WORKLOAD AND TIME REPORTING SYSTEM - WATRS

Employee Guide for Employees and Supervisors

Employee Manual for the Workload and Time Reporting System June 2017
Veterans Benefits Administration
Office of Field Operations

Document Revision Sheet

Reference Number	Date	Revision Description
Revision 1	03/23/17	WATRS Employee Guide
Revision 2	05/30/2017	WATRS Employee Guide 2.0

Table of Contents

1.0 General Information

1.1 System Overview

WATRS is an application inside the Salesforce platform. WATRS is the replacement for the ASPEN tool. In WATRS users will be able to enter Time Tracker items for both excluded time and premium pay time. Users will also be able to view their performance via the Employee Performance Report located on the WATRS Home Page.

1.2 Organization of the Manual

The employee guide is divided into two sections: the employee section and the supervisor section. To view the sections of the manual, click the "View" tab at the top.

2.0 Introduction

Workload and Time Reporting System (WATRS) is the replacement tool for ASPEN. WATRS allows the employee to enter deductible time and premium time; review production as completed in VBMS; view performance by day with a summary of production and excluded time; and view the status of performance as it relates to the employee's standard.

- This guide will provide step-by-step instructions to the employee and supervisor on how-to complete critical tasks within WATRS; how-to navigate in WATRS; and how to review pertinent employee information within WATRS.
- This employee guide will provide step-by-step instructions on how to creating a new time tracker entry.
- To move around within the user guide, use the Microsoft Word Navigation Pane or use the Table of Contents found on page two to go to a specific section of the guide.

2.1 Acronyms

Acronym	Definition
WATRS	Workload and Time Reporting System
ASPEN	Automated Standardized Performance Elements Nationwide

2.2 How To Log In

Instructions for logging into the WATRS test environment.

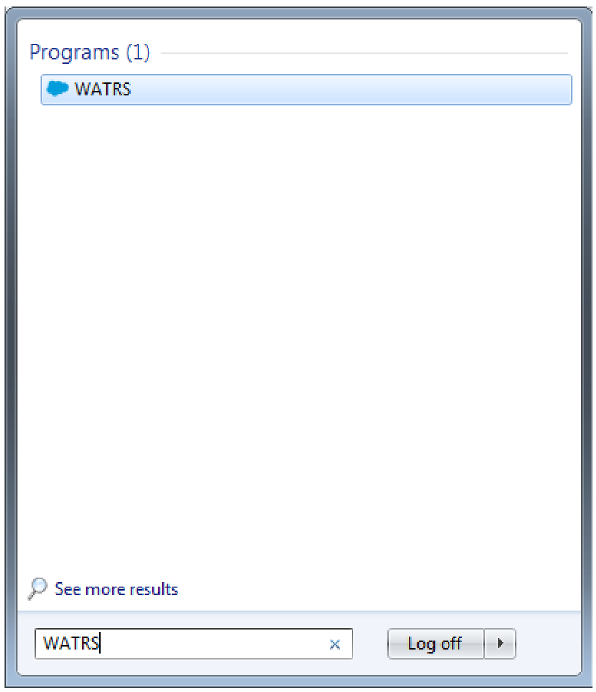
Click on the below link: https://va--staging.cs33.my.salesforce.com

Instructions for logging into the WATRS production environment.

Click on the below link: https://va.my.salesforce.com/

WATRS can be accessed by opening the “Start Menu” on your desktop and typing “WATRS” into the search field. Click the WATRS shortcut that appears.
(see Figure 1).

Figure 1. Logging into WATRS



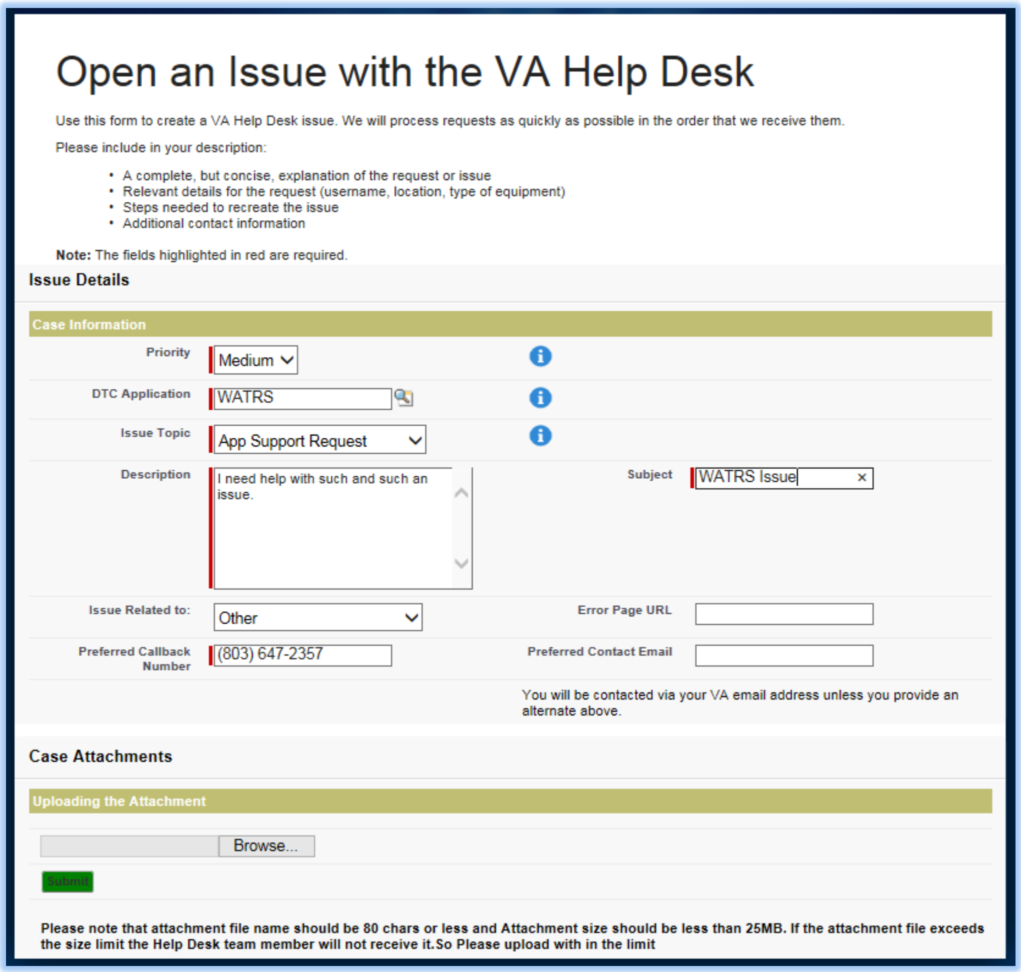
2.3 Creating a Help Ticket

To create a trouble ticket, navigate to the following URL:

https://vacommunity.secure.force.com/helpdesk

Fill out the form as shown below and be as specific as possible about the issue that is encountered. Provide the URL for the page in WATRS where the issue was encountered.

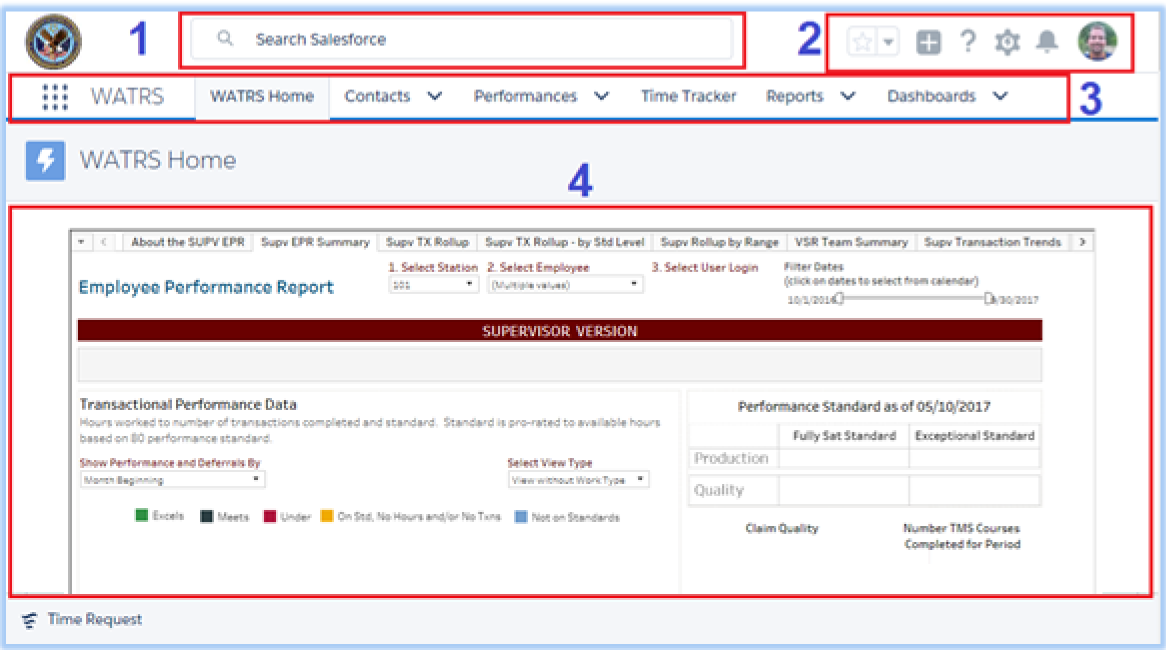
Figure 2. VA Help Desk Open an Issue Form



2.4 Home Page Overview

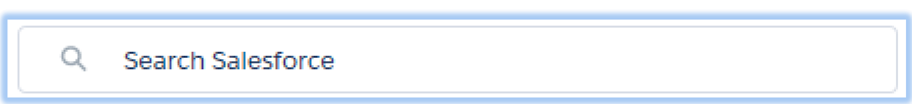
The "WATRS Home" is the default page that displays when one enters WATRS. It displays helpful information that includes: the time tracker entry form at the bottom of the Employee Performance Report (EPR), recently viewed items, time tracker entries for the current employee, and a chart that shows pending time tracker records for supervisors. The EPR section will change based on whether the employee is a Bargaining Unit Employee (BUE) such as a VSR or is a Non-Bargaining Unit Employee (NBUE) such as a supervisor.

Figure 3. WATRS Home Page



1. This is the global search field for WATRS; search for names of contacts, performance records and time tracker entries.

