

ELECTRONIC TIME SHEET (ETS) EMPLOYEE TO SUPERVISOR “REPORTS TO” SETUP



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UPDATED INFORMATION:

1. Page 2: Exclusion of adjunct/part-time faculty and graduate assistants;
2. Page 2: Navigation instructions #1 and #2;
3. Page 3: On Demand--#7 Academic Note (Sabbatical & Research Leave); #7 NEW (Student employees)
4. Page 5: #10 - Alerts indicators for primary supervisors/time sheet approvers
5. Page 6: Employee Changes (**New Section**)

The purpose of the Employee-Supervisor/Alt Setup page is to establish the reporting relationship between employees and supervisors (or time sheet approvers) within a department. This setup is used to identify individuals responsible for approving electronic time sheets, as well as for the receipt of email notification/alerts relating to electronic time sheets for subordinate employees.

UPDATE: Upon implementation of electronic time sheets, Graduate Assistants and Adjunct Faculty are excluded from the electronic time sheet process. Incorporating this population in ETS may be revisited at a later date.

- For more information regarding time and/or effort reporting for Graduate Assistants, please contact the Graduate School.
- For more information regarding time and/or effort reporting for Adjunct Faculty, please contact the Office of the Provost.

WHO HAS ACCESS TO THIS COMPONENT? DEPARTMENTAL PAYROLL PREPARERS

Follow the instructions below to identify the electronic time sheet reporting relationship of employees within your department:

1. Log into myUMBC and navigate to the HR PeopleSoft system.
2. Once at the menu screen, click on ‘UMBC Time and Leave Processing’; then click on Employee Time Sheets.
3. You should then see a link for ‘Employee-Supervisor/Alt Setup’. Click on this link to access the setup page.
4. The Search Criteria page will appear. This component allows you to search by various data elements.
 - a. Dept ID allows you to enter your PS department code and pull all employees within that department.
 - b. EMPL ID allows you to search for a specific employee.
 - c. Name Search may be used if EMPL ID is unknown.
 - d. Last Name may also be used as an alternative for entering an EMPL ID to locate an employee.
 - e. Approver Position Nbr may be used to search for a supervisor. This is for the ‘primary’ supervisor.
 - f. Alternate Position Nbr is used to search for an individual to be identified as the ‘alternate’ supervisor.

Favorites | Main Menu > UMBC Time and Leave Processing > Employee Time Sheets > Employee-Supervisor/Alt Setup

Time Sheet Relationship Setup

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>

Select Function

Save

- Once a key identifier has been entered (the example below is using EMPL ID), click on the Search button to pull the individual's information to begin the set up.
- After clicking Search, a section for "Employee Relationship Mapping" will appear. This section will provide you with the key fields associated with the employee and his/her position (department id, empl id, name, position number and title).

Time Sheet Relationship Setup

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
			McNamara, Sherrell J					

Search Clear Search Select All Deselect All Select Function

Employee Relationship Mapping

Dept. ID	Description	Empl ID	Name	Position Nbr.	Title	On Demand (Y/N)	Approver Position Nbr.	Name	Send Alerts	Send Alerts	Alternate Position Nbr.	Name
<input type="checkbox"/>	10345	Human Resources	McNamara, Sherrell J	10001553	MANAGER	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		

Save

- After the title field, there is a checkbox labeled, "On Demand". This field is to flag employees whose time sheet generation should be set to an on demand mode. This is for employees who do not work a consistent schedule. Regular employees should NOT be coded as On Demand.

ACADEMIC NOTE: Faculty employees who are going on sabbatical or research leave should be coded as On Demand once they begin their leave. This will flag the ETS program NOT to require the faculty member to complete and submit a time sheet while on sabbatical or research leave. Thus, the faculty member will not receive time sheet notifications.

Once the faculty member returns from such leave, the payroll preparer will need to uncheck the On Demand indicator so the ETS program will resume the time sheet completion and submission requirement as well as the email alert notifications.

NEW: Due to the inconsistent work schedules for student workers, the system will **automatically check the On Demand checkbox for student employees.**

- The remaining fields are where you would assign the primary and alternate supervisor. Enter the position number for the primary in the 'Approver Position Nbr' field and press tab or enter. The name will appear.

- If the position number is unknown at the time of entry, simply click on the magnifying glass to bring up an expanded search page. You may enter the EMPL ID, last name or full name. Once the supervisor's name and corresponding information has been located, click on the name and the position number will populate in the 'Approver Position Nbr' field. When the position number has been populated, the supervisor's name will auto populate on the page.

Time Sheet Relationship SetUp

Search Criteria

Dept. ID	Description	Empl ID	Name Search
			McNamara, Sherrell J

Search Clear Search Select All Deselect All Select Function

Employee Relationship Mapping

Dept. ID	Description	Empl ID	Name	Position Nbr.	Title	
<input type="checkbox"/>	10345	Human Resources		McNamara, Sherrell J	10001563	MANAGER

Look Up Approver Position Nbr.

