Banner Human Resources
Managing Time Entry
Training Workbook

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Revision History Log

Publication Date	Summary
April 2008	New version that supports Banner Human Resources 8.0 software.
November 2010	Updated version that supports Banner Human Resources 8.4 software.
March 2011	Updated version that supports Banner Human Resources 8.5 software.
October 2011	Modified version to support LCTCS End User Training.

Table of Contents

Introduction

Course goal

The goal of this workbook is to provide you with the knowledge and practice to access the Web for time entry functions at your institution.

Course objectives

In this course you will learn how to

- enter the appropriate data on the forms used to provide access to time entry on the Web
- describe the approval routing process
- enter time through the Web
- approve time through the Web
- set up proxy information through the Web.

Intended audience

Human Resources Office Administrators and Staff.

Prerequisites

To complete this course, you should have

- completed the Training Services' web-based training (WBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system.

Process Introduction

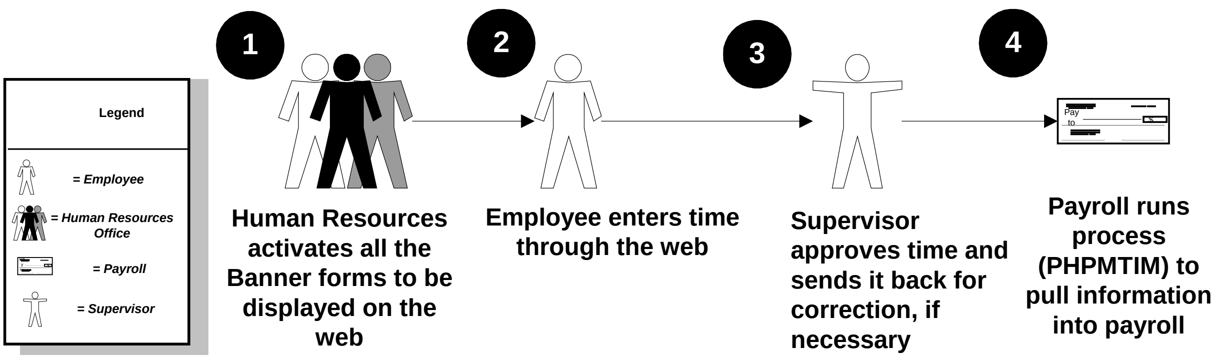
Introduction

The Banner Web Time Entry process allows employees to enter their time on the Web. The Human Resources Office is responsible for setting up the rules for entering time through the Web and then monitoring that function. Then,

- employees enter time through the Web.
- supervisors approve time or return timesheets for correction, if necessary.

Flow diagram

This diagram highlights the processes used to enter and approve time through the Web.



What happens

The stages of the process are described in this table.

Stage	Description
Human Resource Office	
1	Human Resources activate all the Banner forms to be displayed on the Web.
2	Employee enters time through the Web.
3	Supervisor approves time or sends it back for correction, if necessary.
4	Payroll runs the Mass Time Entry Process (PHPMTIM) to pull information into PHAHOUR, the On-Line Time Entry form.

Overview of Time Entry and Approvals Processing

Entering time for approval

Through the Web, an employee can start time entry or choose to continue entering data for a pay period that is in process. Once the system determines that a payroll requires entry, an initial extract process gathers the default information for the pay period. It does not, however, lock the employee's job and deduction records as the PHPTIME process does; that is, the records can still be updated after this process is complete. Each time a time sheet or leave request is subsequently accessed on the Web or PHATIME, it is automatically populated with any previously entered data.

An employee can enter time on a time sheet for a particular pay period any day during the time frame established for time entry for that period via the rules on PTRPICT and PTRCALN. During each time entry session, time can be reported for a single day or for several days. Time can be entered throughout the time entry period. After completing a time sheet, the employee or departmental timekeeper can submit it for approval. Approvers can choose to update or change employee time.

It should be noted that all employees will be required to complete a time sheet and that a time sheet is not marked as submitted until it is opened, certified by the employee with his/her PIN number and sent to the supervisor for approval. A positive time entry employees with no hours for the pay period open and certify his/her timesheet with a comment that no hours were worked to aid in verification that he/she did not just forget to enter time.

