

eUMB Electronic Timesheets
T&L Initiators – Supervisor Set-Up and Maintenance

Created on Monday, March 22, 2010

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eUMB Electronic Timesheets

T&L Initiators

Supervisor Set-Up & Maintenance (030410)

This topic covers **Supervisor Setup & Maintenance**. Starting with PP 10-21 (3/28 – 4/10), exempt employees will enter their time and leave on-line via eUMB. Supervisors will then be able to approve the electronic timesheet, which will then be routed to the T&L Initiator for second level approval.

Before the initial "go-live", the department is responsible for setting up the supervisor structure in eUMB. This determines the routing of the timesheets once employees submit their time. The system does not automatically know which employees report to which supervisors. **This setup MUST be done before employees in your department can enter timesheets.**

The Supervisor Setup page will then continue to be maintained by your department. As status changes occur (supervisors are terminated, a new employee joins your department), this page must be updated.

A "Supervisor Setup" role has been created in eUMB for this purpose, and anyone with this role will automatically receive status change emails. T&L Initiators will automatically be assigned the "Supervisor Setup" role. Other users can also be assigned this role (via a Security Request form) if necessary.

Be aware that this page drives the supervisor's security role. If you remove someone entirely from this page as a supervisor, he/she will no longer have supervisor access to eUMB.

Procedure

This topic introduces you to the **Supervisor Setup & Maintenance** process. This includes how to assign supervisors by mass application, by individual, and when required due to job changes for both employees and supervisors.

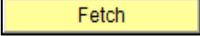
***** IMPORTANT ***** This is the first of **three** topics that T&L Initiators need to take in order to understand all aspects of the Electronic Timesheet process. The suggested order for review and completion is:

- 1 - Supervisor Setup (this topic)
- 2 - Electronic Timesheets (under the Exempt Employees folder)
- 3 - Approving Timesheets (under the T&L Initiator folder)

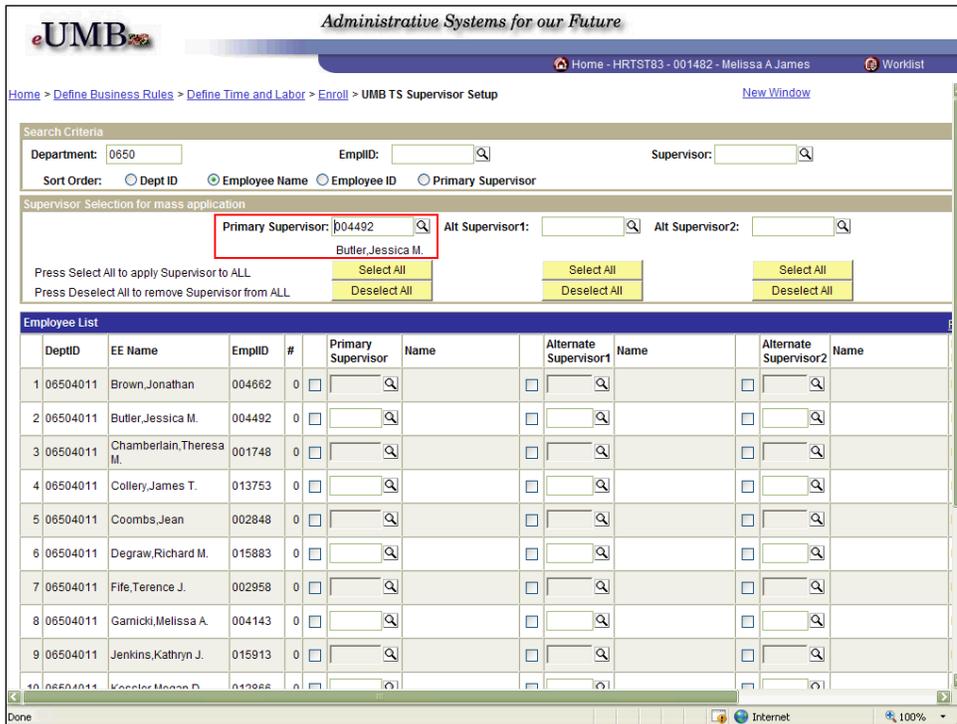
Step	Action
1.	From the Home menu, navigate to the TS Supervisor Setup . Click the Define Business Rules link. Define Business Rules
2.	Click the Define Time and Labor link. Define Time and Labor
3.	Click the Enroll link. Enroll
4.	Click the UMB TS Supervisor Setup link. UMB TS Supervisor Setup