Position Number: begins with

Empl ID: begins with

Last Name: begins with

Name: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Position Number	Description	Empl ID	Last Name	Name
10000019	COORDINATOR		SOUDER	David Souder
10000039	ASSOC PROF&CHPRSN		GRABILL	Vincent Grabill
10000045	LIBRARIAN III		SIPE	Vicki Sipe
10000075	ASSOC PROF & DIR		LOVIGLIO	Jason Loviglio

10. The next field is the 'Send Alerts' checkbox. This checkbox specifies whether email alerts will be sent to the primary time sheet approver. The timesheet approver will receive all notifications relating to electronic time sheets for the employee identified in this section.

NEW: The system automatically checks the box for ALL primary time sheet approvers.

The next field is the 'Send Alerts' checkbox for the alternate time sheet approver. If an alternate time sheet approver will be designated and the alternate should receive email notifications as well, click the checkbox to enable the alerts feature for the alternate time sheet approver. The system **does not** automatically check the checkbox for alternate approver.

The last field is the 'Alternate Position Nbr' field for the alternate time sheet approver. This is where the alternate time sheet approver is identified. Enter the position number for the alternate and press tab or enter and the name will appear.

Time Sheet Relationship Setup

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
			McNamara, Sherrell J					

Search Clear Search Select All Deselect All Select Function

Employee Relationship Mapping

Dept. ID	Description	Empl ID	Name	Position Nbr.	Title	On Demand (Y/N)	Approver Position Nbr.	Name	Send Alerts	Send Alerts	Alternate Position Nbr.	Name
<input type="checkbox"/>	10345	Human Resources	McNamara, Sherrell J	10001553	MANAGER	<input type="checkbox"/>	10001470	Rochelle Sanders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10002236	Valerie Thomas

Save

11. Once all of the information has been entered, click Save.

EMPLOYEE CHANGES

Over time, departments will experience changes in employee workforce due to terminations, position changes, etc. As these changes are processed through the HR system, the ETS program will flag the employees' record within the Employee-Supervisor/Alt Setup page for the Payroll Preparer to review and take action.

NOTE: An employee who experienced a position change (change in title, department or both) but has a pending time sheet (in a Submitted or Approved status), will continue to appear on the setup page with the previous position data until the pending time sheet has been processed. Exception: If the employee's time sheet is in a New, On Demand or Rejected status, the previous position information will remain on the setup page for 60 days. After 60 days the row will purge.

1. Terminations: As an employee's position is terminated, the setup page will indicate (TERM) next to the individual's name (see screenshot below). If the individual has any pending time sheets in a Submitted or Approved status, the row will remain on the setup page until the time sheet has been processed through the ETS program and Payroll.

<input type="checkbox"/>	10409	Student Judicial	Singh, Skyer (TERM)	10003739	STUDENT	<input checked="" type="checkbox"/>	10003529	Cullen, Jeffrey E	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10013200	Hall, Davonya L
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If the individual has any pending time sheets in a New, Rejected or On Demand status, the row will remain on the setup page for 60 days. After 60 days, the row will be deleted from the setup page and the time sheet (New, Rejected or On Demand) will be purged from the system—based on the assumption that the time sheet is not required for time and payroll processing.

2. Position Changes: From time to time, employees may change positions. Some position changes may consist of a change in job title, change in department or both. The information below outlines what Payroll Preparers will see on the Employee-Supervisor/Alt Setup page for review and possible action:

a. *Title Change* – the setup page will show 2 rows if the employee has a time sheet pending submission, approval or payroll processing (see screenshot below). One row will show the original position and approver information. An indicator of (PREV) will appear in the name field.¹ The second row will display the new position information with blank approver fields which is the Payroll Preparer's queue to identify a primary and alternate time sheet approver.²

<input type="checkbox"/>	10345	Human Resources	Wright, Brandon Paul ²	10002244	HUMAN RES ASSOC I	<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	10345	Human Resources	Wright, Brandon Paul (PREV) ¹	10005385	GENERAL ASSISTANT	<input type="checkbox"/>	10000094	Kimery, Michele M	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10002236	Thomas, Valerie

If the employee has no pending time sheet(s) for the original position, one row, with blank approver fields, will appear on the setup page.

b. *Department Change* – the setup page will show the original position information for the ‘former’ department only if the employee has a pending time sheet within the original department. This record will display (PREV) in the name field (see screenshot below).³ If there are no pending time sheets, the employee position information will no longer appear on the former department’s setup page.