Return for correction

If a time sheet was entered on the Web, the action taken depends on the setting of a rule on the Position Control Installation Rule Form (NTRINST). The time sheet either will be returned for correction to the employee on the Web. Only in the event of an emergency where an employee is incapacitated and therefore unable to submit a timesheet will the approver submit the timesheet on the employee's behalf. As time entry is web based, entry of time does not require the employee to physically be at the place of employment in order to submit time. An approver can make changes to the hours entered by the employee and can then return the time sheet to the employee or department administrator.

Notes: There is no notice to the employee or originator that the timesheet was returned for correction via the web. If the approver believes the time sheet or leave request is incorrect and he/she is not authorized by organizational rules to change the time, he/she can return the time sheet for correction. In any case where the time sheet is returned or altered a comment is required in the comment

field. The approver can send an email or phone the employee that his/her timesheet has been returned for corrections.

Transaction status

Time entered over the Web is always associated with a transaction status. The transaction status represents the stage of a time transaction is as it moves from time entry through the approval process.

Processing of approved time sheets

All time sheet information entered via the Web is stored in time entry tables. An approval queue must be set up before time can be entered via the Web. After a time sheet is approved, the Mass Time Entry Process (PHPMTIM) moves the data from the Web time entry tables into the Mass Time Table (PHRMTIM) and processes the time (using various edits) and places it into the payroll history tables with the appropriate disposition. This data then continues through the normal payroll processing.

Time Entry via Banner Self-Service

Section goal

The goal of this section is to explain the day-to-day procedures for entering time through the Web application at your institution.

Objectives

In this section you will learn how to

- describe the approval routing process
- enter time through the Web
- enter leave time taken
- view pay information via Banner Self-Service
- view tax forms via Banner Self-Service
- view job summary information via Banner Self-Service
- approve time through the Web
- set up proxy information through the Web.

Outline of Approval Routing Process

Approval process

Multiple routing processes can be set up within an employee class, organization code, position, and/or an employee's multiple jobs. The following table details how the approval process uses the multiple set up forms.

1. Originator submits time for approval through the Web.

2. A routing queue is established on NTRRQUE, NBAJQUE, or NBAPOSN. These forms list approvers assigned to approve time transactions belonging to a certain position or an organization at your institution. Approvers are listed in the sequence that they are notified to approve a time transaction.

System checks NBAJQUE for routing queue for the employee's position.

- If no values exist for the position on NBAJQUE, the system checks NTRRQUE for the employee's position.
- If no values exist for the position on NTRRQUE, the system checks NTRRQUE for an organization code set up.
- If no values exist on NTRRQUE for organization code, the system looks for a value in the **Reports To** field on NBAPOSN.
- If the **Reports To** field is not populated, the system displays an error message. A routing must be created before the entry can be submitted.
- If no routing queue is found during the extract process, error messages are generated. On the Web, the employee receives a message to contact the payroll office. The time transaction cannot be extracted without a routing queue. The error messages can be seen on the Payroll Error Display Report (PHRDERR) or the Pay History Display Errors Form (PHIDERR).

3. When an approver needs to approve transactions, he/she receives electronic notification during his/her sign on to Internet Native Banner (INB) to access the Human Resources forms. The message *You have Electronic Approvals Transactions. Do you wish to view?* appears. You select *Time Sheets/Leave* to view time transactions which takes you to the Department Approval Summary Form (PHADSUM) to approve time sheets.

Note: There is no notification of pending approvals when a person logs onto Self Service Banner (SSB). An email or a phone call will need to be sent to the employee.

Once you approve the transactions, then the time moves down the queue to the next approver (he/she also receives the electronic message) until all the approvers have approved the transactions. Although multiple approval levels is not the recommended method, it will be allowed with the understanding that additional time will not be built into the process to accommodate this institutional choice.

Note: Extract processes can only occur via the Web after the close of the pay period. Once all approvers submit approved records, Payroll is able to run the Mass Time Entry Process (PHPMTIM).