Step	Action
5.	<p>This is the TS Supervisor Setup page. There are two tabs at the top: Supervisor Set Up and Assign Proxy Suprv. Let's take a moment to look at how the page is set up.</p> <p>Search Criteria – This section allows you to search for:</p> <ul style="list-style-type: none"> • Department – Useful if you cover more than one department and only want to look at one at a time. • EmplID – Allows you to view one employee at a time. • Supervisor – You can pull up all employees under a specific supervisor. • Maintenance Required – Retrieves employees who need supervisor maintenance. i.e., they need to be assigned a supervisor or need a new supervisor (due to termination, transfer, etc.). • Sort Order – You can choose the order in which you retrieve the employees. • Fetch – Retrieves your employees based on the Search Criteria. If no criteria is entered, "Fetch" will pull up all employees you have access to. <p>This is a great tool if you work with a lot of departments, employees or supervisors. This allows you to greatly narrow down a group of employees and simplifies any changes or updates you need to make.</p>

Step	Action
6.	<p>Supervisor Selection for mass application</p> <p>This section allows you to assign a supervisor and/ or alternate to multiple employees at one time. This can be very helpful if you have large department(s) to work with. We will look at this section in more detail shortly.</p>
7.	<p>Employee List – This section lists your employees that were retrieved based on the search criteria.</p> <p>First 4 columns:</p> <ul style="list-style-type: none"> • "<u>Dept ID</u>" through "<u>#</u>" - Identifying information for the individual employees. <p>Next 9 columns:</p> <ul style="list-style-type: none"> • "<u>Primary Supervisor</u>" through "<u>Alternate Supervisor2</u>" - An employee can have up to three supervisors, who are listed by their EmplID and name (Primary, Alternate 1 and Alternate 2). If the fields are blank, a supervisor has not been assigned. <p>Remaining columns:</p> <ul style="list-style-type: none"> • <u>Maintenance Required</u> – If a status change has occurred for any of the employees or supervisors (new, transfer, terminated, etc.), the change will be listed and you will need to make the appropriate updates. • <u>Last Update User ID/ Date/Time</u> – The last person to make a change to the supervisor setup page will be listed by their EmplID, along with the date and time of the change. If "Batch" appears, the system made the update.
8.	<p>Setup Rules</p> <p>Before continuing with the actual setup, there are some rules to be aware of when setting up supervisors:</p> <ol style="list-style-type: none"> 1. All employees must have a Primary Supervisor and an Alternate Supervisor1 assigned to them. 2. Up to two alternates can be assigned (the 2nd alternate supervisor is optional). 3. The Primary and Alternate(s) cannot be the same person. 4. Employees cannot be assigned to themselves as either a Primary or Alternate supervisor. <p>System edits are in place to enforce the rules. If the data you enter does not match the rules, you will not be able to Save.</p>

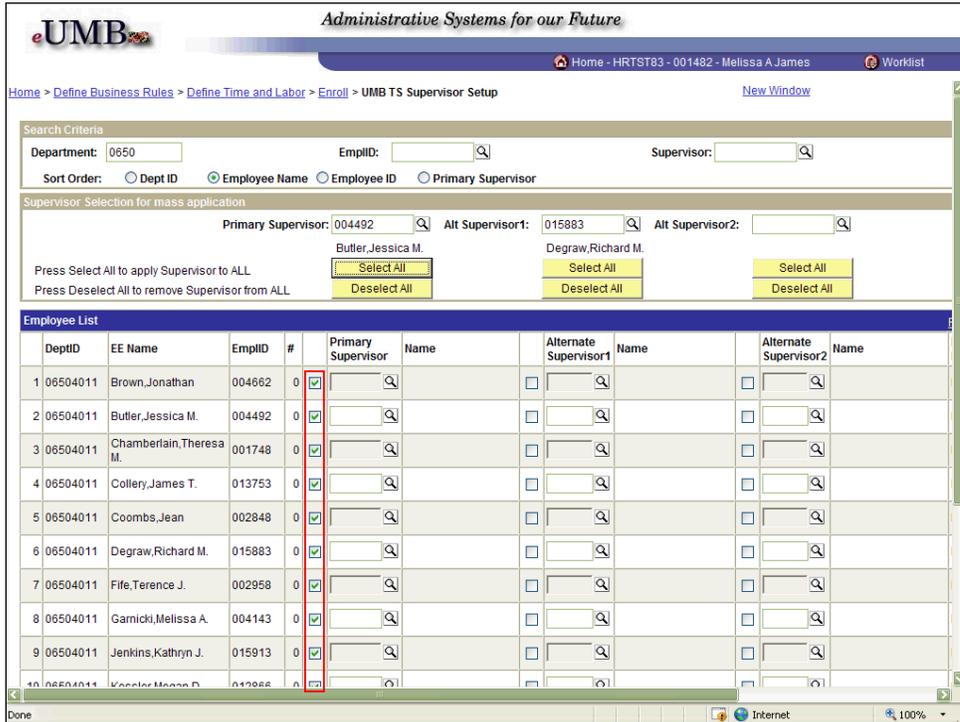
Step	Action
9.	<p>Exercise 1 - Using mass application and viewing an error message</p> <p>For this exercise, you are Melissa James, a T&L Initiator with the Supervisor Setup role. You will conduct the initial setup for the 15 exempt employees in your department in order for them to be able to enter their timesheets electronically.</p> <p>You will use the mass application feature to quickly assign a supervisor to the entire department.</p>
10.	<p>In the Search Criteria section, click in the Department field.</p> 
11.	<p>The number of departments you work with may determine if you need/want to narrow down your employees by department using the Department field. You can leave it blank, enter only a portion of the department number, or enter the entire number.</p> <p>For this exercise, you will enter a portion of the Department number.</p> <p>In the Search Criteria section, enter "0650" in the Department field.</p>
12.	<p>Scroll to the right.</p> 
13.	<p>Click the Fetch button.</p> <p>Your normal security settings are in effect and only those departments/ employees that you have access to will be returned.</p> 
14.	<p>Scroll to the left.</p> 
15.	<p>All exempt employees who are required to complete a timesheet are returned in the Employee List section. The list will default to <i>Employee Name</i> order.</p> <p>You are going to assign Jessica Butler as the Primary Supervisor. As you do not know her EmplID, you can conduct a search by name.</p> <p>In the Supervisor Selection for mass application section, click the Search button to the right of the Primary Supervisor field.</p> 
16.	<p>On the Lookup Primary Supervisor page, click in the Name field.</p>
17.	<p>Enter "Butler" into the Name field.</p>
18.	<p>Click the Lookup button.</p> 