Figure 4. Global Search



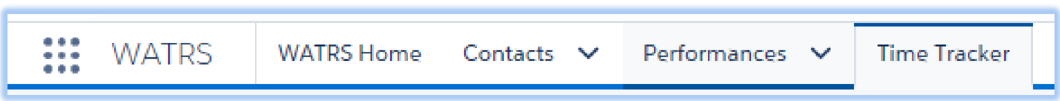
2. From the WATRS “Quick Actions” section, from left to right the options are:

Figure 5. Quick Actions

   a. Favorites – Allows for the current page to be set as a favorite.
   b. New Task – Allows for the creation of a new task.
   c. Help & Training – Contains additional information that pertains to Salesforce in general.
   d. Setup – Contains set-up options.
   e. Notifications – Shows notification items and alerts if there are any to be displayed.
   View Profile – Shows the employee’s employee name and settings for the employee’s profile.

3. The Navigation Bar. From left and right are:

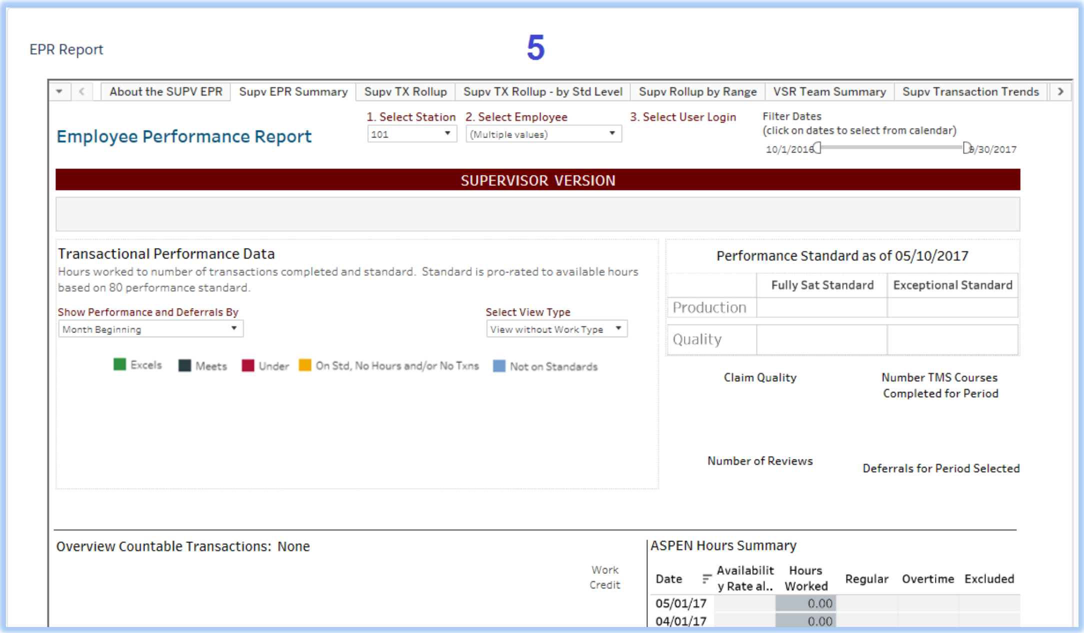
Figure 6. Navigation Bar



   a. WATRS Home –Shows the EPR, time tracker entries, recently access items, and a chart showing pending time tracker entries.
   b. Contacts – Can be used to look up other contacts in WATRS or to update the employee personal information.
   c. Performances – Contains a record for each day for each employee. Each performance record may contain multiple Time Tracker Records.
   d. Time Tracker – Allows for the employee to enter excluded time or premium pay. Existing Time Tracker entries can be viewed or edited here.
   e. Reports – Shows existing reports and allows for the creation of new reports.

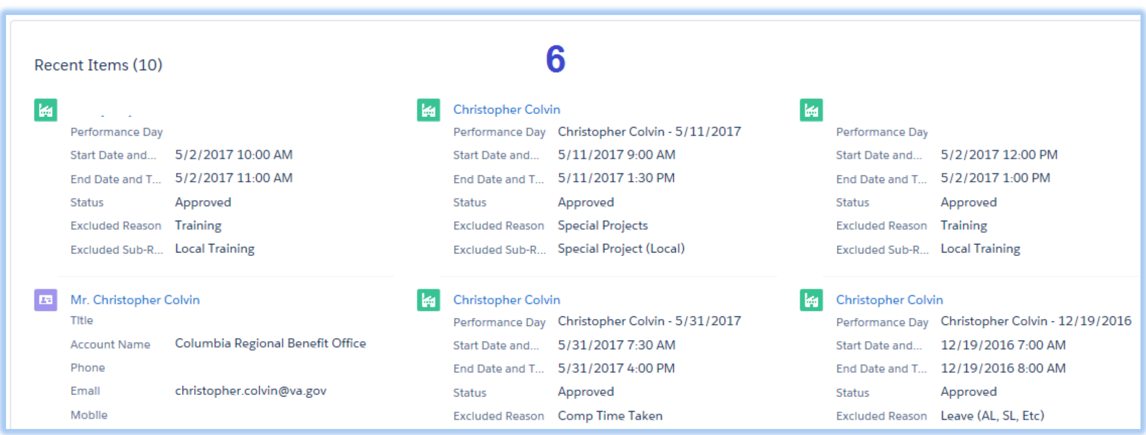
4. Employee Performance Report. Shows the EPR tool from PAI for checking employee performance (see Figure 7).

Figure 7. Employee Performance Report



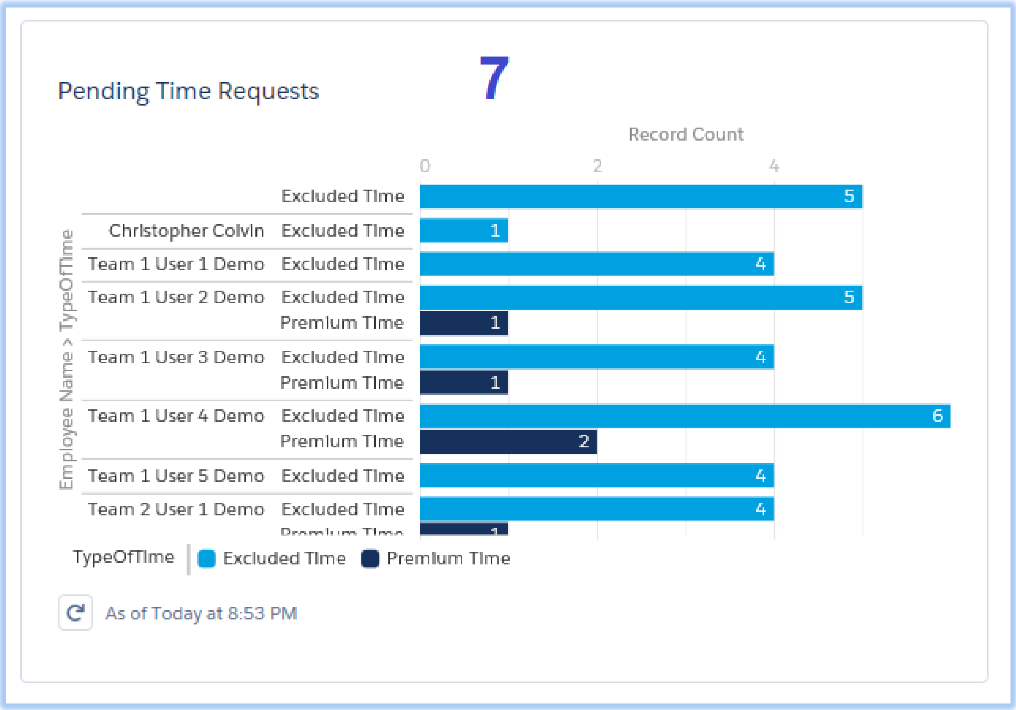
5. Recent Items. Shows the most recently viewed items in WATRS (see Figure 8).

Figure 8. Recent Items



6. Pending Time Requests. Shows a chart of the time tracker entries that are still pending (see Figure 9).

Figure 9. Pending Time Requests



7. My Entries. Shows a list of the employee's time tracker entries.

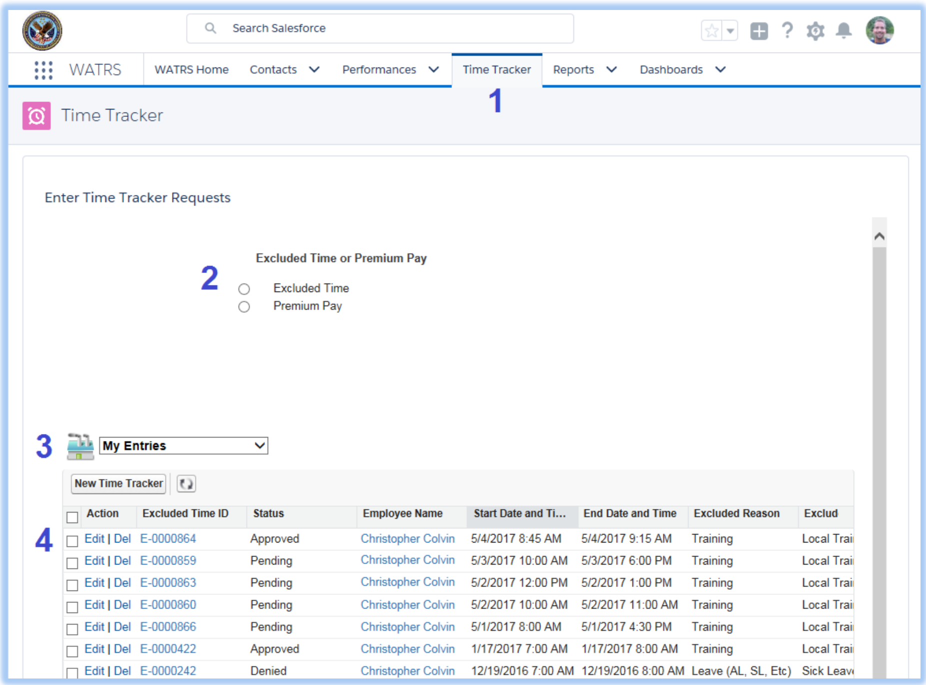
Figure 10. My Entries

3.0 Employee Instructions

3.1 Employee Time Tracker

The time tracker tab is a used to enter deductible time or premium time in WATRS (see Figure 11).

Figure 11. Time Tracker Overview



The above is a screen shot of the time tracker object in WATRS. To review time tracker entries for an entire day, please refer to the section on "performances". Please see the items below for further explanation.

