eUMB Electronic Timesheets

Supervisors – Timesheet Processing

Created on Monday, March 22, 2010

COPYRIGHT & TRADEMARKS

Copyright © 2003, 2007, Oracle. All rights reserved. Powered by OnDemand Software. Distributed by Oracle under license from Global Knowledge Software LLC. © 1998-2007. All rights reserved.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If this documentation is delivered to the United States Government or anyone using the documentation on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS
The U.S. Government's rights to use, modify, reproduce, release, perform, display, or disclose these training materials are restricted by the terms of the applicable Oracle license agreement and/or the applicable U.S. Government contract.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Table of Contents

eUMB Electronic Timesheets 1

Supervisors 1
Timesheet Processing (030310) 1
Exercise 1 - Accessing and Approving Timesheets 11
Exercise 2 – Entering time for an employee 19

eUMB Electronic Timesheets

Supervisors

Timesheet Processing (030310)

This topic covers **Timesheet Processing for Supervisors (Approving and Entering)**. Starting with the pay period with the date range of *March 28 - April 10, 2010*, electronic timesheets will be entered and approved using the eUMB electronic timesheet process for exempt employees. For supervisors, this means that once employees submit their time, it will automatically be routed to the supervisor for approval, then once approved by the supervisor, will be routed to the T&L Initiator (the department payroll representative) for the next level of approval. Supervisors also have the ability to enter time for their employees.

Obviously, timesheet approval is an important step in the process. Timely approval of your employees' timesheets is critical. The approved electronic timesheet is the *official document* of hours worked and leave taken. If the approval is not done, then there will be no document of hours worked and leave taken.

Procedure

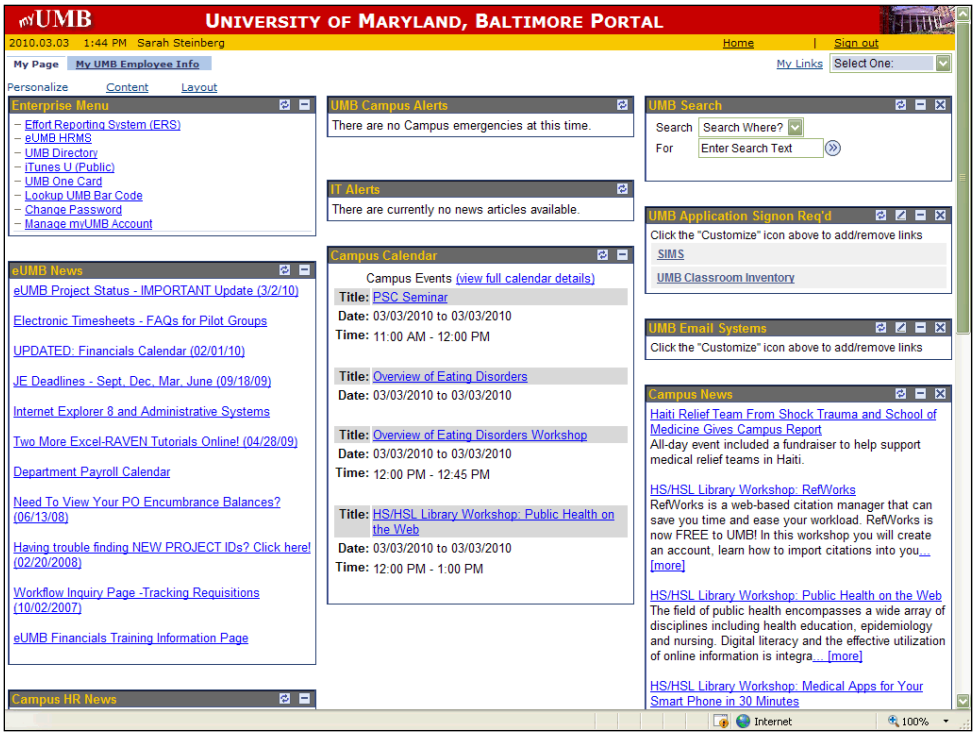
This topic introduces you to processing employee timesheets, which means approving timesheets and entering timesheets for employees when necessary.

This includes an overview of the process, how to access the approval page, how to approve time, how to make corrections, and how to recycle a timesheet to an employee for corrections. We will walk through a number of scenarios to learn about the approval process. We will then walk through the steps to enter a timesheet for an employee when they are unable to do so themselves.

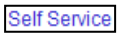
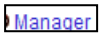
***** IMPORTANT ***** This is one of **two** topics that Supervisors need to take in order to understand all aspects of the Electronic Timesheet process. The suggested order for review and completion is:

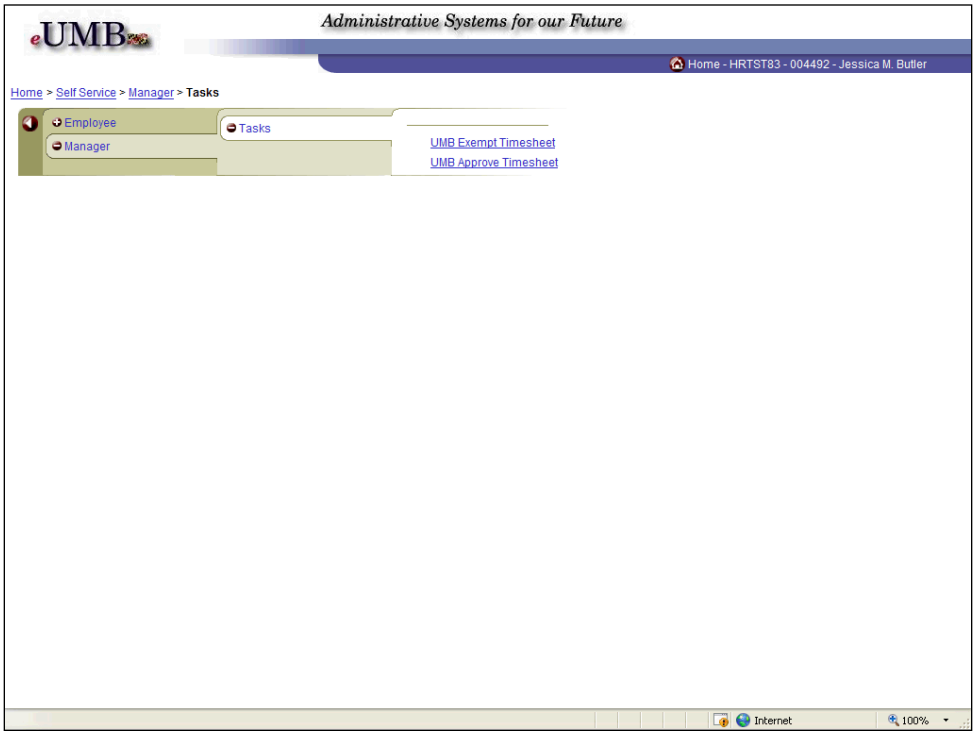
1 - Electronic Timesheets (under the Exempt Employees folder)
2 - Timesheet Processing (this topic)

Step	Action
1.	**Approving Timesheets for Exempt Employees** As timesheets for exempt employees are done on-line via eUMB, a few advantages include: • Automatically routed to the supervisor and then the T&L Initiator. • Can be done from any computer with an internet connection. • Supervisors receive daily E-mail notifications when there are timesheets to approve. You do not have to wait to receive the e-mail, though. If you know employees have submitted their timesheet, you can go and approve them.