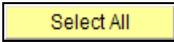
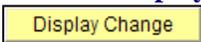
Step	Action
19.	<p>The search will return all employees and affiliates that meet your search criteria.</p> <p>Employees in another department and/or affiliates can be supervisors for your department.</p> <p>Click the Butler, Jessica M. link.</p> <p>Butler, Jessica M.</p>



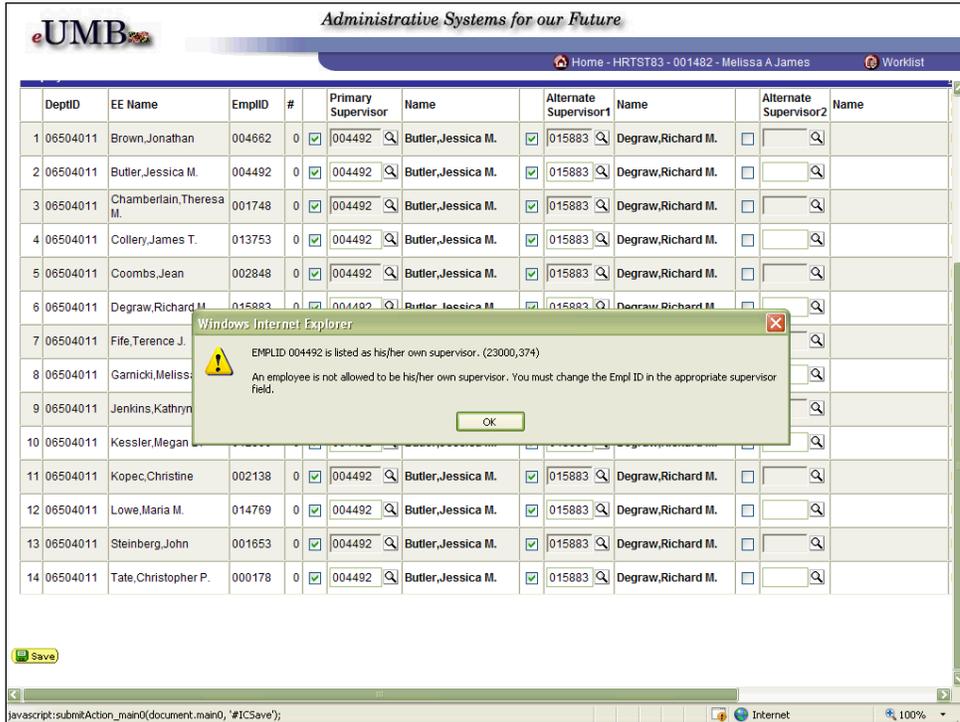
Step	Action
20.	<p>Jessica's EmplID now appears in the Primary Supervisor field along with her name below the field.</p> <p>Press [Tab].</p>
21.	<p>Next, you are going to assign Richard Degraw, EmplID 015883, as the Alt Supervisor1.</p> <p>(For the remainder of this topic, you are going to use the employee's EmplID instead of doing a search each time.)</p> <p>Enter "015883" into the Alt Supervisor1 field.</p>

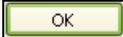
Step	Action
22.	Press [Tab] .
23.	<p>"Select All" will allow you to quickly select (place a checkmark to the left of) all employees in your department.</p> <p>When using the mass application option, a checkmark is required for each employee for whom the change is to be effective. If there is no checkmark, no change will take place for that employee (no supervisor will be assigned to them). Also, the checkmarks must be in the appropriate column. If you are changing the Primary Supervisor, the Primary Supervisor checkbox(es) must be selected.</p> <p>Click the Select All button under the Primary Supervisor field.</p> 