Time reporting functions

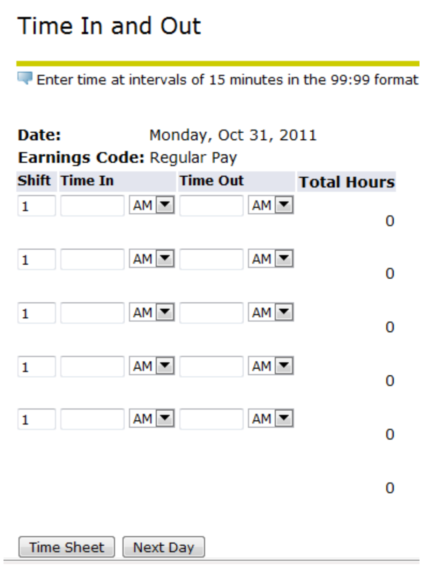
Banner Web Time Entry enables employees to report their time on the Web and to submit the time transactions (time sheets) directly from the Web to the Banner Human Resources system.

The following functions are available for entry:

- Click on Save to enter the next value
- Click on Copy to copy the value to other days

Time In / Out functions

Some employees will be required to enter their Time In/Out when reporting time. When entering time, the timesheet will prompt affected employees to enter their start/stop time. Employees should record when they start working, when they stop for lunch, then their return from lunch, and when they leave work at the end of the workday.



When reporting time in/out, please keep these rules in mind:

- Time must be entered in 15-minute increments
- Both Time In and Out must be entered
- The Next Day option saves your record and takes you to the next day for entry

- The Add New Line option adds another entry line to the page
- The Delete option removes the entry from the day
- The Previous Menu option displays the Time Sheet page; the hours entered on the Time In and Out page display in the Summary area; the hours are broken down by shift

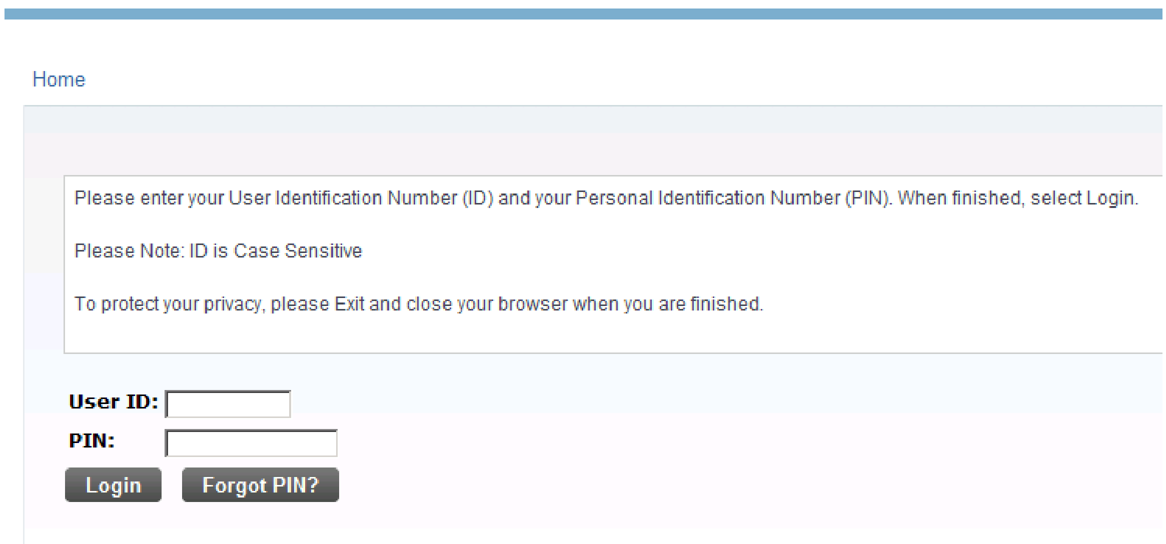
Superuser status

Superusers can submit any leave report or time sheet with an *In Progress* status when the time/leave entry period is open.

A superuser can also extract any time sheet when the leave/time entry period is open. If the entry period has not yet opened, then no one can extract a time sheet.