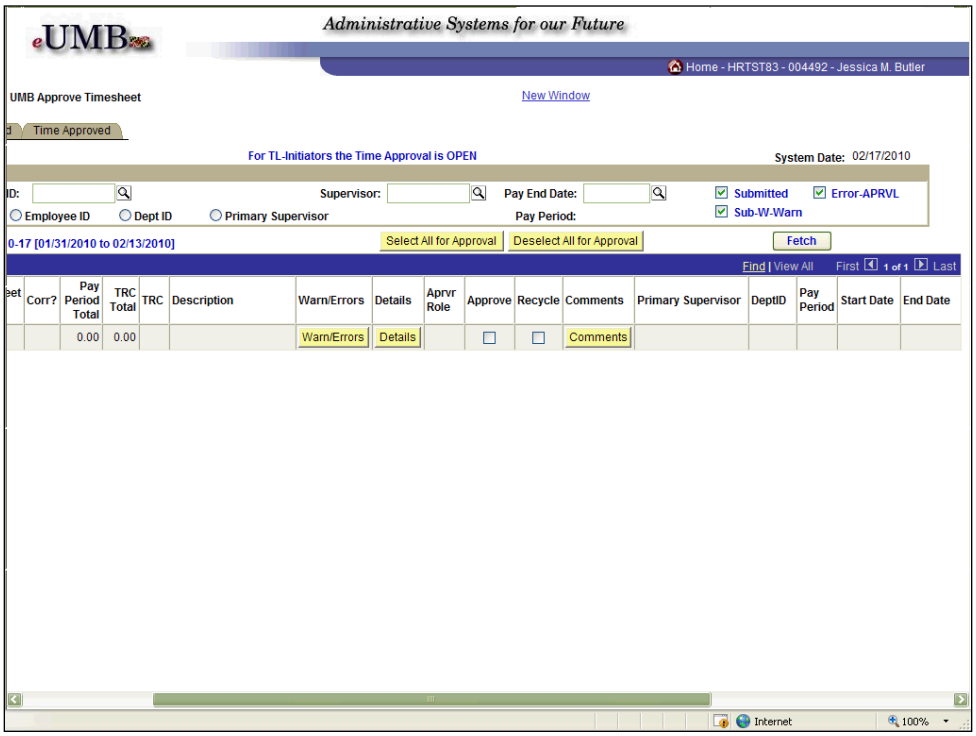


Step	Action
2.	To approve timesheets, you will have to acces the eUMB Portal. Once you sign into the eUMB Portal, in the **Enterprise Menu** box, click the **eUMB HRMS** link. eUMB HRMS

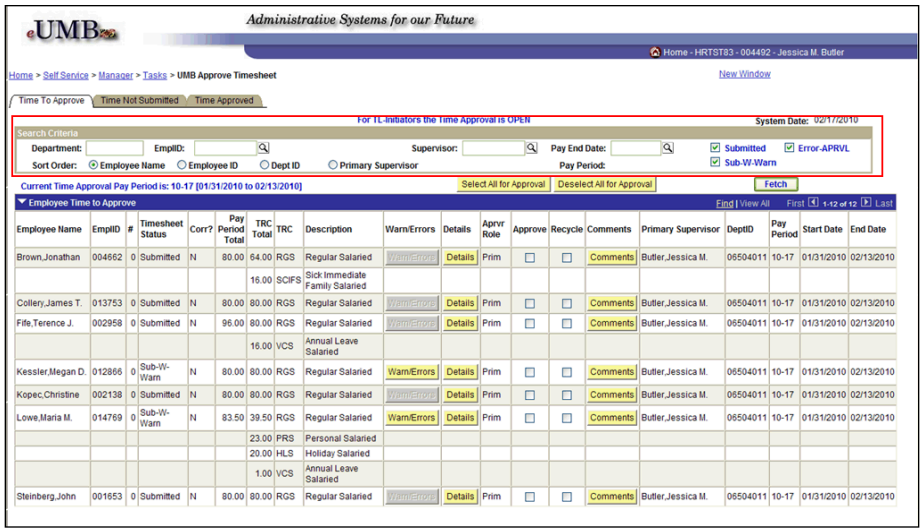
Step	Action
3.	This is the **eUMB HRMS** home page. You will use the menu to navigate to the **Approve Timesheet** page. As you make each selection, submenus will open and a breadcrumb trail will appear in order to help you navigate more easily. Click the **Self Service** link. 
4.	Click the **Manager** link. 
5.	Click the **Tasks** link.



