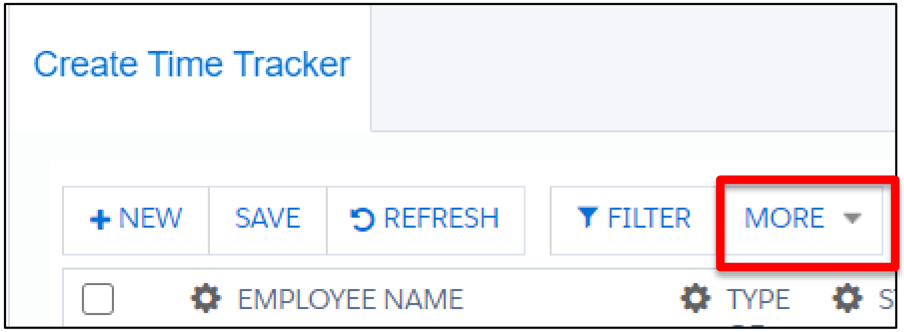
Creating a New Filter (continued)

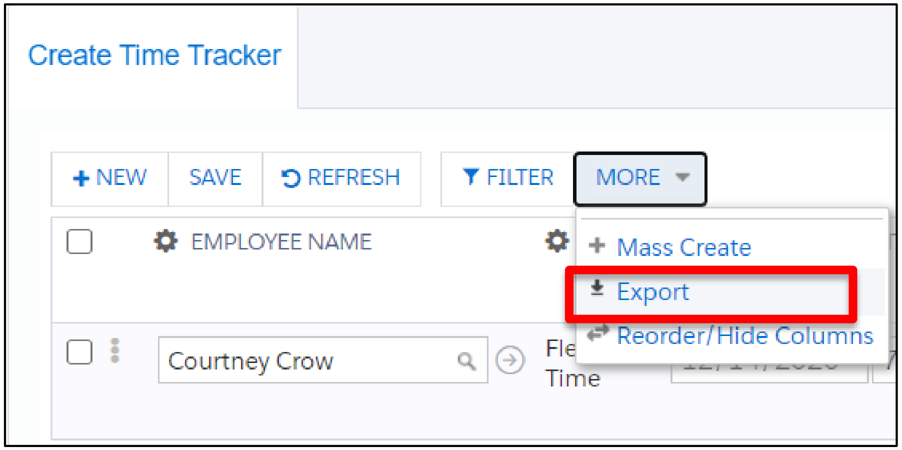
- The newly created filter will appear in the **My Filter** drop down list on the right top corner.



Exporting Records

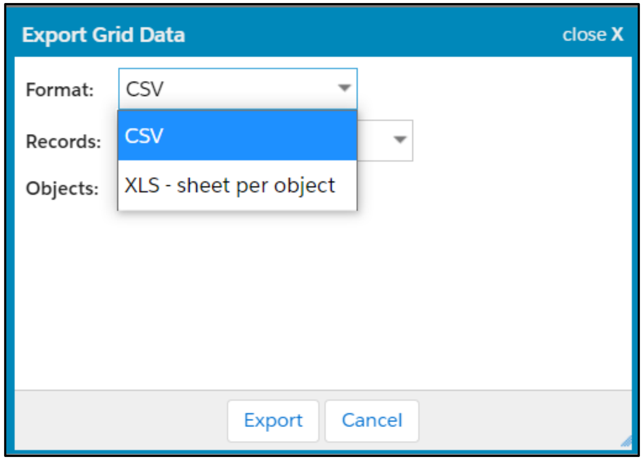
- Users can export their records for review in a comma-separated values (.csv) or Excel (.xls) file
- Navigate to the **Create Time Tracker** tab and then select **More**
- Select **Export** from the dropdown menu.





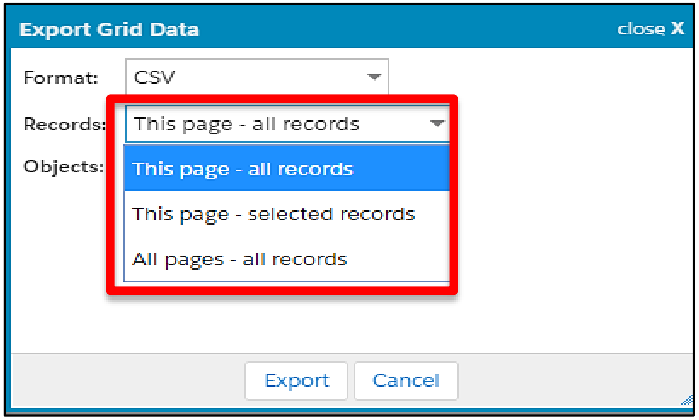
Exporting Records (continued)

- 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.

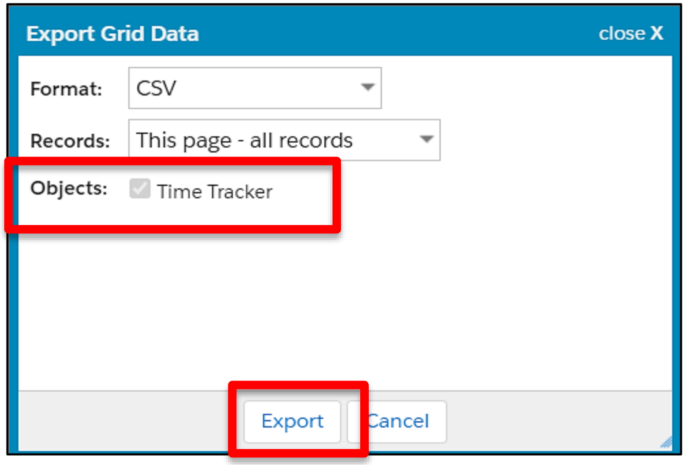


Exporting Records (continued)

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



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



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.