These capabilities allow superusers to have flexibility in handling time sheets when an employee is unable to extract or submit their timesheet on time. If the superuser knows that the employee won't be able to extract or submit their time sheet before the entry period closes, he/she won't have to wait for the entry period to close to process a time sheet for the employee.

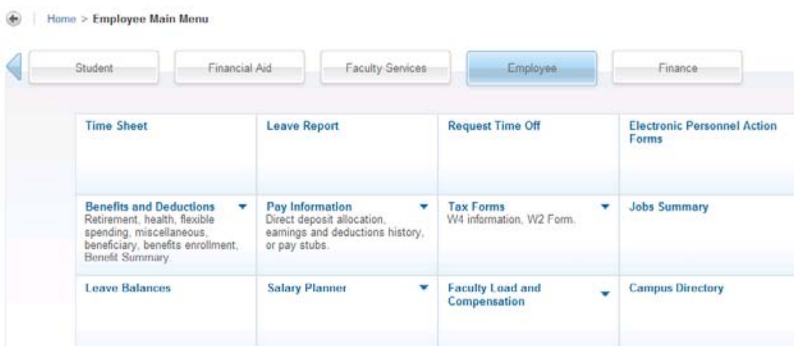
Screen image



Steps

Follow these steps to log into Self-Service and enter time through the Web.

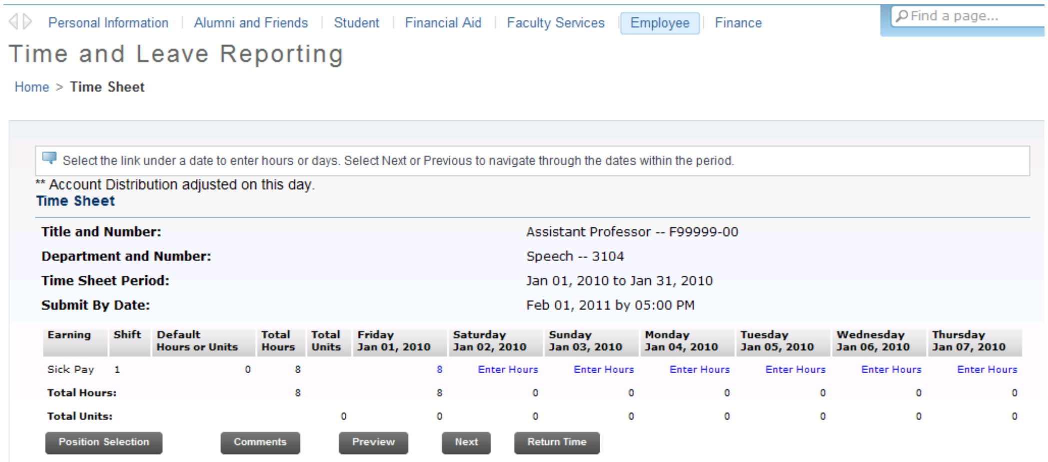
1. Open a browser and enter the URL as provided by your institution.
2. Access the **Enter Secure Area** option.
3. Enter your ID in the **User ID** field.
4. Enter your PIN in the **PIN** field.
5. Click the **Login** button.
6. From the main page, click the **Employee** tab.
7. Click the **Time Sheet** link.



8. Select the radio button next to **Access my Time Sheet**.
9. Click the **Select** button.

10. Select the radio button next to the position that you want to enter time.

Note: You can only select one position at a time. If you have multiple positions, enter time in one position, then return to this page and click on the Position Selector to select the next position. Additionally, if you have assignments at multiple institutions you will access one institution and complete your time entry. You will then access the next institution and complete time entry for that assignment. You will not be able to see all assignments across multiple institutions in one session.


Personal Information | Alumni and Friends | Student | Financial Aid | Faculty Services | Employee | Finance

Find a page...

Time and Leave Reporting

Home > Time Sheet

Select the link under a date to enter hours or days. Select Next or Previous to navigate through the dates within the period.