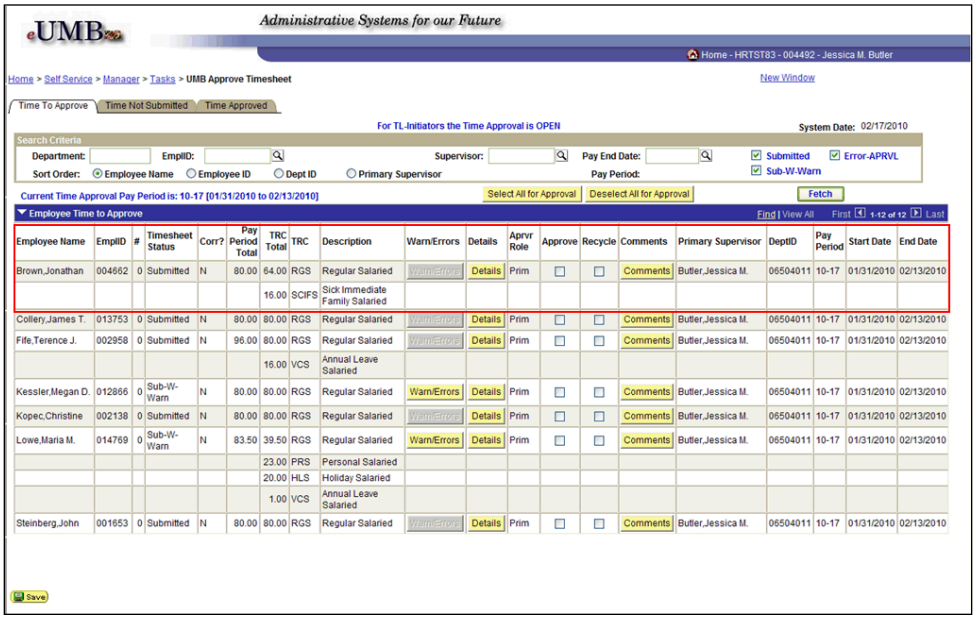
Step	Action
6.	You will notice that the breadcrumb trail now appears above the menu. This creates an easy way to go back to a previous menu if necessary. Also, you can access and enter your timesheet from this page by clicking on **UMB Exempt Timesheet**. Click the **UMB Approve Timesheet** link. UMB Approve Timesheet
7.	This is the **UMB Approve Timesheet** page. There are three tabs at the top of the screen that relate to approving timesheets: Time to Approve, Time Not Submitted, and Time Approved. We will review each of these tabs in more detail in a moment. **Scroll** to the right.



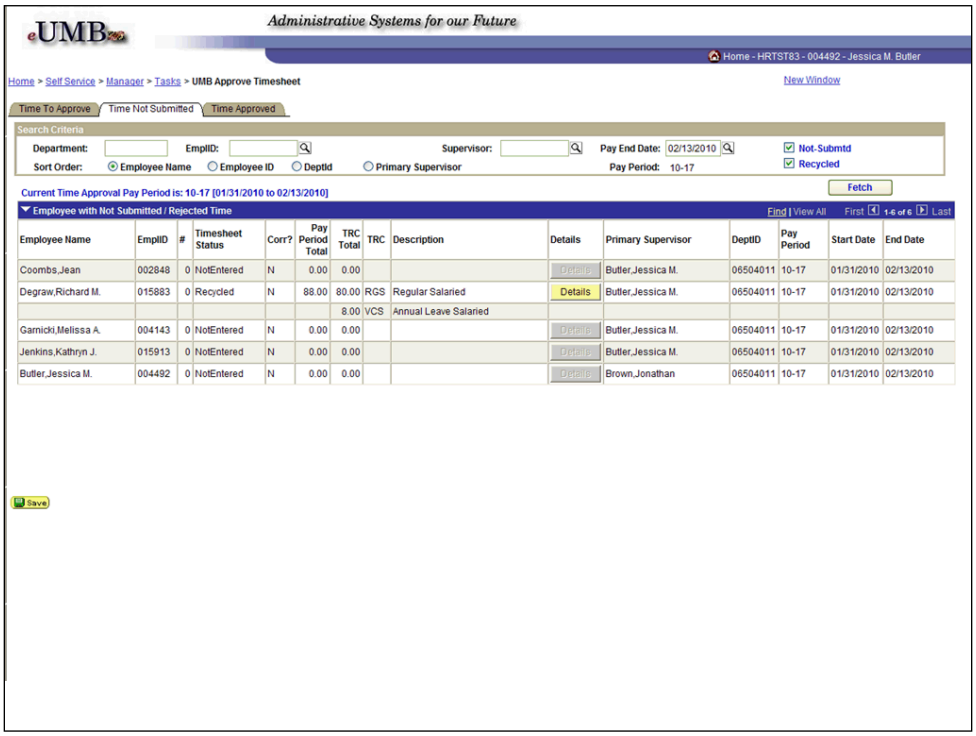
Step	Action
8.	To pull up the employees whose timesheets you are responsible for reviewing and approving, click the **Fetch** button.
9.	Now that we have our search results, we're going to look at a few screenshots of this page in order to explain how the page is set up.


eUMB
Administrative Systems for our Future
Home - HRTST83 - 004492 - Jessica M. Butler
Home > Self Service > Manager > Tasks > UMB Approve Timesheet
New Window
Time To Approve
Time Not Submitted
Time Approved
For TL-Initiators the Time Approval is OPEN
System Date: 02/17/2010
Search Criteria
Department:
EmplID:
Supervisor:
Pay End Date:
Submitted
Error-APRVL
Sub-W-Warn
Sort Order: Employee Name Employee ID Dept ID Primary Supervisor
Pay Period:
Current Time Approval Pay Period is: 10-17 (01/31/2010 to 02/13/2010)
Select All for Approval
Deselect All for Approval
Fetch
Employee Time to Approve
Find | View All
First 1-12 of 12 Last
Employee Name | EmplID | # | Timesheet Status | Corr? | Pay Period Total | TRC Total | TRC | Description | Warn/Errors | Details | Aprvr Role | Approve | Recycle | Comments | Primary Supervisor | DeptID | Pay Period | Start Date | End Date
Brown,Jonathan | 004662 | 0 | Submitted | N | 80.00 | 64.00 | RGS | Regular Salaried | Warn/Errors | Details | Prim | Comments | Butler,Jessica M. | 06504011 | 10-17 | 01/31/2010 | 02/13/2010
16.00 | SCIFS | Sick Immediate Family Salaried
Collery,James T. | 013753 | 0 | Submitted | N | 80.00 | 80.00 | RGS | Regular Salaried | Warn/Errors | Details | Prim | Comments | Butler,Jessica M. | 06504011 | 10-17 | 01/31/2010 | 02/13/2010
Fife,Terence J. | 002958 | 0 | Submitted | N | 96.00 | 80.00 | RGS | Regular Salaried | Warn/Errors | Details | Prim | Comments | Butler,Jessica M. | 06504011 | 10-17 | 01/31/2010 | 02/13/2010
16.00 | VCS | Annual Leave Salaried
Kessler,Megan D. | 012866 | 0 | Sub-W-Warn | N | 80.00 | 80.00 | RGS | Regular Salaried | Warn/Errors | Details | Prim | Comments | Butler,Jessica M. | 06504011 | 10-17 | 01/31/2010 | 02/13/2010
Kopec,Christine | 002138 | 0 | Submitted | N | 80.00 | 80.00 | RGS | Regular Salaried | Warn/Errors | Details | Prim | Comments | Butler,Jessica M. | 06504011 | 10-17 | 01/31/2010 | 02/13/2010
Lowe,Maria M. | 014769 | 0 | Sub-W-Warn | N | 83.50 | 39.50 | RGS | Regular Salaried | Warn/Errors | Details | Prim | Comments | Butler,Jessica M. | 06504011 | 10-17 | 01/31/2010 | 02/13/2010
23.00 | PRS | Personal Salaried
20.00 | HLS | Holiday Salaried
1.00 | VCS | Annual Leave Salaried
Steinberg,John | 001653 | 0 | Submitted | N | 80.00 | 80.00 | RGS | Regular Salaried | Warn/Errors | Details | Prim | Comments | Butler,Jessica M. | 06504011 | 10-17 | 01/31/2010 | 02/13/2010