<input type="checkbox"/>	10345	Human Resources	Wardell, Jill Weinknecht (PREV) ³	10013282	MANAGER	<input type="checkbox"/>	10001470	Sanders, Rochelle Y	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10002236	Thomas, Valerie
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c. *Title & Department Change* – the setup page for the ‘former’ department will show the original employee position and approver information only if the employee has a pending time sheet with the former department. This record will display (PREV) in the name field.⁴

<input type="checkbox"/>	10345	Human Resources	Pitts, Sheila A (PREV) ⁴	10003368	PAY PROC ASSOC	<input type="checkbox"/>	10001494	Johnson, Kia Renee	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10000894	Drouillard, Lisa D.
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If the employee has no pending time sheets with the former department, the original row for the employee will no longer appear on the setup page for the former department. Instead the new department will see a row for the employee with blank approver fields. This is an indication to the Payroll Preparer to designate the primary and alternate time sheet approvers for the employee.

<input type="checkbox"/>	10303	Bookstore	Pitts, Sheila A	10003538	MANAGER	<input type="checkbox"/>	<input type="text"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
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If an employee has changed positions but not the department, and the employee has no pending time sheets for the former position, the setup page will reflect a row with the new position information and blank approver fields. The Payroll Preparer will need to designate the primary and alternate approver for the new employee position. If the employee has pending time sheets for the old position, then the setup page will continue to display the former position as an additional row; however, this row will be marked as (PREV) in the name field. This row will remain on the setup page until the time sheet has been processed or purged from the system.

<input type="checkbox"/>	10303	Bookstore	Wardell, Jill Weinknecht	10013282	MANAGER	<input type="checkbox"/>	<input type="text"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
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ADDENDUM

SEARCH BY DEPARTMENT:

1. Enter the department ID and click tab or press enter and the department description will appear at the top.
2. Click on Search to retrieve the employees within the department.

[Favorites](#) | [Main Menu](#) > [UMBC Time and Leave Processing](#) > [Employee Time Sheets](#) > [Employee-Supervisor/Alt Setup](#)

Time Sheet Relationship SetUp

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
10345	Human Resources							

Select Function:

Employee Relationship Mapping

Dept. ID	Description	Empl ID	Name	Position Nbr.	Title	On Demand (Y/N)	Approver Position Nbr.	Name	Send Alerts	Send Alerts	Alternate Position Nbr.	Name
<input type="checkbox"/>	10345	Human Resources	Kimery, Michele M	10000094	EXEC ADM ASST I	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	10345	Human Resources	Sanders, Rochelle Y	10001470	DIRECTOR	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	10345	Human Resources	McNamara, Sherrell J	10001553	MANAGER	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		

MASS UPDATE:

There may be a need to update the reports to information via a mass update. Multiple employees may have the same primary and/or alternate supervisor (time sheet approver). To enter a mass update, do the following:

1. Once the employee listing has been retrieved, click on the 'Select All' button. This will place a checkmark in the checkbox next to the 'Dept ID' field. The checkmark is identifying all of the records to be updated.
2. Click on the dropdown box for the 'Select Function' field. Click on the role to be updated.

Time Sheet Relationship Setup

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
10345	Human Resources							

Search Clear Search Select All Deselect All Select Function

1 Update Primary Approver
2 Update Alternate Approver

Employee Relationship Mapping

Dept. ID	Description	Empl ID	Name	Position Nbr.	Title	On Demand (Y/N)	Approver Position Nbr.	Name	Send Alerts	Send Alerts	Alternate Position Nbr.	Name
<input type="checkbox"/>	10345	Human Resources	Kimery, Michele M	10000094	EXEC ADM ASST I	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	10345	Human Resources	Sanders, Rochelle Y	10001470	DIRECTOR	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	10345	Human Resources	McNamara, Sherrell J	10001553	MANAGER	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		

- After the role has been selected, the 'Position Number' field will appear. Click on the magnifying glass to expand the search criteria to locate the supervisor's (approver's) information (refer to bullet #6 of the Set Up instructions).

Favorites | Main Menu > UMBC Time and Leave Processing > Employee Time Sheets > Employee-Supervisor/Alt Setup

Time Sheet Relationship SetUp

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
10345	Human Resources							

Search Clear Search Select All Deselect All Select Function 2 Update Alternate Approver Position Number

Employee Relationship Mapping

Dept. ID	Description	Empl ID	Name	Position Nbr.	Title	On Demand (Y/N)	Approver Position Nbr.	Name	Send Alerts	Send Alerts	Alternate Position Nbr.	Name
<input checked="" type="checkbox"/>	10345	Human Resources	Kimery,Michele M	10000094	EXEC ADM ASST I	<input type="checkbox"/>	10002236	Valerie Thomas	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	10345	Human Resources	Sanders,Rochelle Y	10001470	DIRECTOR	<input type="checkbox"/>	10002236	Valerie Thomas	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	10345	Human Resources	McNamara,Sherrell J	10001553	MANAGER	<input type="checkbox"/>	10001470	Rochelle Sanders	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	10345	Human Resources	Allen,Courtney W	10002185	HUMAN RES SPEC I	<input type="checkbox"/>	10001470	Rochelle Sanders	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

- Once the supervisor has been selected, the position number will populate in the 'Position Number' field and a yellow lightning bolt will appear.
- Click on the lightning bolt and all of the checked rows will update with the designated approver. Click 'Save'.