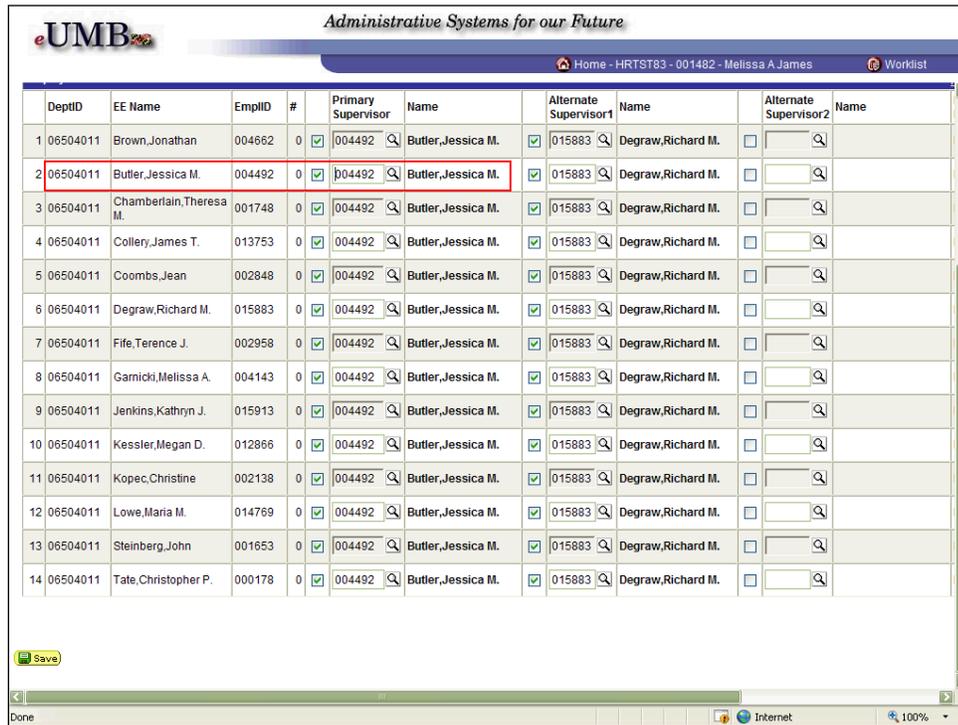


Step	Action
24.	<p>Checkmarks now appear to the left of the Primary Supervisor field for each employee.</p> <p>Note: If you realize you do not want to assign a supervisor to everyone, you can either click the Deselect All button, or you can individually uncheck employees.</p> <p>Click the Select All button under the Alt Supervisor1 field.</p> 
25.	<p>Checkmarks now appear to the left of the Alternate Supervisor1 field for each employee.</p> <p>Scroll to the right.</p> 
26.	<p>Click the Display Change button.</p> 

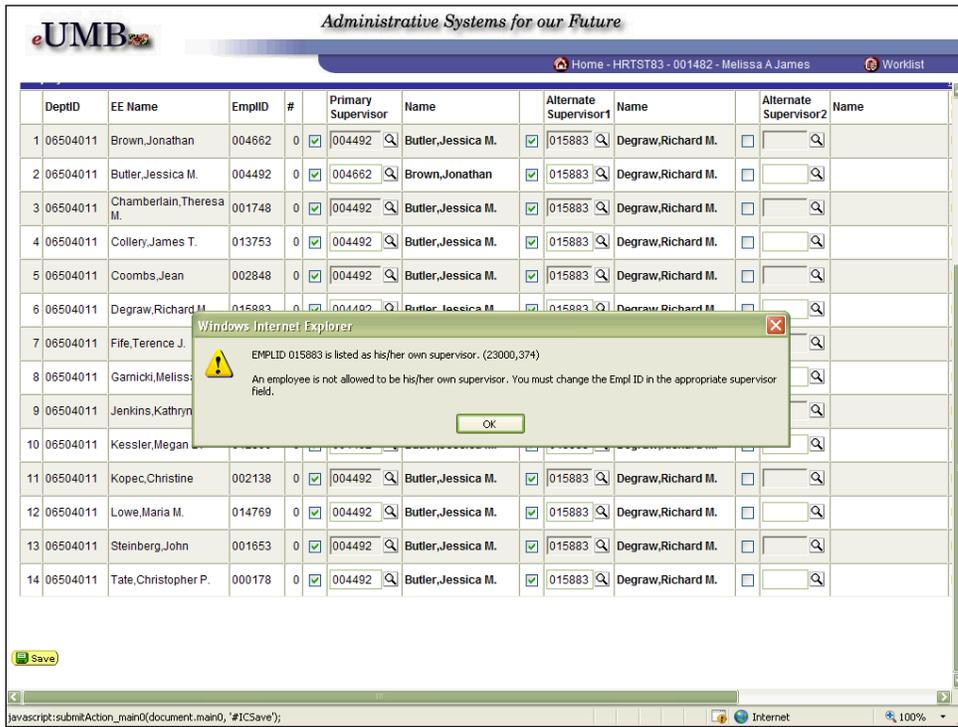
Step	Action
27.	The assigned Primary Supervisor and Alternate Supervisor1 names now appear next to each employee. Scroll down to the bottom of the page. 
28.	Scroll to the left. 
29.	Click the Save button. 