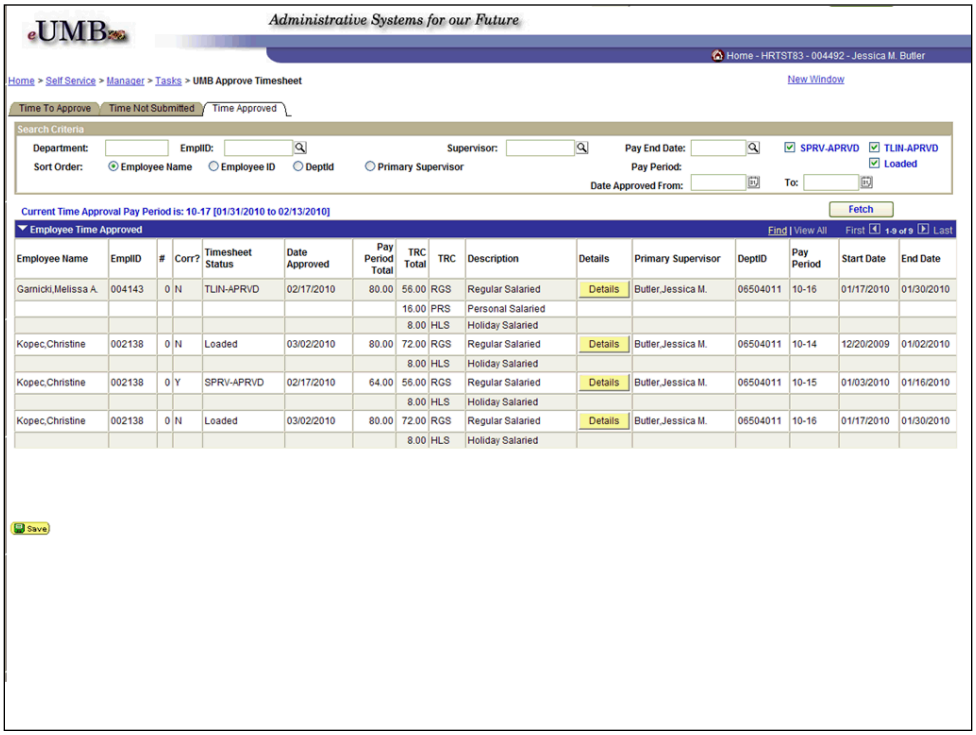
Step	Action
10.	We are presently looking at the **Time To Approve** tab on the Approve Timesheet page. Above the Search Criteria box, you will see a notification for T&L Initiators stating if the approval feature is open or closed. This does NOT apply to you. Supervisors always have the ability to approve. **Search Criteria** – This section allows you to search for timesheets based on a number of factors. Department – Useful if you cover more than one department and only want to look at one at a time. EmplID – Allows you to retrieve one employee's timesheet at a time. Supervisor – You can pull up all employees assigned to a specific supervisor. Pay End Date – This field will accept the date in a number of different formats, such as 032710, 3/27/2010, 03-27-10, or 3-27-2010. The system will only accept the end date of a pay period. If you enter any other date, the system will not accept it. You can click on the Search icon to look for the end date of a specific pay period. Checkboxes – As a supervisor, you will be able to view timesheets with these three statuses. All three are selected by default. • *Submitted* - The employee submitted his/her time and there were no warnings • *Sub-W-Warn* - The employee submitted his/her time with warnings • *Error-APRVL* - This is an "approval error." If an employee submits more than one timesheet with leave recorded, and if the cumulative total of the leave reported in any category on these timesheets would cause the employee's leave balance to go into the negative, this error will be returned. This error will only appear for T&L Initiators. Sort Order – You can choose the order in which you retrieve the timesheets. Select All for Approval/ Deselect All for Approval – a quick way to select or deselect all employees' timesheets for approval. Fetch - Will retrieve the applicable timesheets based on the search criteria. For informational purposes the current approval pay period ID and dates always appears under the Search Criteria box.



Step	Action
11.	Once the Fetch button is selected, the search results will appear. Let's take a moment to review the columns: • **Employee Name** through **# –** the employee's identifying information as recorded in eUMB • **Status** – the status for each timesheet • **Corr?** – If a "Y" appears, this timesheet is correcting a previously submitted timesheet. • **Pay Period Total** – the total of hours being submitted for the pay period • **TRC Total** – the total hours broken down based on Time Reporting Code (TRC) codes • **TRC** – the Time Reporting Code • **Description** – explanation of the Time Reporting Code • **Warn/Errors** – If the button is active, there are possible issues with the timesheet. This will be discussed in more detail later. • **Details** – allows you to view the employee's timesheet • **Aprvr Role** – What your role is. You should see "Prim" if you are the Primary Supervisor or "Alt1" or "Alt2" if you are an alternate supervisor. • **Approve** – checkbox allowing you to approve a timesheet • **Recycle** – checkbox allowing you to recycle a timesheet. You will use this if there is a problem with the timesheet that you need the employee to fix. • **Comments** – If you are recycling a timesheet, you will explain why using this button. • **Primary Supervisor** - of the employee in question • **DeptID** - the department in which the employee works • **Pay Run ID** – This may be helpful if an employee has submitted more than one timesheet (e.g., if he or she was on vacation and missed the last pay period). • **Start Date** – of the pay period • **End Date** – of the pay period Let's now look at the **Time Not Submitted** tab.