1. The time tracker tab is located on the navigation bar and allows for quick access to the time tracker from anywhere within WATRS.
2. The top area allows for the employee to enter a new time tracker entry.
3. The "view" area is where a different "view" can be select to see time tracker entries. There are two "views" available.
    a. My Entries – Entries that pertain to the logged in employee.
    b. My Entries – Pending – Entries that pertain to the logged in employee.
4. This is the records section where time tracker entries can be seen with pertinent information in the columns. The columns are:
    a. Excluded Time ID – This is the identification number of the time tracker entry and can be clicked on to open the full detail page of the time tracker entry.
    b. Status – Current status of the time tracker entry. A status of "pending" indicates that the time tracker entry has not been approved by a supervisor yet. "Approved" indicates

that the time tracker entry has been approved by a supervisor. "Denied" indicates that the time tracker entry was not approved by a supervisor.

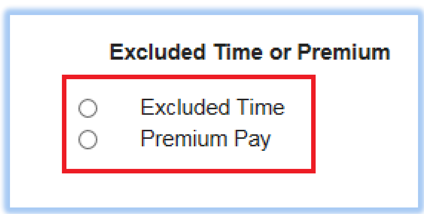
c. Employee Name – The name of the employee to which the time tracker entry pertains.
d. Start Date and Time of Excluded Time – Shows the start date and time of the "excluded time" or "premium pay" time tracker entry.
e. End Date and Time – The end date and time of the "excluded time" or "premium pay" time tracker entry.
f. Type Of Time – The time entry is an "excluded time" or "premium pay" time tracker entry.
g. Reason – The reason for the "excluded time" or "premium pay" time tracker entry. Reasons include "training," special projects," "leave", etc.
h. Sub-Reason – The sub-reason of the time tracker entry; examples of sub-reasons include "local training" or "TMS training" for the "training" reason or "annual leave" for "leave" reason.

3.1.1 New Time Tracker Entry

To create a new time tracker entry follow the below steps:

1. Click on the "time tracker tab" or the "time request" utility bar (at the bottom of the window) to open a new time tracker entry form.
2. Begin entering the information required for the time tracker entry. Select either "excluded time" or "premium pay" (see Figure 12).

Figure 12. Type of Time Tracker Entry



3. More options will appear (below) once “excluded time” or “premium pay” is selected. To continue select an option from the new items that appear (see Figures 12a and 12b).

Figure 13a. Excluded Time Reasons

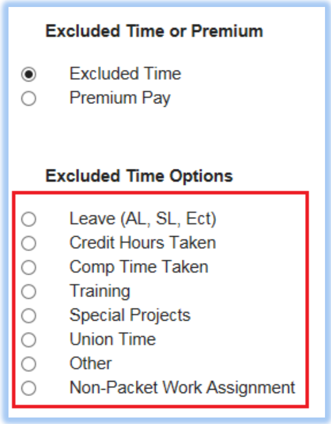
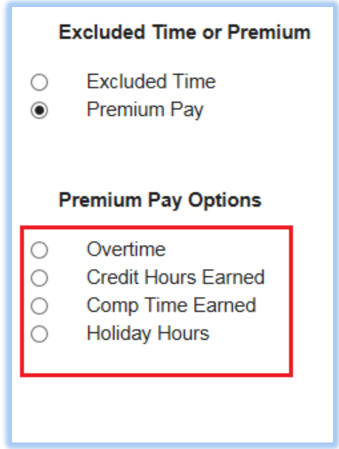
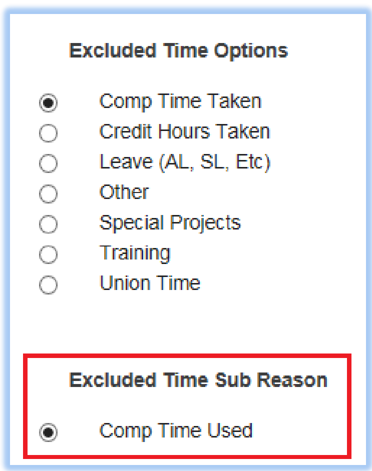


Figure 13b. Premium Pay Reasons



4. Select a “sub reason” (see Figure 14).

Figure 14. Sub Reason

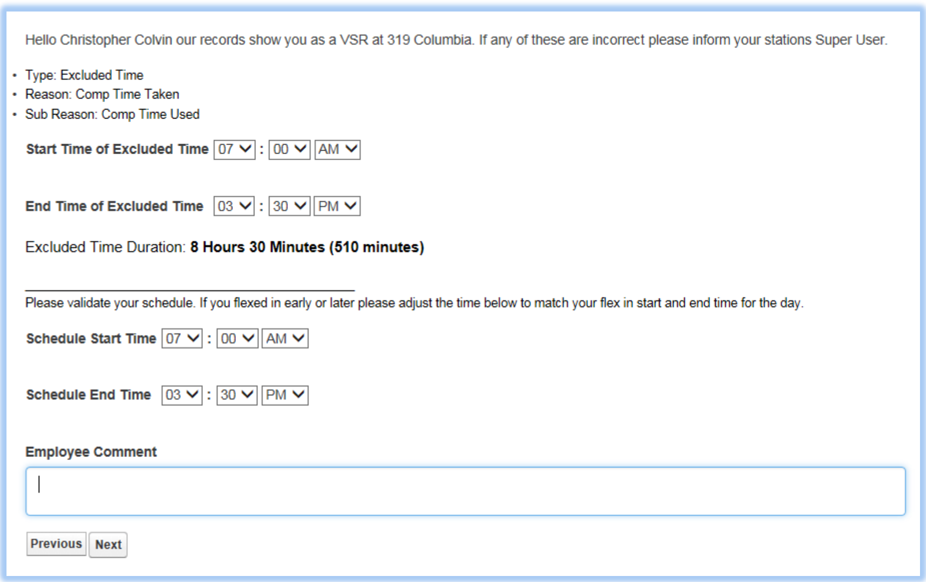


5. After a “sub reason” is selected enter a start and end date. Please note that a calendar drop down window will appear to assist in picking a date (see Figure 15).

Figure 15. Date of Time Tracker Entry

6. Once a date is entered select the [Next] button and a new page will open and requesting additional information that needs to be entered (see Figure 16).

Figure 16. Additional Time Tracker Information



   a. Enter the “start time”.
   b. Enter the “end time”.
   c. The last two fields refer to the start and end times of an employee’s schedule. These fields will be prepopulated with the employee’s core time (as listed in VATAS); however, if the employee has a flex schedule and has started working earlier or later than their core time, then they should update these last two fields to indicate the actual time work was started and ended for the day.
   d. Enter any comments in the employee comment field.
   e. Finally, click the next button at the bottom to create the time tracker entry.

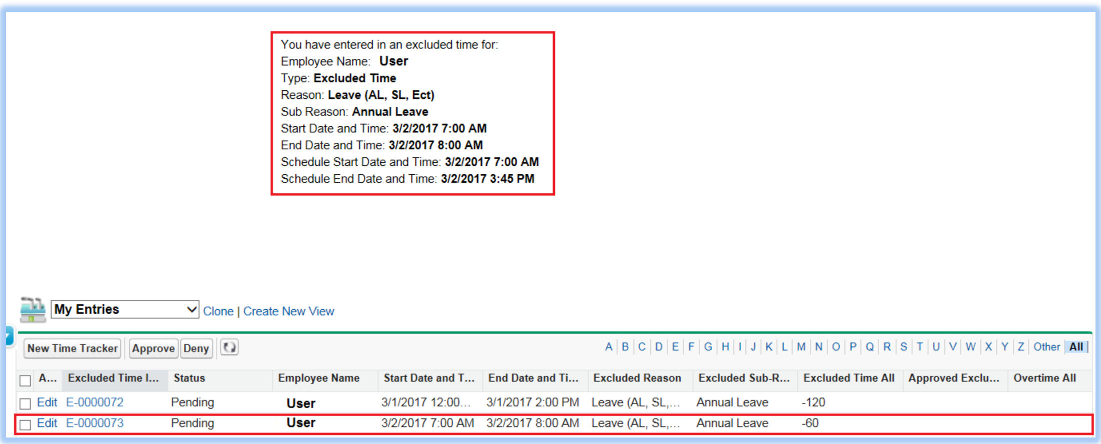
7. Once the time tracker entry is created, a summary page screen will display (see Figure 17).

Figure 17. Time Tracker Summary Screen

You have entered in an excluded time for:
Employee Name: **User**
Type: **Excluded Time**
Reason: **Leave (AL, SL, Ect)**
Sub Reason: **Annual Leave**
Start Date and Time: **3/2/2017 7:00 AM**
End Date and Time: **3/2/2017 8:00 AM**
Schedule Start Date and Time: **3/2/2017 7:00 AM**
Schedule End Date and Time: **3/2/2017 3:45 PM**

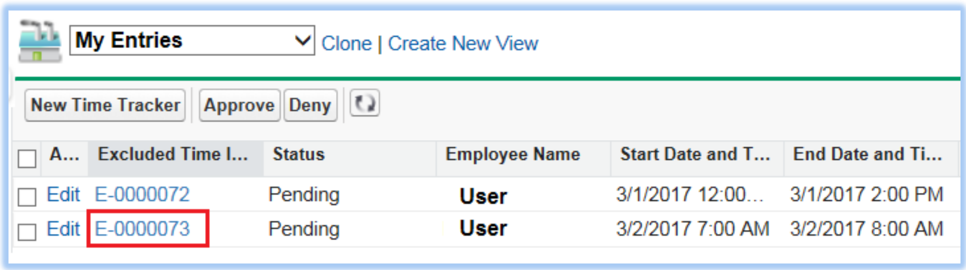
8. To view the time tracker entry that was just created, scroll to the bottom and look for the record that matches what was entered. Note that the record that was just created is showing a status of "pending". Once the supervisor approves the time tracker entry, the status will change to "approved" (see Figure 18).

Figure 18. Time Tracker Summary Screen and List View



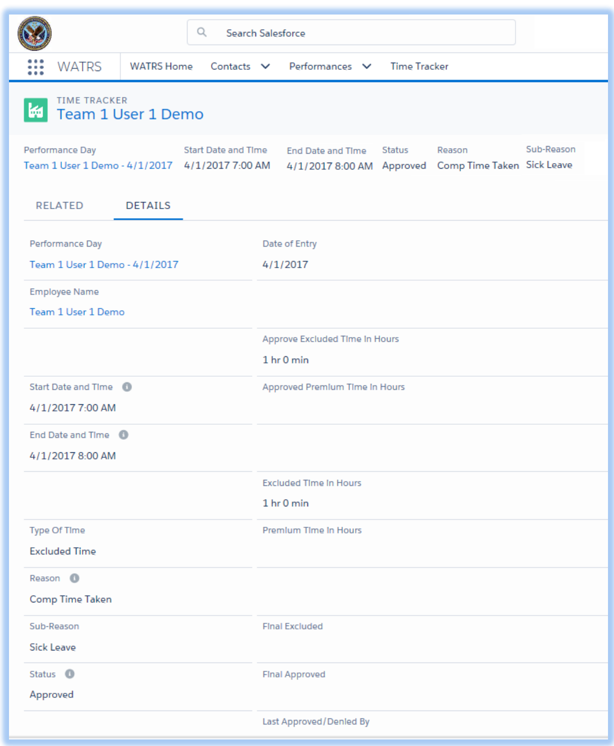
9. To open the time tracker entry, click the excluded time ID link as shown below (see Figure 19).