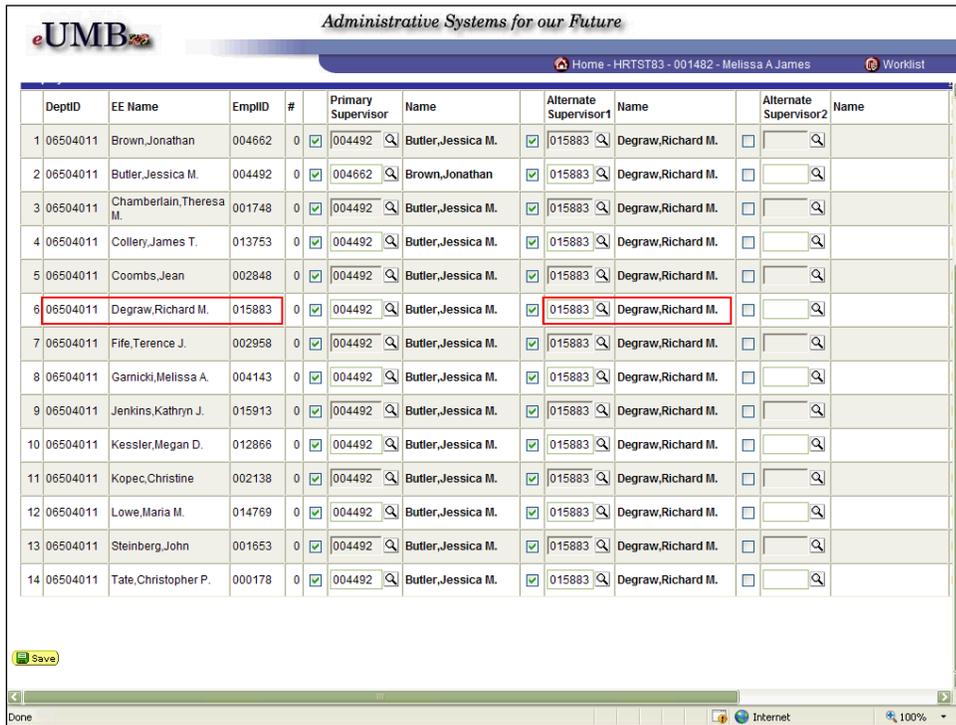
Step	Action
30.	<p>The system ran through the edit process previously mentioned. We are seeing an error message that "EMPLID 004492 is listed as his/her own supervisor."</p> <p>Both our Primary and Alternate supervisors are also employees. We need to assign a different supervisor to each of these people before the system will let us proceed. We will not be able to Save until the problem is fixed.</p> <p>Click the OK button.</p> 



Step	Action
31.	<p>The cursor will default to the field in error. In this example, we need to assign someone else as Primary Supervisor for Jessica.</p> <p>Click in the Primary Supervisor field for Jessica Butler.</p> 
32.	<p>We will assign Jonathan Brown, 004662, as Jessica's supervisor.</p> <p>Enter "004662" into the Primary Supervisor field.</p>
33.	<p>Press [Tab].</p>
34.	<p>After pressing [Tab], the new supervisor's name will appear.</p> <p>Click the Save button.</p> 

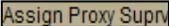


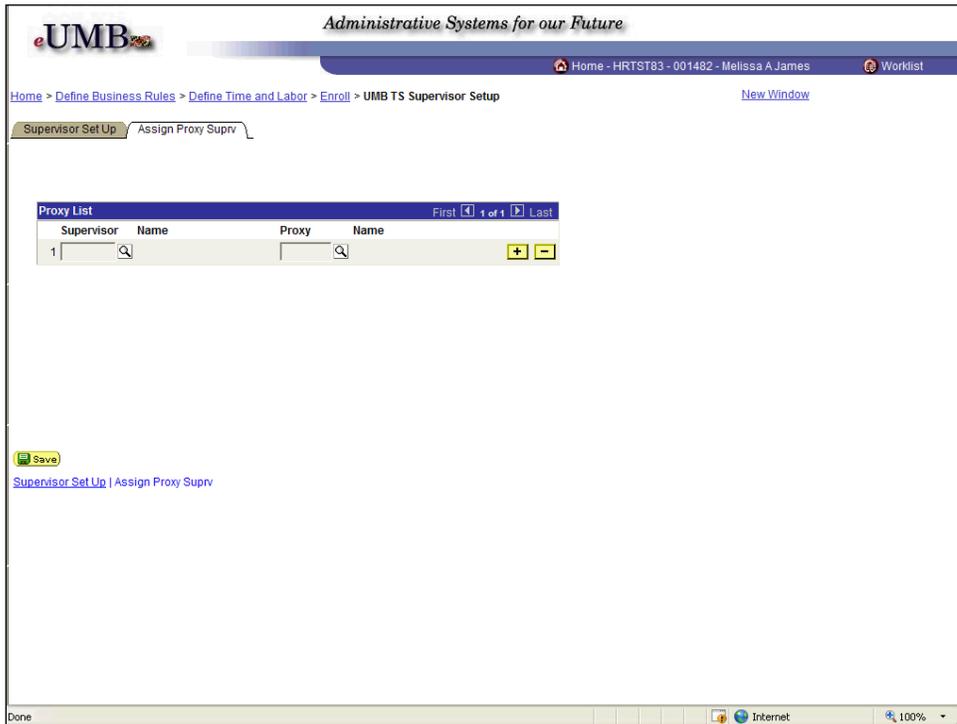
Step	Action
35.	<p>We are now receiving the same error message for employee 015883.</p> <p>Click the OK button.</p> 