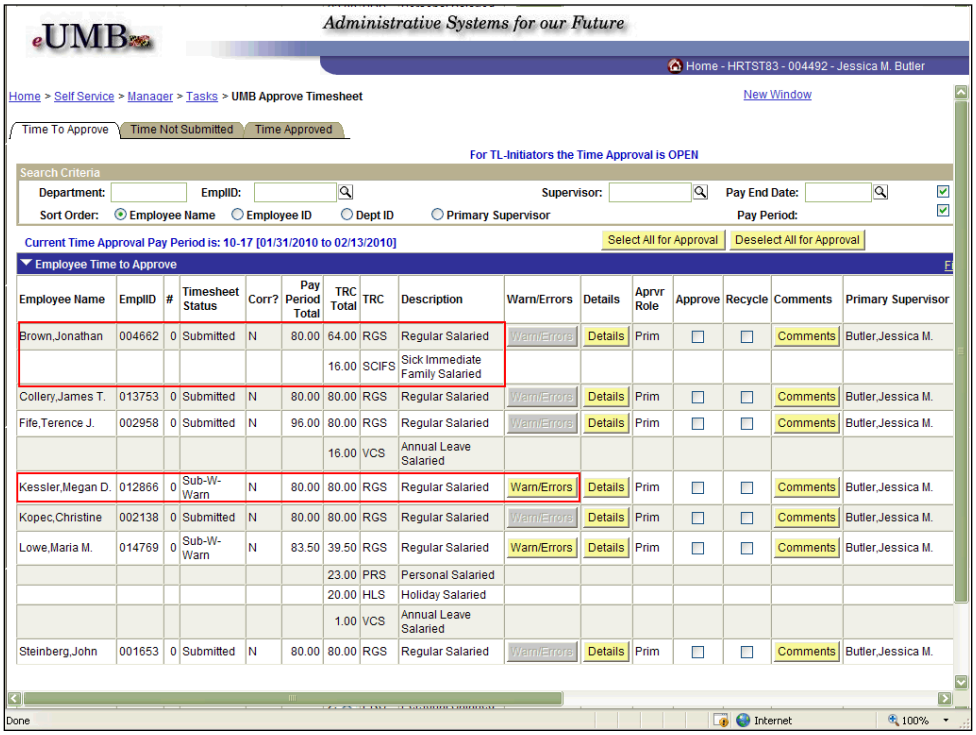


Step	Action
12.	This is the **Time Not Submitted** tab. This tab is used to display employees who have not submitted their timesheets or whose timesheets have been recycled (returned to the employee for correction). The search criteria and results are similar, if not identical, to those under the **Time To Approve** tab. In the **Search Criteria** section, the Checkboxes will allow you to view timesheets with these two statuses: • *Not-Submtd* - the timesheet for the pay period in the Pay Period ID column was never submitted • *Recycled* - if an error was found by either the supervisor or T&L Initiator and the timesheet was returned to the employee, it will appear on this tab until the employee makes the correction and resubmits his or her timesheet. Let's take a look at the final tab on this page, the **Time Approved** tab.

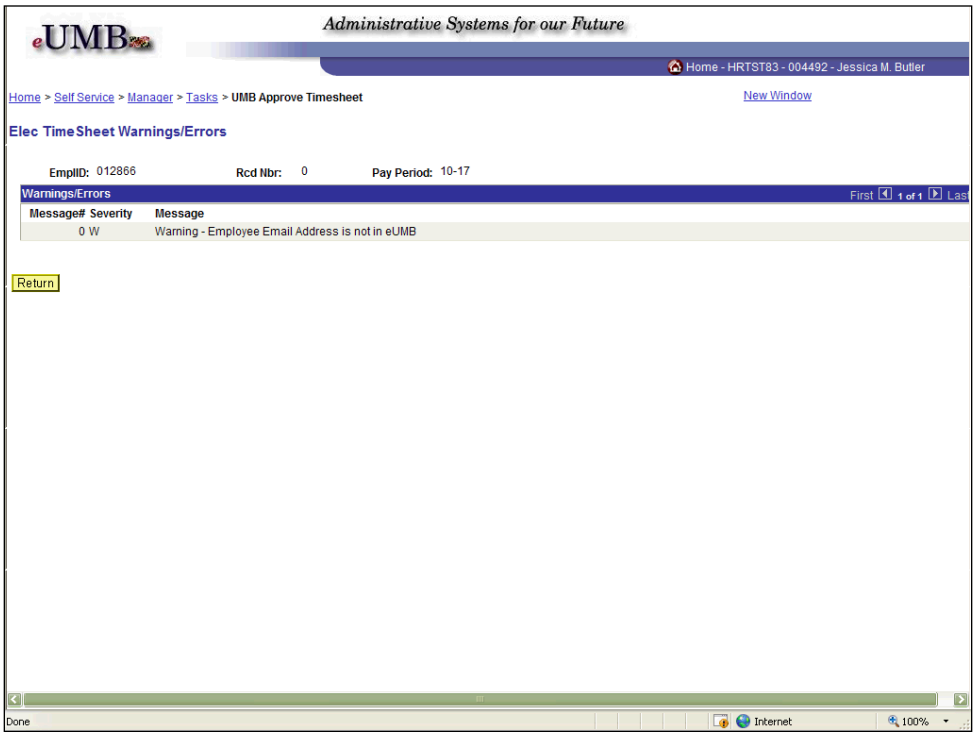


Step	Action
13.	This is the **Time Approved** tab. Timesheets that have been approved by the supervisor or payroll rep, including those that have been loaded for payroll processing, will appear on this tab. The search criteria and results are similar, if not identical, to those under the **Time To Approve** tab. In the **Search Criteria** section, the Checkboxes will allow you to view timesheets with these 3 statuses: • *SPRV-APRVD* - timesheets approved at the supervisor level • *TLIN-APRVD* - timesheets approved at the T&L Initiator level • *Loaded* - timesheets whose data have been loaded for payroll processing Only timesheets approved during the current approval pay period will appear. This completes the overview of the three tabs. Now we're going to walk through a couple of exercises to learn how this page works.