Figure 19. How to Open a Time Tracker Entry



10. Now the entire time tracker entry may be viewed as shown below (see Figure 20).

Figure 20. Time Tracker Detail Page



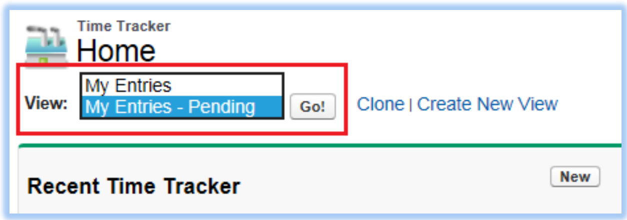
If the time tracker request overlaps another request by date and time, then a duplicate time tracker entry message will appear. Either change the date and time of the time tracker request or edit the existing request that it overlaps instead of creating a new request.

3.1.2 Edit Time Tracker Entry

An employee is able to edit a time tracker entry. To edit an existing time tracker entry, follow the steps below:

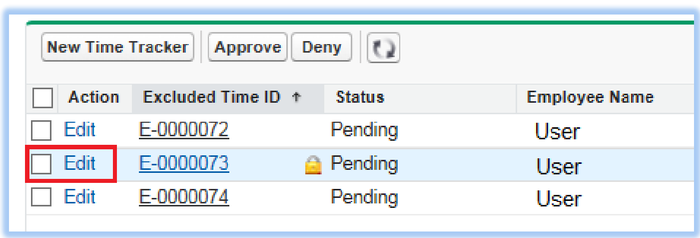
1. Click on “time tracker” on the navigation menu across the top of the page.
2. Click the “view” drop down menu and select “my entries – pending” to edit a time tracker entry that is still in the “pending” status. Then click “go” (see Figure 21).

Figure 21. Employee List View Options



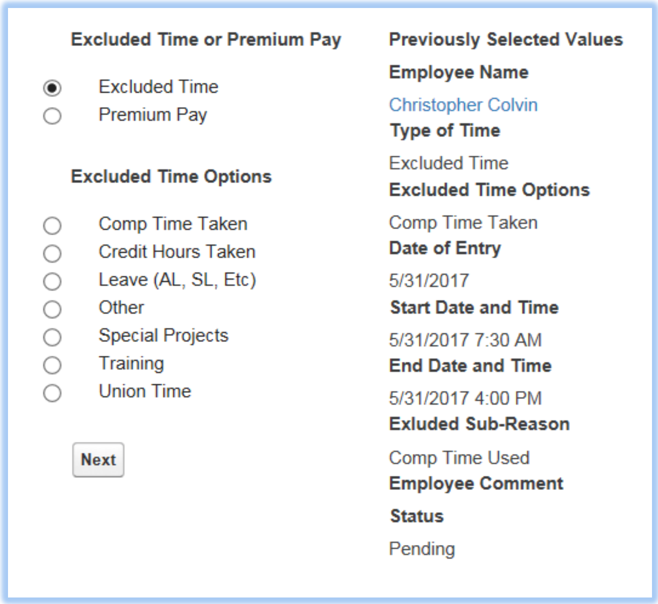
3. Find the time tracker entry that needs editing and click the “edit” link to the left of the record (see Figure 22).

Figure 22. How to Edit a Time Tracker record.



4. A new screen will appear above the list of pending time tracker records (see Figure 23).

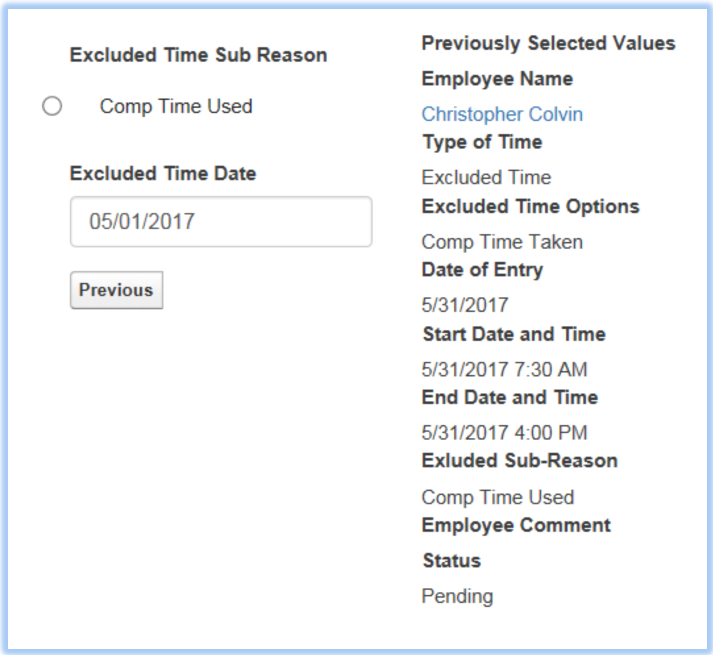
Figure 23. Edit Screen of Time Tracker record



a. The type of time tracker can be changed either “excluded time” or “premium pay”.
b. The subsequent options can be changed as well based on the selection in the previous step.
c. Click the “next” button to continue.

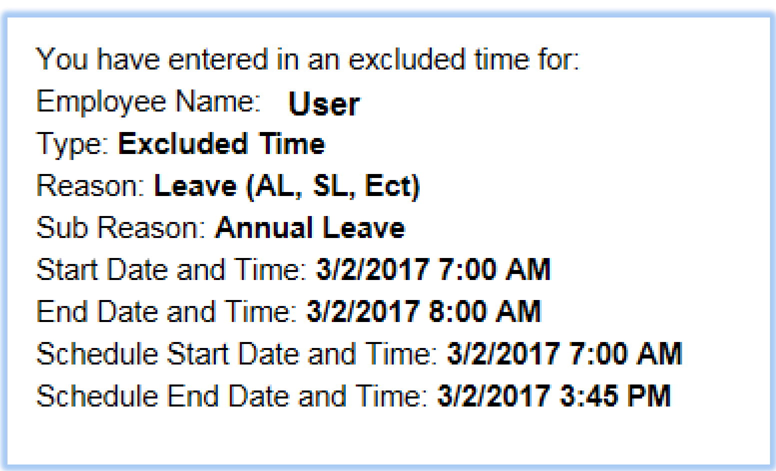
5. On the next screen complete any necessary edits as needed.
    a. Enter the start time and duration in minutes of the “excluded time” or “premium pay”.
    b. Choose a “sub reason” from the drop down menu.
    c. Enter a comment in the “employee comment” field if necessary.
    d. Make changes to the “schedule start time” and “schedule end time” as needed.
    e. When done, click the “next” button to finalize the edits made to the time tracker entry (see Figure 24).

Figure 24. Additional Information Screen for Editing a Time Tracker Entry



6. On the last page, it will display the summary of the edits made (see Figure 25). *Please note that after editing a request you may have to refresh the page to see the changes.*

Figure 25. Time Tracker Success Screen

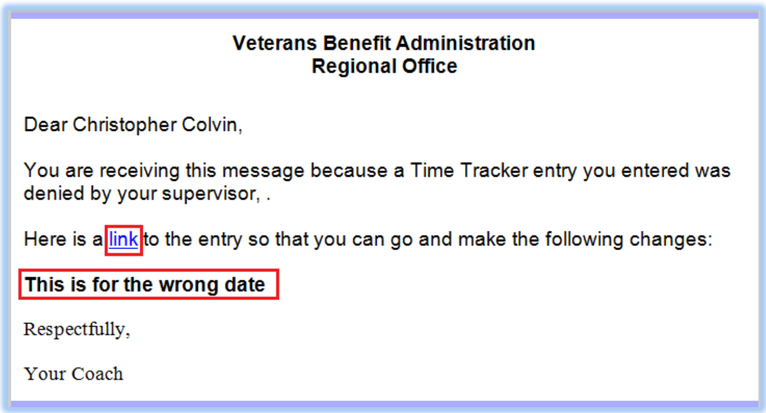


3.1.3 When Time Tracker Entry is Denied

If a time tracker entry is denied, an email will be sent notifying the employee of the denial and reason why it was denied. The email will list the reason why the time tracker entry was denied in bold and contain a link to navigate to the record. If the note indicates that the time tracker entry needs to be corrected follow these steps:

1. In the email click on the link to go to the time tracker entry (see Figure 26).

Figure 26. Time Tracker Denial Notification Email



Veterans Benefit Administration
Regional Office

Dear Christopher Colvin,

You are receiving this message because a Time Tracker entry you entered was denied by your supervisor, .

Here is a link to the entry so that you can go and make the following changes:

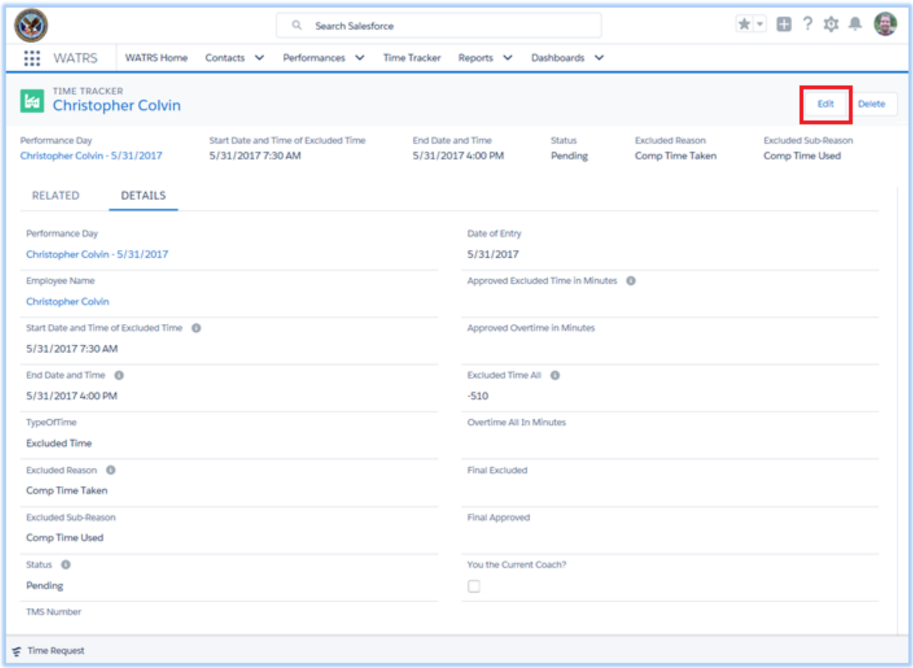
This is for the wrong date

Respectfully,

Your Coach

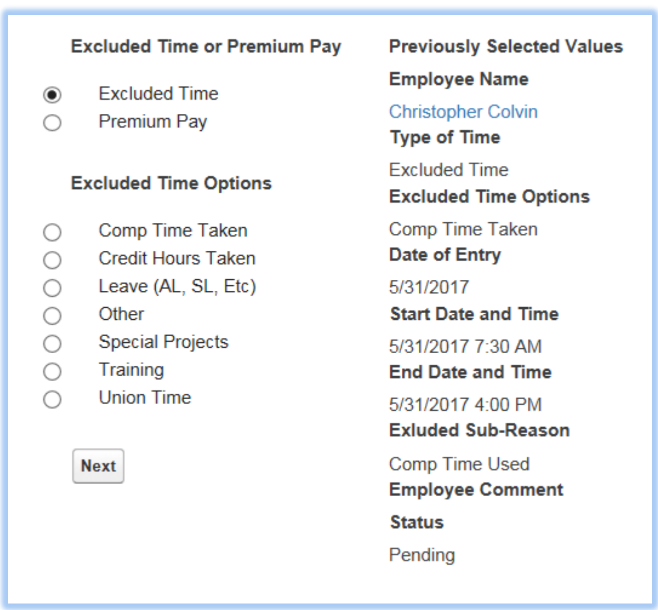
2. In the time tracker entry, click the “edit” button (see Figure 27).

Figure 27. How to Edit a Time Tracker Entry



3. A new screen will appear above the list of pending time tracker records (see Figure 28).

Figure 28. Edit Screen for Time Tracker Entry

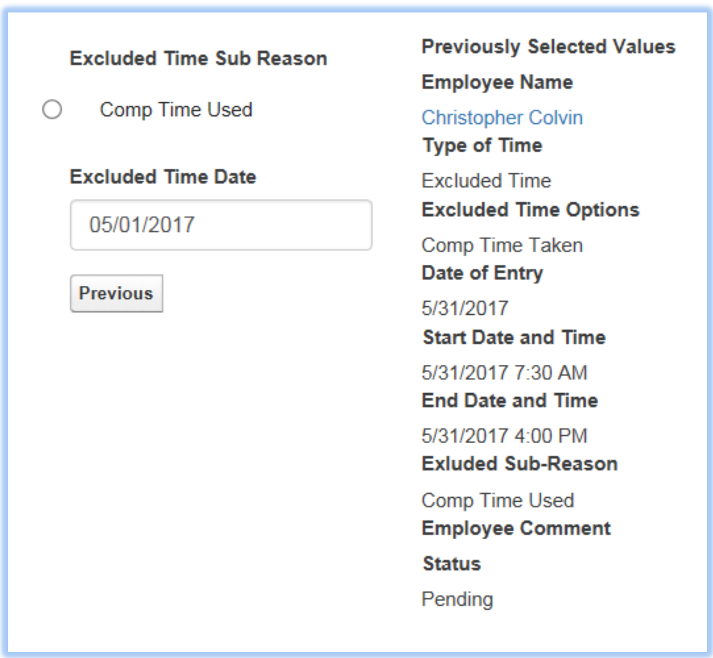


   a. The type of time tracker can be changed either “excluded time” or “premium pay”.

b. The subsequent options can be changed as well based on the selection in the previous step.
c. A new date can be entered or the same date entered again. Please note that a calendar will appear once the "edit date entry" field is clicked on to assist in picking a date.
d. Click the "next" button to continue.

4. On the next screen complete any necessary edits as needed.
    a. Enter the start time and duration in minutes of the "excluded time" or "premium pay".
    b. Choose a "sub reason" from the drop down menu.
    c. Enter a comment in the "employee comment" field if necessary.
    d. Make changes to the "schedule start time" and "schedule end time" as needed.
    e. When done, click the "next" button to finalize the edits made to the time tracker entry (see Figure 29).

Figure 29. Time Tracker Additional Information Screen



5. On the last page, it will display the summary of the edits made (see Figure 30).

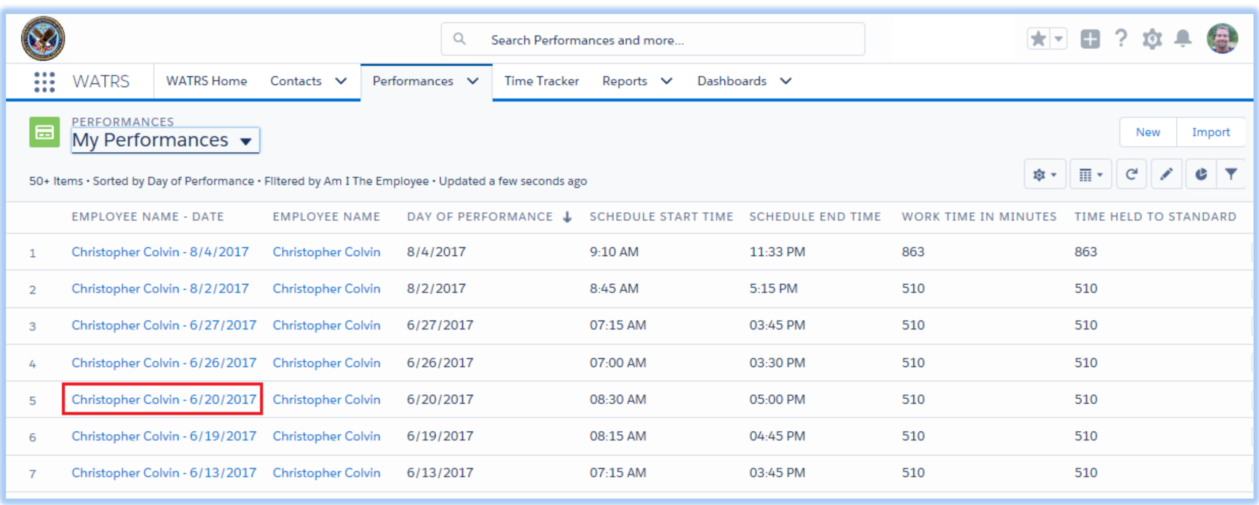
Figure 30. Time Tracker Success Screen

You have entered in an excluded time for:
Employee Name: **User**
Type: **Excluded Time**
Reason: **Leave (AL, SL, Ect)**
Sub Reason: **Annual Leave**
Start Date and Time: **3/2/2017 7:00 AM**
End Date and Time: **3/2/2017 8:00 AM**
Schedule Start Date and Time: **3/2/2017 7:00 AM**
Schedule End Date and Time: **3/2/2017 3:45 PM**

3.2 Employee Performances

The performances tab shows a single record of each day that may contain multiple time tracker related items for an employee. The performance record contains information pertaining to the date of performance, the schedule start and end time for that day, and any excluded time or premium pay, time tracker entries for that day. It also calculates the total time worked and the time held to the standard after any excluded time is factored out
(see Figure 31).

Figure 31. My Performances List View

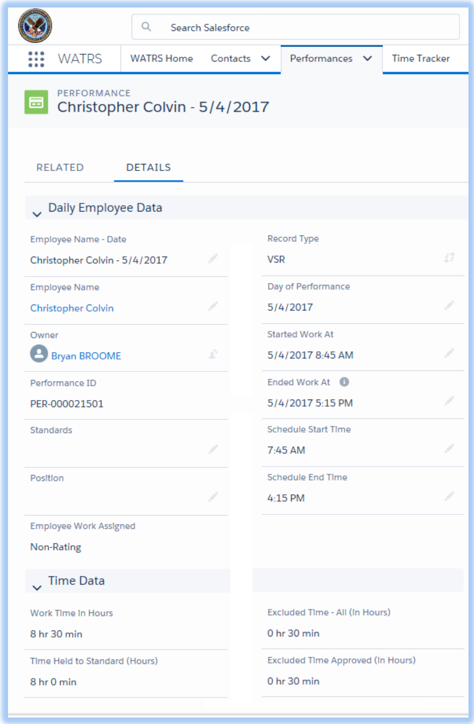


	EMPLOYEE NAME - DATE	EMPLOYEE NAME	DAY OF PERFORMANCE	SCHEDULE START TIME	SCHEDULE END TIME	WORK TIME IN MINUTES	TIME HELD TO STANDARD
1	Christopher Colvin - 8/4/2017	Christopher Colvin	8/4/2017	9:10 AM	11:33 PM	863	863
2	Christopher Colvin - 8/2/2017	Christopher Colvin	8/2/2017	8:45 AM	5:15 PM	510	510
3	Christopher Colvin - 6/27/2017	Christopher Colvin	6/27/2017	07:15 AM	03:45 PM	510	510
4	Christopher Colvin - 6/26/2017	Christopher Colvin	6/26/2017	07:00 AM	03:30 PM	510	510
5	Christopher Colvin - 6/20/2017	Christopher Colvin	6/20/2017	08:30 AM	05:00 PM	510	510
6	Christopher Colvin - 6/19/2017	Christopher Colvin	6/19/2017	08:15 AM	04:45 PM	510	510
7	Christopher Colvin - 6/13/2017	Christopher Colvin	6/13/2017	07:15 AM	03:45 PM	510	510

Figure 31 shows the “my performances” list view.

Click the link in the “employee name – date” column for a record to view more details about a record. This will open the full detail page of the performance record (see Figure 32).

Figure 32. My Performances Detail Page

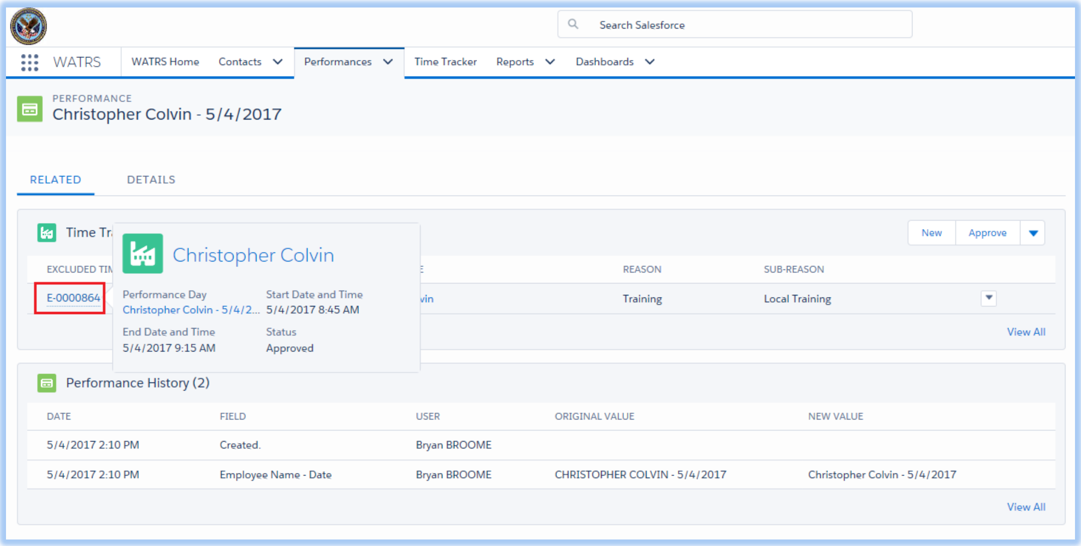


The following is a summary of the information contained in the performance record detail page.