Step	Action
36.	<p>Richard Degraw is listed as his own Alternate Supervisor1. We need to change the Alt Supervisor1 for Richard Degraw.</p> <p>Note: When you received the error message for Jessica Butler, you could have made this change at the same time if you were aware of it.</p> <p>Click in the Alternate Supervisor1 field.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">015883</div>
37.	<p>We will assign Jonathan Brown, 004662, as Richard's alternate supervisor.</p> <p>Enter "004662" into the Alternate Supervisor1 field.</p>
38.	<p>Press [Tab].</p>
39.	<p>Again, after pressing [Tab], the new supervisor's name will appear.</p> <p>Click the Save button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Save</div>

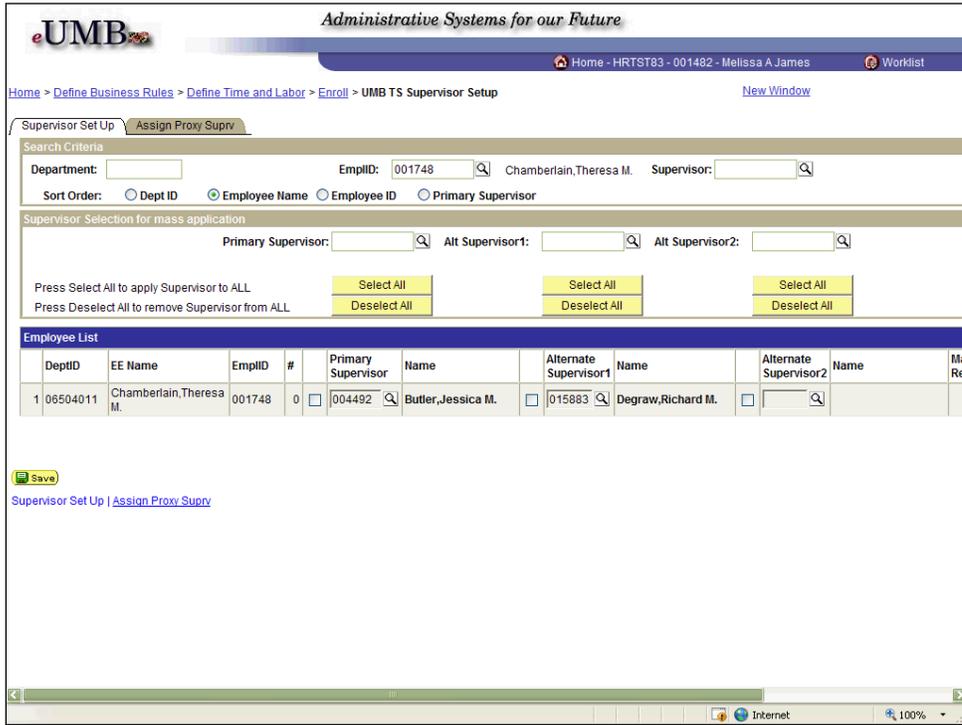
Step	Action
40.	<p>If the setup passes all the edits, the checkmarks will disappear and the changes will be saved.</p> <p>This completes Exercise 1.</p> <p>Reminder: When using the mass application feature -</p> <ul style="list-style-type: none">* You must click Display Change to force the change to all the selected employees.* You must select employees to be affected by using the checkboxes. If the employees name is not checked, no change will occur once you click Display Change.* Select Save after each change to ensure you are capturing all your changes as expected.