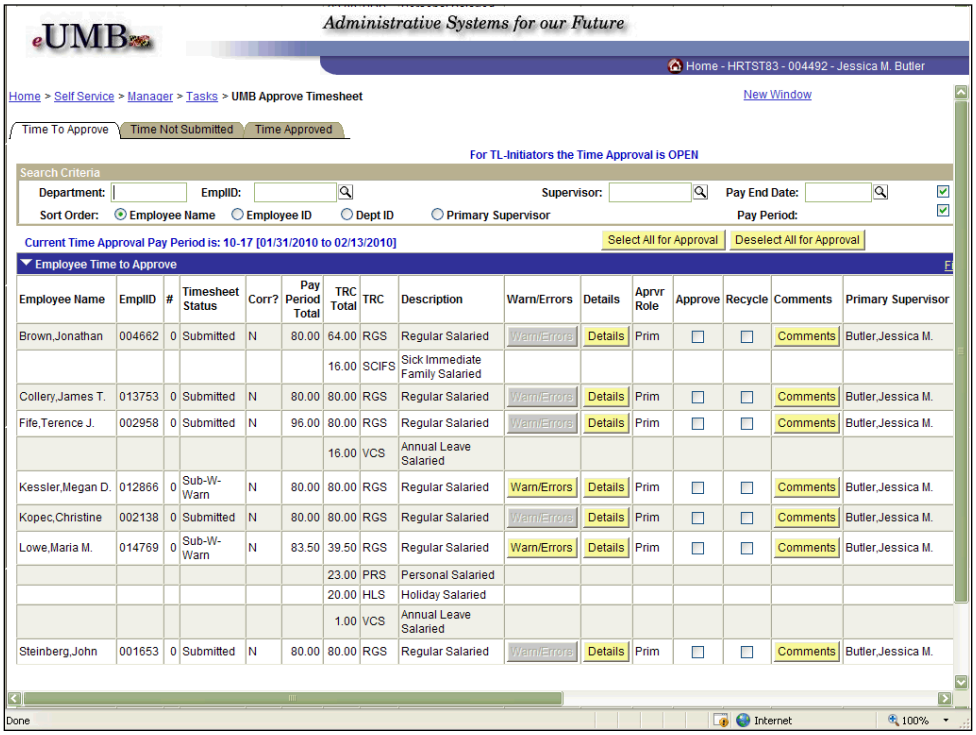
Step	Action
14.	**Exercise 1 - Accessing and Approving Timesheets** For this exercise, you are Jessica Butler. You are the supervisor for the department. As a supervisor, you will receive a daily e-mail every morning informing you that there are timesheets submitted for approval. However, you don't have to wait for the e-mail to access and begin approving timesheets. **Note:** In the **Search Criteria** box, you can enter data to narrow down your search if desired. Depending on how many departments you work with may determine if you want to enter information into the *Department* field. You can leave it blank, enter only a portion (e.g., in this case, 0650), or enter the entire number. **Best Practices:** * Review both *Pay Period Total* and *TRC Total* to help determine if the time is accurate. * If the "Warn/Errors" button is active, click on it to review. * If you have any questions or concerns about the employee's time, click on "Details" to review their actual timesheet. * Use the "Comments" button to explain why you are recycling a timesheet. This information will appear in an e-mail to the employee so that they will know what the problem is. You can only approve one pay period for an employee at a time.



Step	Action
15.	Each employee's time is broken down by TRC. If you look at Jonathan Brown, you will see that he is submitting 80 hours total. This is comprised of 64 regular hours and 16 Sick. You can review the totals for accuracy. However, Megan Kessler has an active **Warn/Errors** button. We want to look at this in more detail. Click the **Warn/Errors** button. Warn/Errors

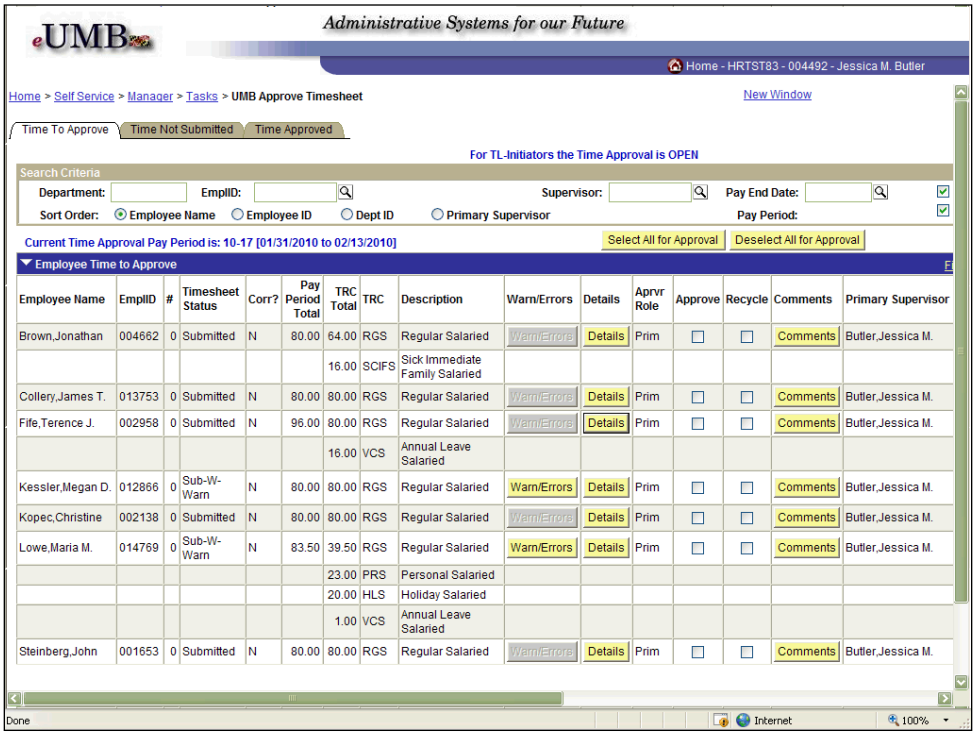


Step	Action
16.	You will only see Warnings that the employee chose not to fix before submitting. Megan has a Warning that she does not have an e-mail address on file in eUMB. Without further review, this is a warning you aren't concerned about and will approve her timesheet. Click the **Return** button. Return
17.	You have another employee who submitted her timesheet with warnings. Click the **Warn/Errors** button. Warn/Errors
18.	Along with a missing e-mail address, Maria Lowe submitted her timesheet with HLS (Holiday) leave that exceeds her available leave of 16 hours by 4 hours. Click the **Return** button. Return