1. Employee Name
2. Standards – Standard to which the employee is accountable.
3. Position – Position of the employee, for example: VSR, RVSR, etc.
4. Employee Work Assigned – Type of work to which the employee is assigned, for example: Non-Rating, Rating and Appeals.
5. Schedule Start and End Times – Tour of duty for the employee for that day.
6. Work time in Hours – Total number of hours worked for that day.
7. Time held to Standard – Time for which the employee is accountable for work after any excluded time is considered.

The “related” tab on the performance record detail page shows all the time tracker entries for that day (see Figure 33).

Figure 33. Related tab



The time tracker entry can be accessed from the related tab by clicking on the excluded time ID value. By moving the cursor over the excluded time ID, additional high level details will display in a pop-up box.

3.3 Employee Contacts

The contacts record shows information about the employee. To access the contact record, click the name of the employee from the left column. The contacts record shows information about the employee including email address, phone number, regional office, division, position, schedule start and end times, and emergency point of contact information. Please ensure that the information contained in the contacts records is correct and up to date. If the information in the contact record is not correct, then one will have to make the corrections to the data sources, which are WIT and VATAS; updates are feed to WATRS bi-weekly (usually on a Monday).

4.0 Supervisor Instructions

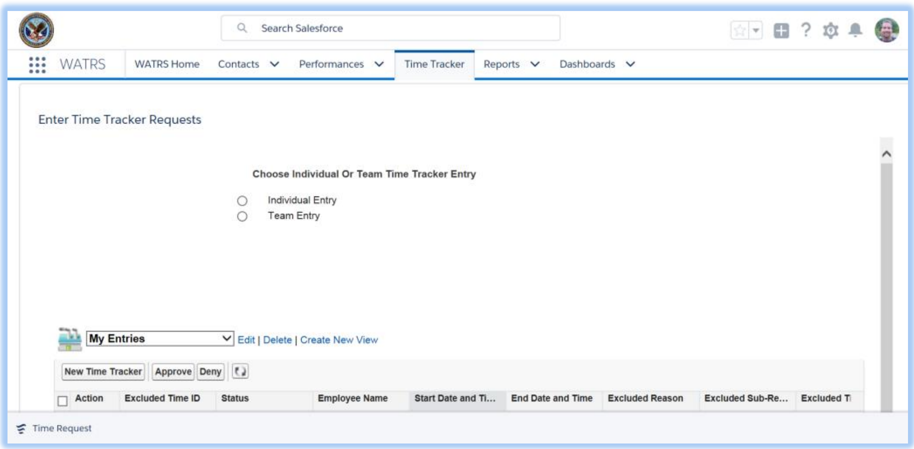
4.1 Supervisor Time Tracker Overview

4.1.1 How to Enter a Time Tracker Entry on Behalf of an Employee

To create a new time tracker entry, follow these steps:

1. Click on the "time tracker" tab from the navigation bar (see Figure 34).

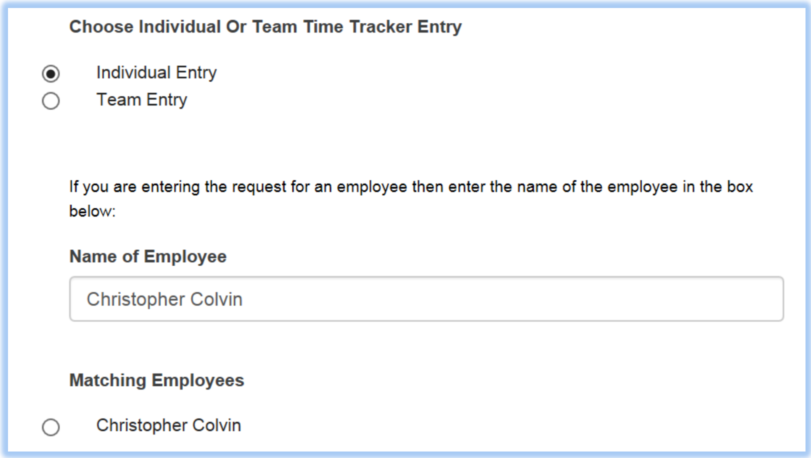
Figure 34. Time Tracker Layout



2. Select either "individual entry" or "team entry". "Team entry" allows one to make an entry for multiple employees in a list for a team or division.

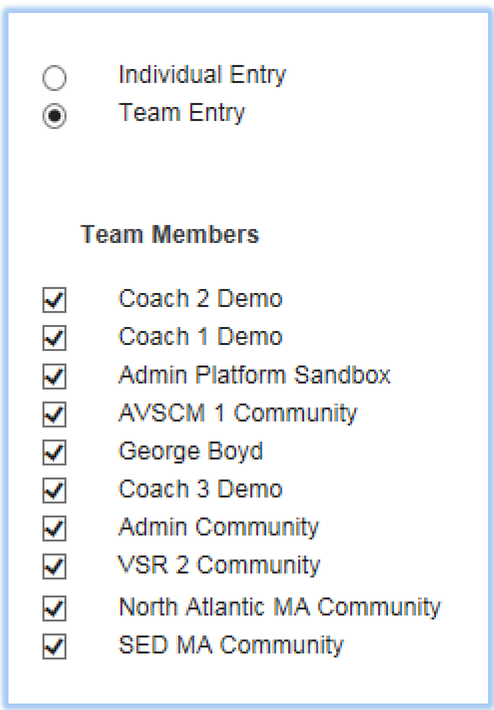
3. Type the name of the employee for which the time tracker entry is being created. The format for the name is first name a "space" and then last name. Also, entering just the first or last name will populate those employees with that first or last name. After the name is entered, press the enter key on the keyboard and WATRS will search for matching employees. Of the results displayed, click the radio button next to the employee for whom the entry is being created (see Figure 35).

Figure 35. Entering the Name of the Employee



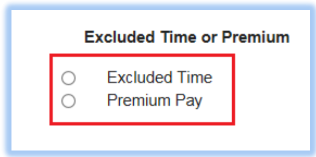
4. To enter the same time tracker entry for multiple employees at once, select the "team entry" option and select the employees on the team that need a time tracker record (see Figure 36).

Figure 36. Team Entry



5. Additional selections will appear. Select either “excluded time” or “premium pay” (see Figure 37).

Figure 37. Type of Time Tracker Entry



6. More options will appear below once “excluded time” or “premium pay” is selected. To continue select an option from the new items that appear (see Figures 38a and 38b).

Figure 38a. Excluded Time Reasons

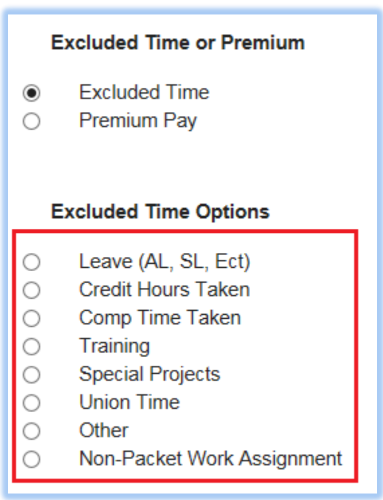
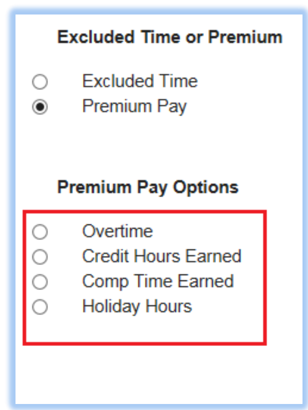
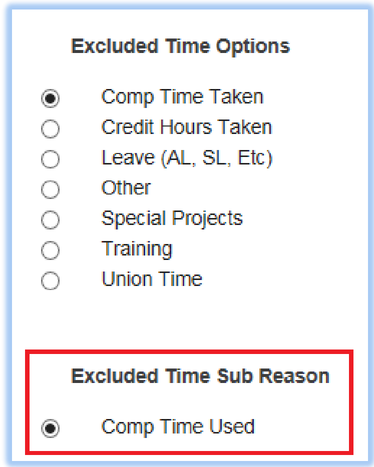


Figure 38a. Excluded Time Reasons



7. Select a sub reason (see Figure 39).

Figure 39. Sub Reason

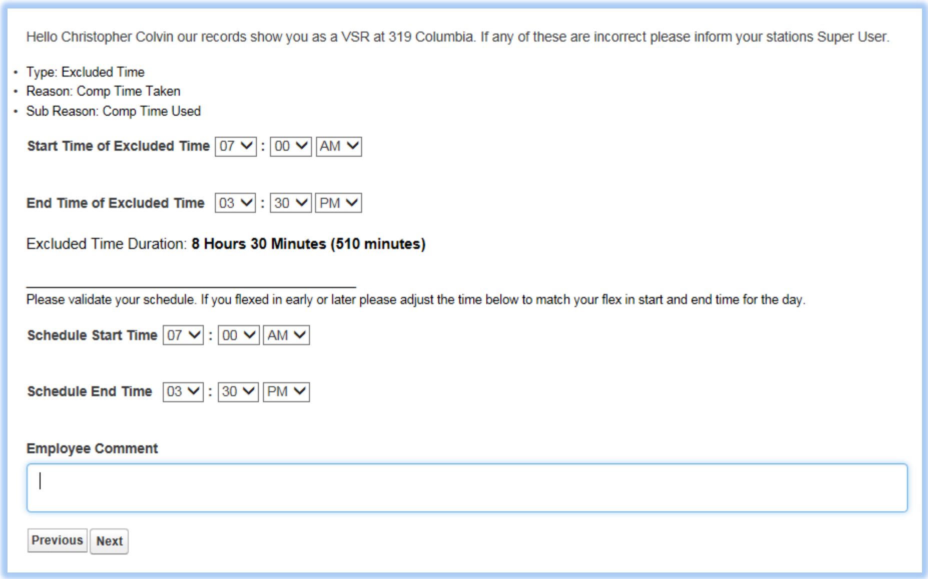


8. When a “sub reason” is selected enter a “start” and “end date”. Please note that a calendar drop down window will appear to assist in picking a date (see Figure 40).