41.	<p>Exercise 2 - Assigning a Proxy Supervisor</p> <p>The Proxy Supervisor role gives a person <i>view only</i> access to the timesheets of employees under a specific supervisor.</p> <p>This role was created to meet the needs of certain departments where a supervisor wants another person to be able to view the timesheets for the department before the supervisor approves them.</p> <p>This is an optional feature.</p> <p>In order to use this role, the supervisor must be set up in eUMB as a supervisor and only employees in the department(s) you have access to can be assigned as a proxy supervisor.</p> <p>This person does not have the ability to approve the timesheets. Again, it is <i>view only</i>.</p> <p>For this exercise, we are going to assign Megan Kessler as a Proxy Supervisor for Jessica Butler.</p>
42.	<p>Click the Assign Proxy Suprv tab.</p> <p></p>

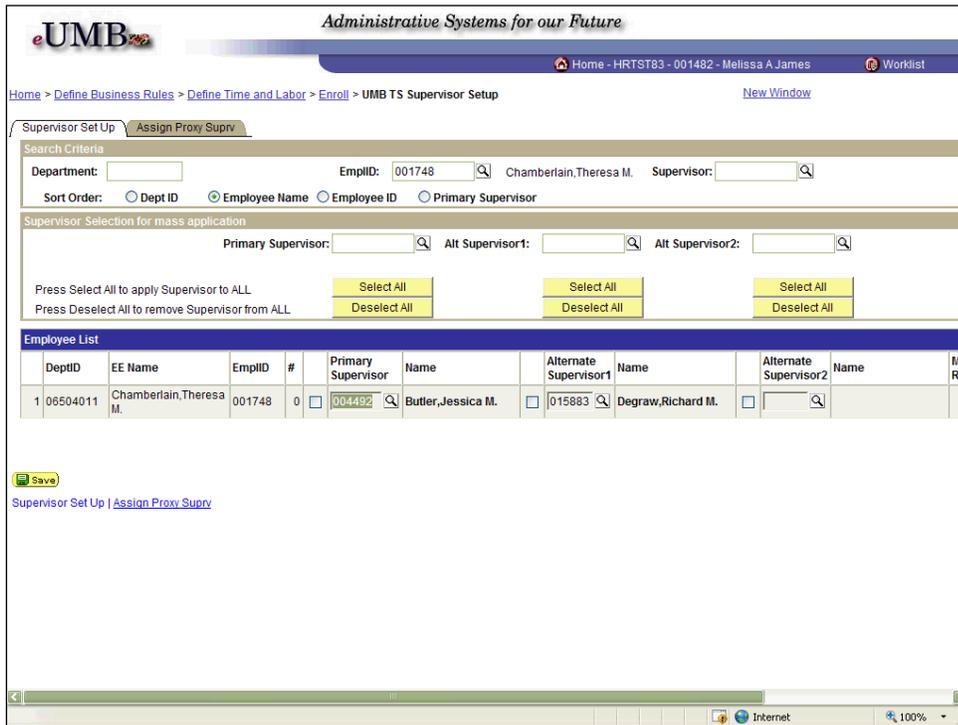


Step	Action
43.	Click in the Supervisor field. 
44.	Enter " 004492 " into the Supervisor field.
45.	Press [Tab] .
46.	Enter " 012866 " into the Proxy field.
47.	Click the Save button. 
48.	Megan Kessler is now the Proxy for Jessica Butler. Again, Megan can only view the timesheets for Jessica's employees. To view the timesheets, Megan would access the UMB Approve Timesheet page that supervisors and T&L Initiators use to approve.

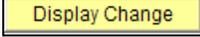
49.	<p>Maintaining the Supervisor Setup page</p> <p>After the initial Supervisor Setup, your department is responsible for keeping this page updated. As status changes occur for employees and supervisors, you (or whoever is assigned the Supervisor Setup role) will need to update this page.</p> <p>The next three exercises are to show you different ways to make changes. While designed with continuing mainenance in mind, these steps can also be helpful while doing the initial Supervisor Setup (as reviewed in Exercise 1).</p>
50.	<p>Exercise 3 - Changing supervisors one at a time</p> <p>For this exercise, you are going to change the supervisor for just one employee. Theresa Chamberlain no longer reports to Jessica Butler. She now reports to Jonathan Brown.</p> <p>Click the UMB TS Supervisor Setup link.</p> <p>UMB TS Supervisor Setup</p>
51.	<p>Instead of pulling all employees in a department, you can conduct a search to access just Theresa Chamberlain in the Employee List section.</p> <p>In the Search Criteria section, click in the EmplID field.</p> <p><input type="text"/></p>
52.	<p>Enter "001748" into the EmplID field.</p> <p>Remember: If you don't know the EmplID, you can conduct a Search by name using the magnifying glass icon to the right of the field.</p>
53.	<p>Scroll to the right.</p> <p></p>
54.	<p>Click the Fetch button.</p> <p></p>
55.	<p>Scroll to the left.</p> <p></p>



Step	Action
56.	<p>Only Theresa Chamberlain appears in the Employee List.</p> <p>Click in the Primary Supervisor field.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">004492</div>

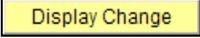


Step	Action
57.	<p>Reminder: You do not need to click the checkbox to the left of the field when making changes individually. Employees only need to be checked when you are using the mass application feature.</p> <p>Enter "004662" into the Primary Supervisor field.</p>
58.	Press [Tab] .
59.	Click the Save button. 
60.	Jonathan Brown now appears as the Primary Supervisor for Theresa Chamberlain. This completes Exercise 3.