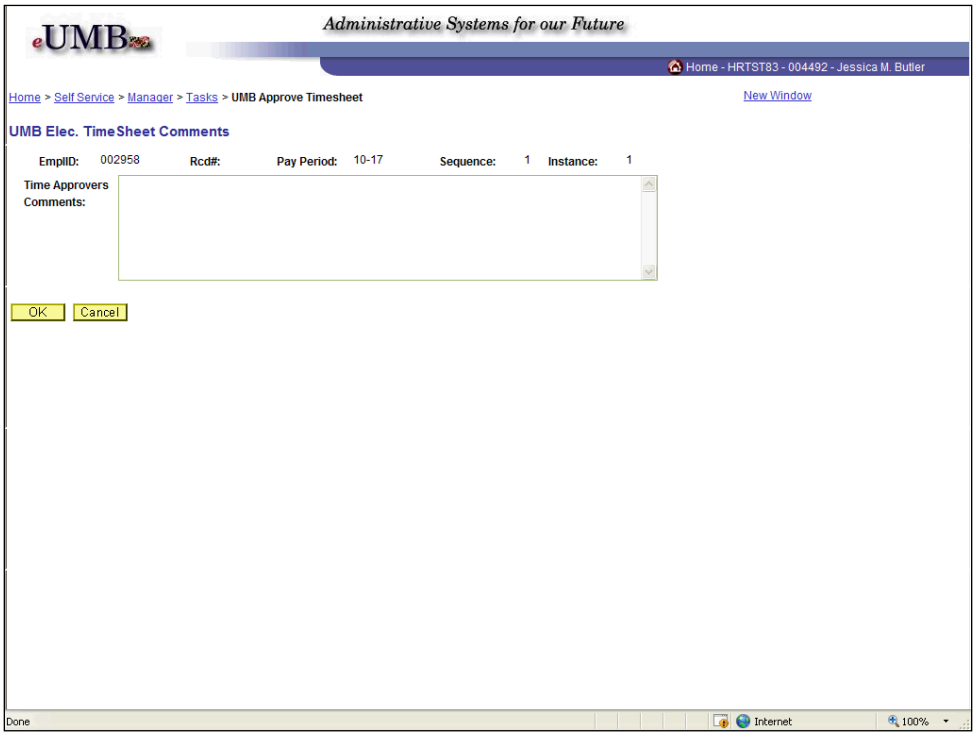
Step	Action
19.	To help determine if you will approve or recycle the timesheet, you want to look at Maria's timesheet. Click the **Details** button. Details
20.	Maria's timesheet will appear in a new window. You can review it as needed to determine if you should approve it or if there is a problem that the employee needs to fix. The **Leave Balance** tab is available to you if you want to review the employee's balances. As a supervisor, you have the ability to correct the timesheet yourself. If you do this, it is a Best Practice to communicate this to your employee. However, we recommend that as a normal course of action, return the timesheet to the employee and let them make any necessary corrections. For this example, you decide the timesheet is fine. Maria has gone over her balance by 4 hours but she is still within both the system and department limits of -16 hours for Holiday leave. You will approve it. Click the **Close** button.

Step	Action
21.	In continuing your review of your employees timesheets, you notice Terence Fife is submitting 96 hours. He normally only submits 80 so this seems odd to you so you want to look at his timesheet for more information. Click the **Details** button.
22.	In looking at his timesheet, you notice that he recorded two days of annual leave on Thu 02/04 and Fri 02/05. However, he did not clear out his Regular hours. This is why 96 hours are appearing instead of 80. You need Terence to correct this before you can approve it. Click the **Close** button.



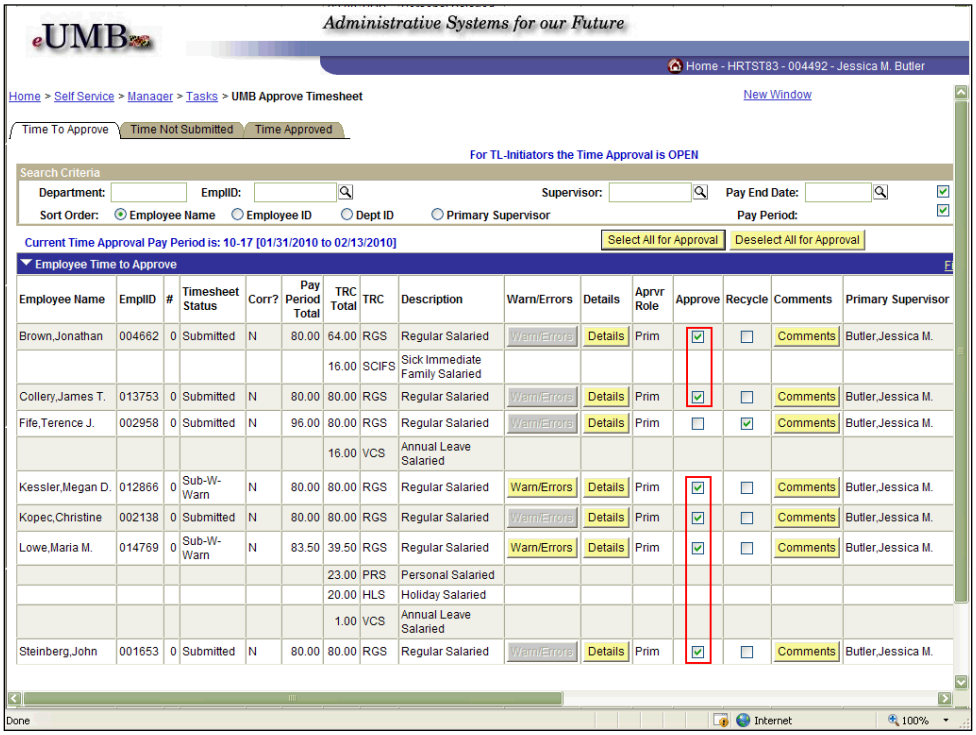
Step	Action
23.	In order to return a timesheet to an employee, you must check **Recycle** for that employee. Click the **Recycle** option.

Step	Action
24.	Again, a Best Practice is to include a Comment so that the employee will know why the timesheet is being returned to them. In order to enter comments, you must select **Recycle** first. Click the **Comments** button. Comments