Figure 40. Date Entry for Time Tracker Entry

9. After a date is entered select the [Next] button and a new page will open and requesting additional information that needs to be entered (see Figure 41).

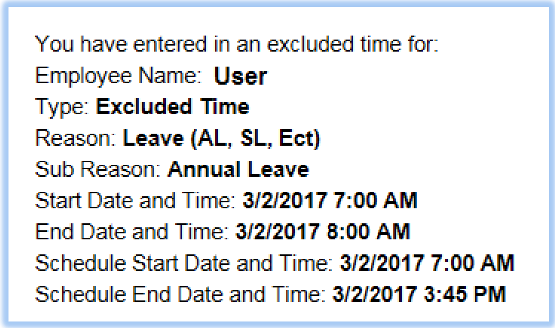
Figure 41. Additional Information Screen for Time Tracker Entry



a. Enter the “start” time.
b. Enter the “end” time.
c. The last two fields refer to the start and end times of an employee’s schedule. These fields will be prepopulated with the employee’s core time (as listed in VATAS); however, if the employee has a “flex schedule” and has started working earlier or later than their core time, then they should update these last two fields to indicate the actual time work was started and ended for the day.
d. Enter any comments in the employee comment field.
e. Finally, click the next button at the bottom to create the time tracker entry.

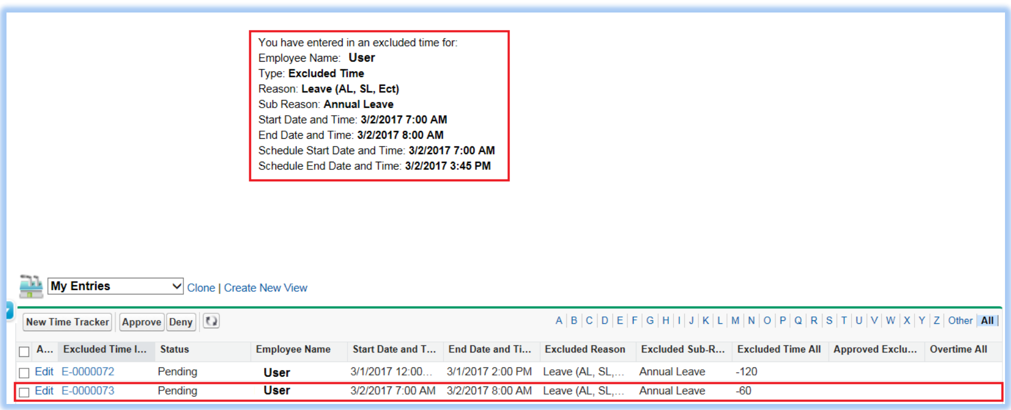
Once the time tracker entry is created, a summary page screen will display (see Figure 42).

Figure 42. Summary Screen



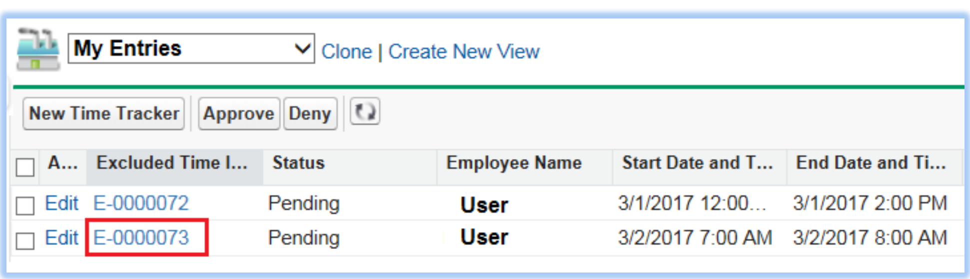
10. To view the time tracker entry that was just created, scroll to the bottom and look for the record that matches what was entered. Note that the record that was just created is showing a status of "pending". When the supervisor approves the time tracker entry, the status will change to "approved" (see Figure 43).

Figure 43. Summary Screen and Time Tracker List View



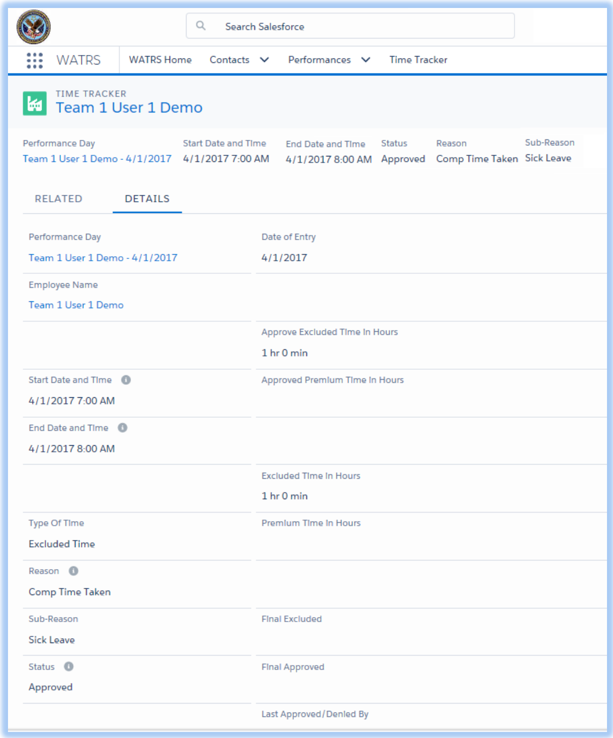
11. To open the time tracker entry, click the excluded time ID link as shown below (see Figure 44).

Figure 44. How to Open a Time Tracker Entry



12. Now the entire time tracker entry may be viewed as shown below (see Figure 45).

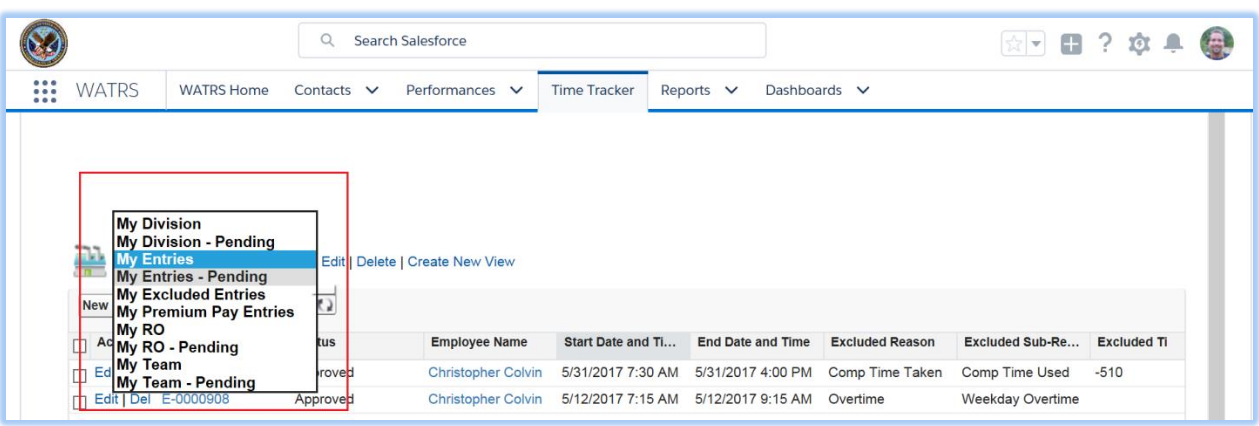
Figure 45. Time Tracker Detail Page



4.1.2 Time Tracker List Views

The supervisor is able to see time tracker entries by different views (see Figure 46). These views are:

Figure 46. Time Tracker Supervisory List View Options



- My Division – Time tracker entries for the division of the supervisor.

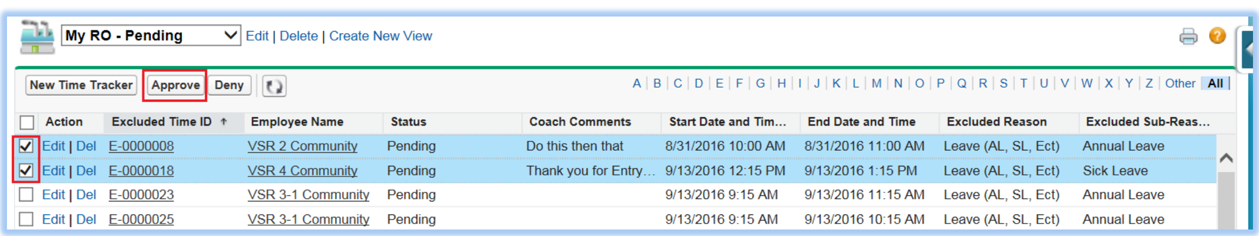
- My Division – Pending –Time tracker entries for the division of the supervisor where the “status” is set to pending.
- My Entries –Time tracker entries for the supervisor.
- My Entries – Pending –Time tracker entries for the supervisor where the “status” is set to pending.
- My RO –Time tracker entries for the regional office of the supervisor.
- My RO – Pending –Time tracker entries for the regional office of the supervisor where the “status” is set to pending.
- My Team – Time tracker entries for the team of the supervisor.
- My Team – Pending –Time tracker entries for the team of the supervisor where the “status” is set to pending.

4.1.3 How to Approve and Deny Time Tracker Entries

A supervisor may approve or deny time tracker entries. To see your team's pending time tracker entries, select the "my team - pending" list view option. To approve or deny time tracker entries for employees on another supervisor’s team, select the “my division – pending” list view and click go to see the pending entries for the division.

To approve a time tracker entry (see Figure 47), follow these steps:

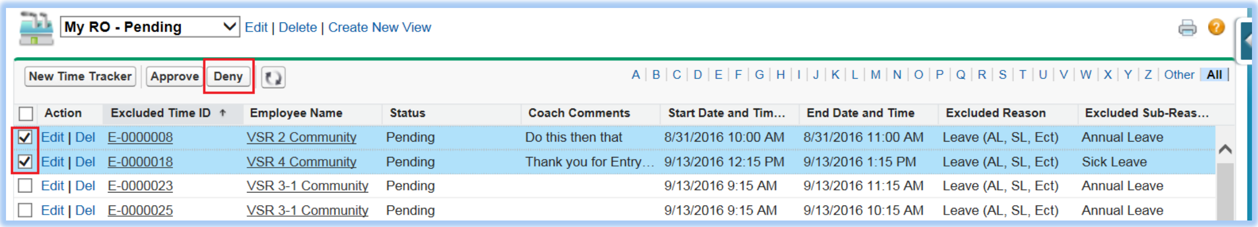
Figure 47. Approve Time Tracker Entries



1. Click the checkbox next to the entry that needs to be approved.
2. Click the “approve” button at the top of the list.
3. If list view is set to “my team – pending” or “my division – pending”, then the entries that were approved will no longer appear. Those entries will appear in the “my team” or “my division” list view as they are no longer pending.