61.	<p>Exercise 4 - Changing by both group and individual</p> <p>For this exercise, we are going to change the Alt Supervisor1 for three employees. This method uses the ability to change an employee individually, as we saw in Exercise 2, while also using features of mass application, as we saw in Exercise 1.</p> <p>We are going to change the Alternate Supervisor from Richard Degraw to Alex Walker for three employees.</p>
62.	<p>Scroll to the right.</p> 
63.	<p>Click the Fetch button.</p> 
64.	<p>Scroll to the left.</p> 
65.	<p>Click the checkbox for Alt Supervisor1 for James Collery.</p> <input data-bbox="370 869 407 905" type="checkbox"/>
66.	<p>Click the checkbox for Alt Supervisor1 for Terence Fife.</p> <input data-bbox="370 953 407 989" type="checkbox"/>
67.	<p>Click the checkbox for Alt Supervisor1 for Kathryn Jenkins</p> <input data-bbox="370 1037 407 1073" type="checkbox"/>
68.	<p>In the Mass application section, click in the Alt Supervisor1 field.</p> <input data-bbox="370 1121 516 1157" type="text"/>
69.	<p>Enter "002916" into the Alt Supervisor1 field.</p>
70.	<p>Press [Tab].</p>
71.	<p>Alex Walker's name appears below the Alt Supervisor1 field.</p> <p>Scroll to the right.</p> 
72.	<p>Click the Display Change button.</p> <p>Note: Remember, anytime you use the mass application section, you must select "Display Change" to force the changes.</p> 
73.	<p>Alex Walker's name now appears next to those three employees.</p> <p>Scroll to the bottom of the page.</p> 

74.	Scroll to the left. 
75.	Click the Save button. 
76.	The changes have passed the edits and are now saved. This completes Exercise 4.

77.	<p>Exercise 5 - Maintenance Required</p> <p>For this exercise, you received an e-mail stating that Supervisor Jonathan Brown has been terminated. You will now need to reassign any employees who report to him to another supervisor. We are going to assign them to Alex Walker.</p> <p>Click the UMB TS Supervisor Setup link.</p> <p>UMB TS Supervisor Setup</p>
78.	<p>Scroll to the right.</p>
79.	<p>Click the Fetch button.</p> <p></p>
80.	<p>By clicking Fetch with no other search criteria, you can see how any employee who is affected by a status change will be clearly visible. Their name is highlighted in red and the Maintenance Required column lists the change. In this example, we see "Supervisor Terminated".</p> <p>We are going to do a search to see <i>only</i> those employees affected by the change, which makes it easier to change just those employees.</p> <p>Click the Maintenance Required option.</p> <p><input type="checkbox"/></p>
81.	<p>Click the Fetch button.</p> <p></p>
82.	<p>Only the employees with a status change in the Maintenance Required column will appear.</p> <p>As Jonathan Brown is both a Primary and Alternate supervisor, we need to enter Alex Walker's EmplID into both fields in the mass application box.</p> <p>Click in and enter "002916" into the Primary Supervisor field.</p>
83.	<p>Press [Tab].</p>
84.	<p>Enter "002916" into the Alt Supervisor1 field.</p>
85.	<p>Press [Tab].</p>
86.	<p>As Jonathan is the Primary Supervisor for only one employee, it will be easiest to select that one employee.</p> <p>Click the checkbox to the left of the Primary Supervisor field for Jessica Butler.</p> <p><input type="checkbox"/></p>

87.	<p>However, as Jonathan is the Alternate Supervisor for four employees, it may be quicker to use the Select All feature.</p> <p>Click the Select All button.</p> 
88.	<p>Four out of the five employees listed have been selected. However, as Jonathan is not the Alternate Supervisor for Jessica Butler, we need to deselect Jessica.</p> <p>Click the checkbox to the left of the Alternate Supervisor1 field.</p> 
89.	<p>As we are using the mass application feature, it is necessary to change the display before saving.</p> <p>Click the Display Change button.</p> 
90.	<p>Alex Walker now appears as the Primary and Alternate supervisor for the selected employees.</p> <p>Scroll to the left.</p> 
91.	<p>Click the Save button.</p> 
92.	<p>The checkboxes have cleared and Alex Walker now appears as the Primary and Alternate supervisor instead of Jonathan Brown.</p> <p>This completes Exercise 5.</p>
93.	<p>This concludes Supervisor Setup & Maintenance.</p> <p>If you have questions or need further assistance, please contact FS-Payroll. End of Procedure.</p>