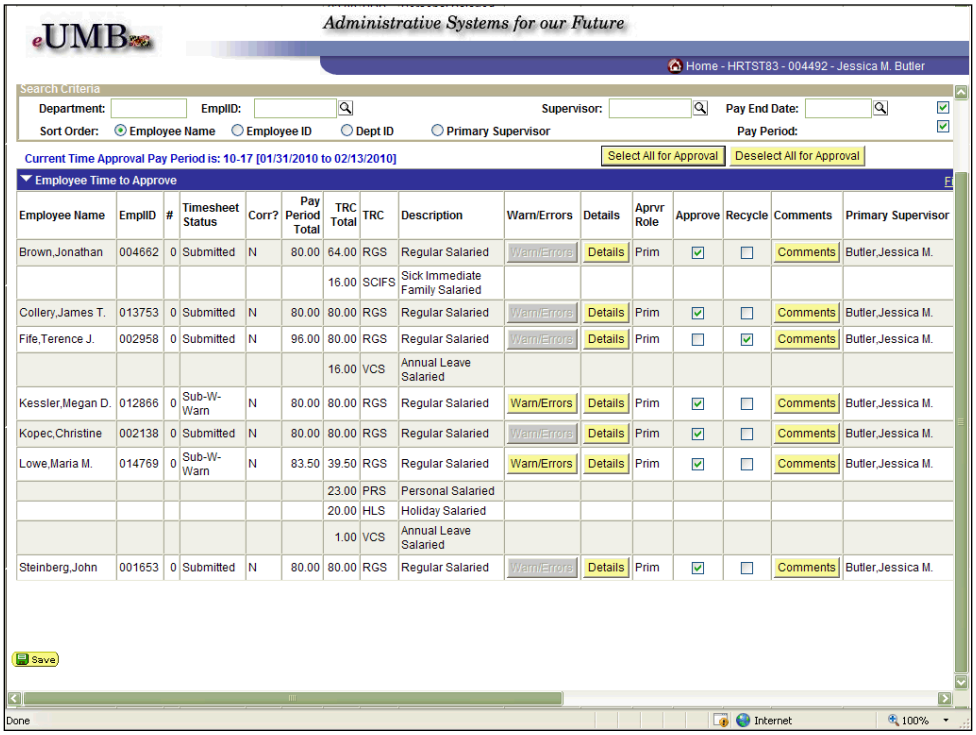


Step	Action
25.	Any comments you enter will only appear in an e-mail to the employee. Enter "**You entered both annual leave and regular hours for 2/4 and 2/5. Please correct.**" into the **Time Approvers Comments** field. (For the purpose of the UPK training, press **[Enter]** on your keyboard if you have problems entering text in the field.)
26.	Click the **Ok** button. OK

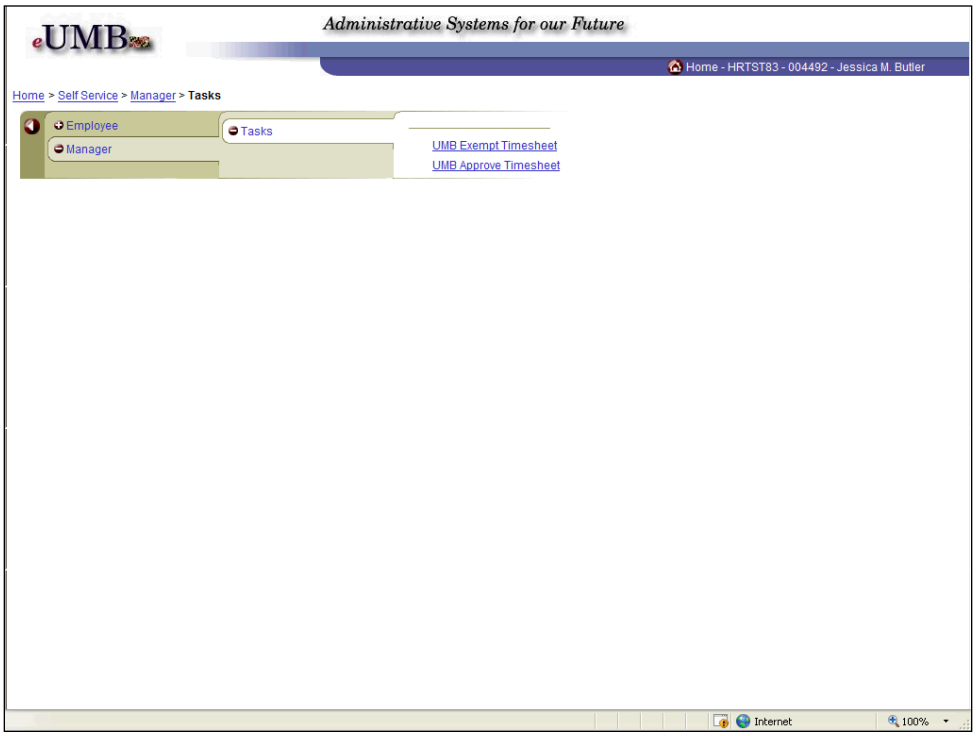
Step	Action
27.	Other than Terence you've determined the other timesheets are fine and ready to be approved. Click the **Select All for Approval** button. Select All for Approval



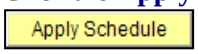
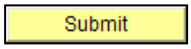
Step	Action
28.	All the timesheets that had nothing selected (Approve or Recycle) will now appear with checks in the **Approve** checkbox. **Scroll** down to the bottom.



Step	Action
29.	Click the **Save** button. Save
30.	The **Approve/ Recycle** checkboxes are now grayed out. If you look at the Status column, you will now see that the Status for these timesheets changed to either Recycled or SPRV-Apv. Once Jean makes her corrections and resubmits the timesheet, you can approve. This concludes Exercise 1.



Step	Action
31.	**Exercise 2 – Entering time for an employee** For this exercise, it is Monday, February 15th. Timesheets are due but your employee, Melissa Garnicki, is out of the office on an emergency. She called and asked you to submit her timesheet for her. During the prior two weeks, she did not take any leave. The breadcrumbs are: Home > Self Service > Manager > Tasks > UMB Exempt Timesheet Click the **UMB Exempt Timesheet** link. UMB Exempt Timesheet
32.	This is the **Add a New Value** page. Enter the employees EmplID into the **EmplID** field. If you do not know the employee's EmplID, you can conduct a search for it by using the Search icon. You can also enter your own EmplID and enter your timesheet from this page. Enter "**004143**" into the **EmplID** field.

Step	Action
33.	**Empl Rcd Nbr** - is applicable if the employee is a concurrent employee. **End Date** - will pre-fill with the last day of the present pay period. Make sure this date is correct before proceeding. Click the **Add** button.
34.	The employee's timesheet will appear. Review the Header section to verify you have the correct employee. At this point, entering their time is the same as entering it for yourself. For this exercise, we're going to keep it simple! Click the **Apply Schedule** button. 
35.	**Scroll** down to the bottom of the page.
36.	Click the **Submit** button. 
37.	Unlike at the employee level, the timesheet does not gray out. As a supervisor, you have the ability to make corrections once a timesheet is submitted. The employee's time has been entered. If so desired, you can immediately go to the **Approve Timesheet** page and the timesheet will appear and be ready for approval. This concludes Exercise 2.
38.	This concludes the topic **Timesheet Processing**. If you have questions as you begin using the electronic timesheet and approval pages, we recommend that you contact your department's Payroll Representative first as they are familiar with both timesheets and departmental policies. For technical difficulties call the ASC Help Desk at 6-HELP (6-4357). **End of Procedure.**