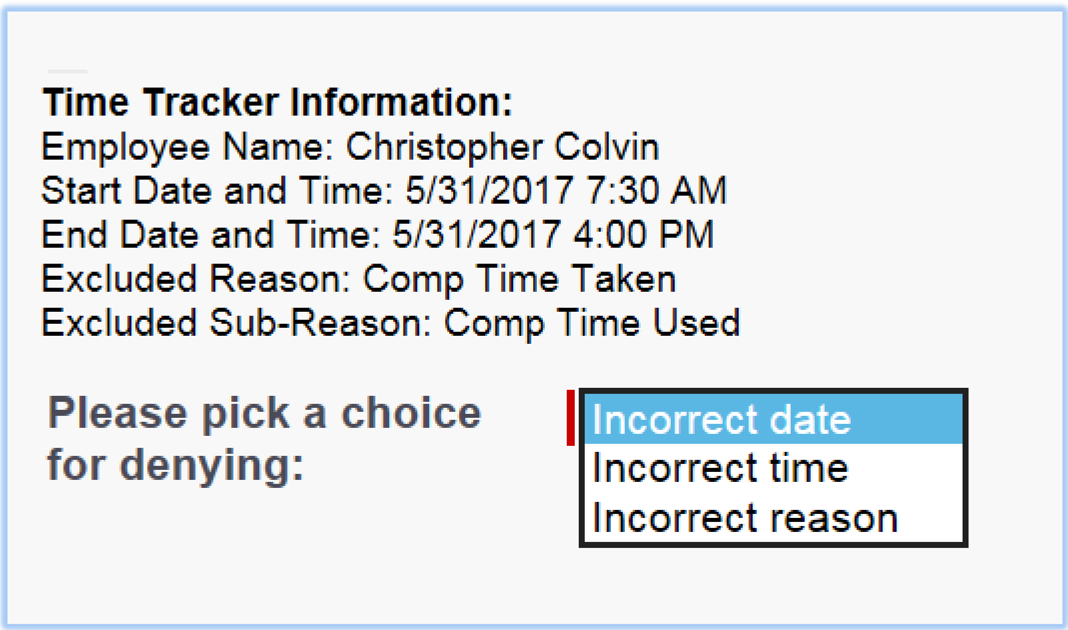
To deny a time tracker entry (see Figure 48), follow these steps:

Figure 48. Deny Time Tracker Entries



1. Click the checkbox next to the entry that needs to be denied.
2. Click the “deny” button at the top of the list.
3. For each entry that is denied, a reason must be entered as shown below. Once a comment is entered, click the next button to proceed to the next entry to enter a comment for each entry (see Figure 49).

Figure 49. Denial Reason Entry



4. If list view is set to “my team – pending” or “my division – pending”, then the entries that were denied will no longer appear. Those entries will appear in the “my team” or “my division” list views.
5. The employee will receive an email notifying them that the entry was denied along with the comment. If applicable, once the entry is corrected, the status of the entry will be set back to pending and will be visible again in the “pending” list views.

4.2 Supervisor Performances

Performances for employees can be viewed as a supervisor in the performances tab. By changing the list view to "my team" the supervisor can see all performances for his or her team.

4.3 Supervisor Contacts

The supervisor can view all employees on his or her team by selecting the "my team" list view option. To access the contact record, click the name of the employee from the left column. The contacts record shows information about the employee including email address, phone number, regional office, division, position, schedule start and end times, and emergency point of contact information. Please ensure that the information contained in the contacts records is correct and up to date.

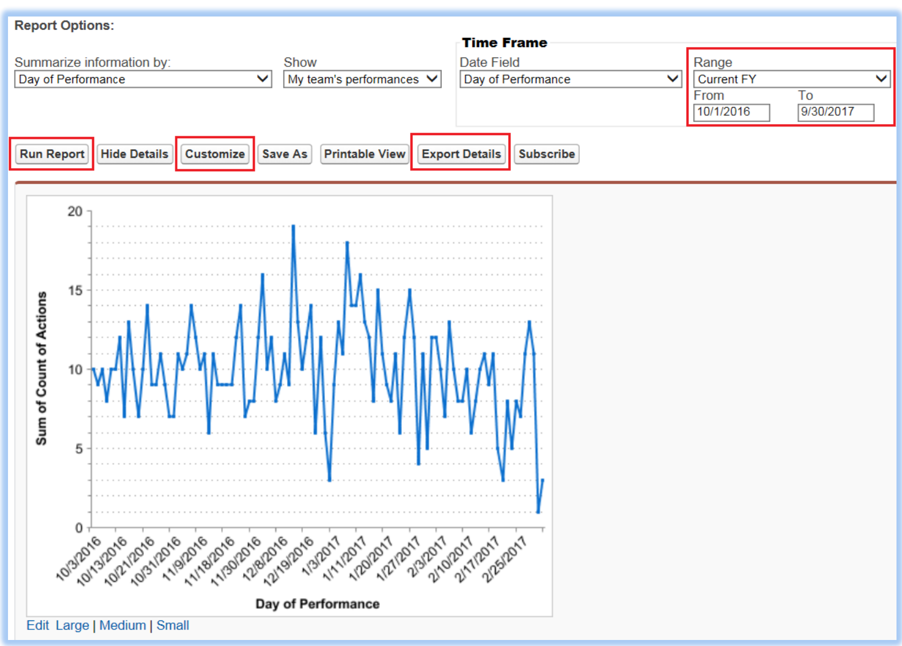
4.4 Supervisor Dashboard Overview

The Dashboard for the supervisor is set up to view all employees' data on the logged in supervisor's team. The dashboard contains all of the same charts as the employee's version of the dashboard. Clicking on one of the charts will allow the supervisor to go the report.

To filter the report to a specific employee these steps should be followed:

1. Click the "dashboards" tab at the top in the navigation bar.
2. Once the dashboard displays, click one of the charts for which a filter will be applied.
3. Once the report loads there will additional options, to add filters, customize, or export the report (see Figure 50).

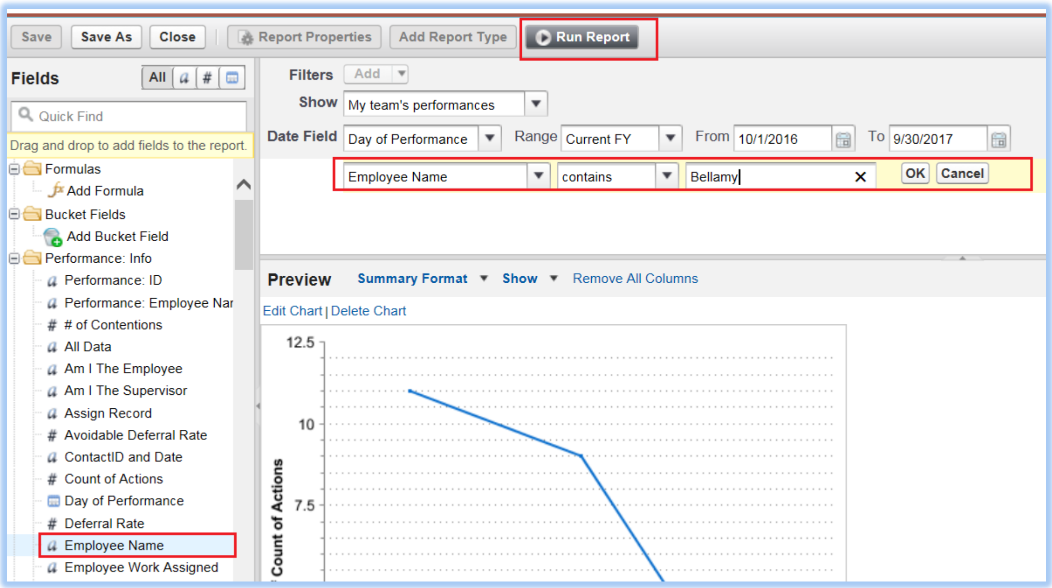
Figure 50. Supervisory Report Detail Page



4. The chart in the example above is "performance by day for the fiscal year".

a. The default date range is the current fiscal year; however it can be modified for a specific date range. Once a specific date range is entered, the "run report" button will need to be clicked in order to show the results.
b. To customize the report, to show only one employee on the supervisor's team, click the "customize" button.
c. This will load the edit report page (see Figure 51).

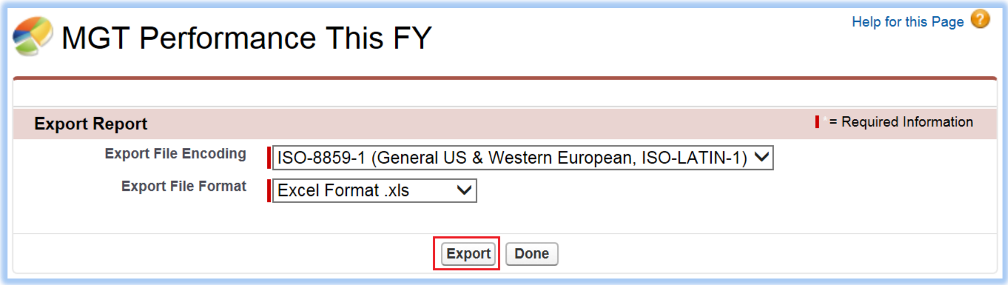
Figure 51. Supervisory Report Customization Page



i. To add a filter, to show a specific employee, look on the left panel for the field called "employee name". Click and drag this field over to the filters section until a green check mark appears on the field that is being dragged over.
ii. When the field is added as a filter, change the rule type to "contains" if entering the last name or part of the name of the employee. Or use the "equals" rule if entering the exact name of the employee.
iii. If the rule type or part of the name is using the "contains" rule type, then click the "OK" button.
iv. Once the "OK" button is clicked the report and chart will refresh to display the results (based on the new filter).

d. To Export the report, click the "export details" button (see Figure 52).

Figure 52. Report Export Page



e. Click the “export” button.
f. Click the “save” or “open” button in the yellow popup at the bottom to view the report in Excel (see Figure 53).

Figure 53. Export View Options

5.0 Point of Contact

For questions regarding the WATRS App, please use the following email address: RDT.VBAVACO@va.gov