Favorites | Main Menu > UMBC Time and Leave Processing > Employee Time Sheets > Employee-Supervisor/Alt Setup

Time Sheet Relationship SetUp

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
10345	Human Resources							

Search Clear Search Select All Deselect All Select Function 2 Update Alternate Approver Position Number 10001694 ⚡

Employee Relationship Mapping

Dept. ID	Description	Empl ID	Name	Position Nbr.	Title	On Demand (Y/N)	Approver Position Nbr.	Name	Send Alerts	Send Alerts	Alternate Position Nbr.	Name
<input checked="" type="checkbox"/>	10345	Human Resources	Kimery,Michele M	10000094	EXEC ADM ASST I	<input type="checkbox"/>	10002236	Valerie Thomas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10001694	Lynne Schaefer
<input checked="" type="checkbox"/>	10345	Human Resources	Sanders,Rochelle Y	10001470	DIRECTOR	<input type="checkbox"/>	10002236	Valerie Thomas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10001694	Lynne Schaefer
<input checked="" type="checkbox"/>	10345	Human Resources	McNamara,Sherrell J	10001553	MANAGER	<input type="checkbox"/>	10001470	Rochelle Sanders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10001694	Lynne Schaefer
<input checked="" type="checkbox"/>	10345	Human Resources	Allen,Courtney W	10002185	HUMAN RES SPEC I	<input type="checkbox"/>	10001470	Rochelle Sanders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10001694	Lynne Schaefer

SEARCH BY TIME SHEET APPROVER:

A Payroll Preparer or department may have a need to view all of the employees that report to a specific approver (supervisor). To accommodate this, the following steps are required:

1. Click on the magnifying glass for the “Approver Position Nbr” field for primary approver. If reviewing for an alternate supervisor, click on the magnifying glass for “Alternate Position Nbr”.

Time Sheet Relationship Setup

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Search Clear Search Select All Deselect All Select Function

2. A dropdown listing of the approvers will appear. To narrow the search, enter the approver’s name, empl ID or position number. Once the approver has been located, click on any of the fields for the approver’s information.

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Time Sheet Relationship Setup

Search Criteria

Look Up Approver Position Nbr

Position Number: begins with
Empl ID: begins with
Last Name: begins with
Name: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Position Number	Description	Empl ID	Last Name	Name
10000019	COORDINATOR		SOUDER	David Souder
10000039	ASSOC PROF&CHPRSN		GRABILL	Vincent Grabill
10000045	LIBRARIAN III		SIPE	Vicki Sipe
10000075	ASSOC PROF & DIR		LOVIGLIO	Jason Loviglio
10000078	RESEARCH PROF		JOHNSON	Bruce Johnson
10000079	ASSOCIATE VICE PRESIDENT		LEISEY	Kimberly Leisey
10000094	EXEC ADM ASST I		KIMERY	Michele Kimery
10000112	UNIV COUNSEL		GLEASON	David Gleason

- The approver's position number and name will appear in the search criteria section. Then click on the Search button.

Favorites | Main Menu > UMBC Time and Leave Processing > Employee Time Sheets > Employee-Supervisor/Alt Setup

Time Sheet Relationship SetUp

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	10001553	Sherrell McNamara	<input type="text"/>	<input type="text"/>

Search Clear Search Select All Deselect All Select Function

- The search will produce a listing of all employees who are recorded in the ETS (electronic time sheet) Employee/Supervisor Setup page as reporting to the approver specified in the search criteria.

Favorites | Main Menu > UMBC Time and Leave Processing > Employee Time Sheets > Employee-Supervisor/Alt Setup

Time Sheet Relationship SetUp

Search Criteria

Dept. ID	Description	Empl ID	Name Search	Last Name Search	Approver Position Nbr	Approver Name	Alternate Position Nbr	Alternate Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	10001553	Sherrell McNamara	<input type="text"/>	<input type="text"/>

Search Clear Search Select All Deselect All Select Function

Employee Relationship Mapping

Dept. ID	Description	Empl ID	Name	Position Nbr.	Title	On Demand (Y/N)	Approver Position Nbr.	Name	Send Alerts	Send Alerts	Alternate Position Nbr.	Name
<input type="checkbox"/>	10345	Human Resources	Rollins, Denise Nadine	10001435	HUMAN RES SPEC I	<input type="checkbox"/>	10001553	Sherrell McNamara	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10002236	Valerie Thomas

Save