** Account Distribution adjusted on this day.

Time Sheet

Title and Number:	Assistant Professor -- F99999-00
Department and Number:	Speech -- 3104
Time Sheet Period:	Jan 01, 2010 to Jan 31, 2010
Submit By Date:	Feb 01, 2011 by 05:00 PM

Earning	Shift	Default Hours or Units	Total Hours	Total Units	Friday Jan 01, 2010	Saturday Jan 02, 2010	Sunday Jan 03, 2010	Monday Jan 04, 2010	Tuesday Jan 05, 2010	Wednesday Jan 06, 2010	Thursday Jan 07, 2010
Sick Pay	1	0	8		8	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Total Hours:			8		8	0	0	0	0	0	0
Total Units:				0	0	0	0	0	0	0	0

Position Selection | Comments | Preview | Next | Return Time

11. Click on the **Time Sheet** button.

The Time Sheet page displays. All days of the pay period are displayed regardless of the time entry period defined on PTRCALN. If the time period extends beyond the display area, click on the Next button to display information for the future days.

If the record is set up as Pay Period Time Sheet entry method, all earnings codes with a Time Sheet Sequence code on PTRECLS are listed.

If the record is set up as Exception Time Entry, all earnings codes, except Regular Pay, with a time sheet sequence code on PTRECLS are listed.

12. To begin, click the **Enter Hours** link, under the date where you want to enter time, that corresponds with the date and type of leave for which you want to enter time. Click **Next/Previous** button for more dates within the period.

Note: A warning message ‘Possible Insufficient Leave Balance’ will be displayed when exception time is entered in excess of the employee’s current leave balance.

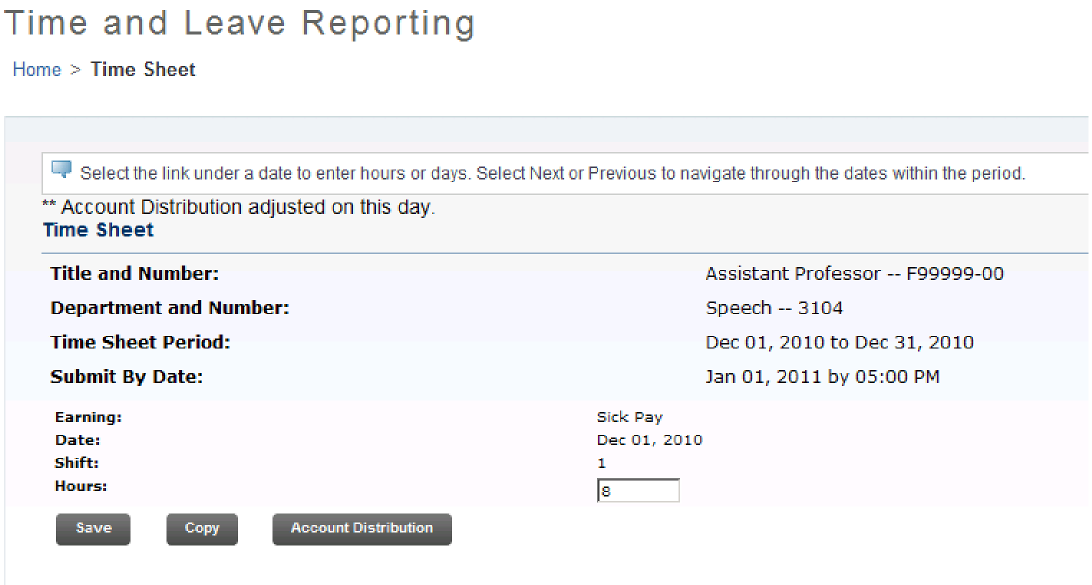
13. Enter the hour’s value in the **Hours** field.

14. Click the **Save** button.

Copying time

15. To copy hours to other days or to the end of the pay period, click the **Copy** button.

    Note: If you want to copy weekend dates, be sure to check **Include Saturday(s)** or **Include Sunday(s)**. To copy individual dates, click the checkboxes under the dates. If you select the same date that you are copying from, your hours will be deleted.



16. Click **Copy** button.

17. Click the **Time Sheet** button at the bottom of the page to return to the Time Sheet page and review your hours entered.

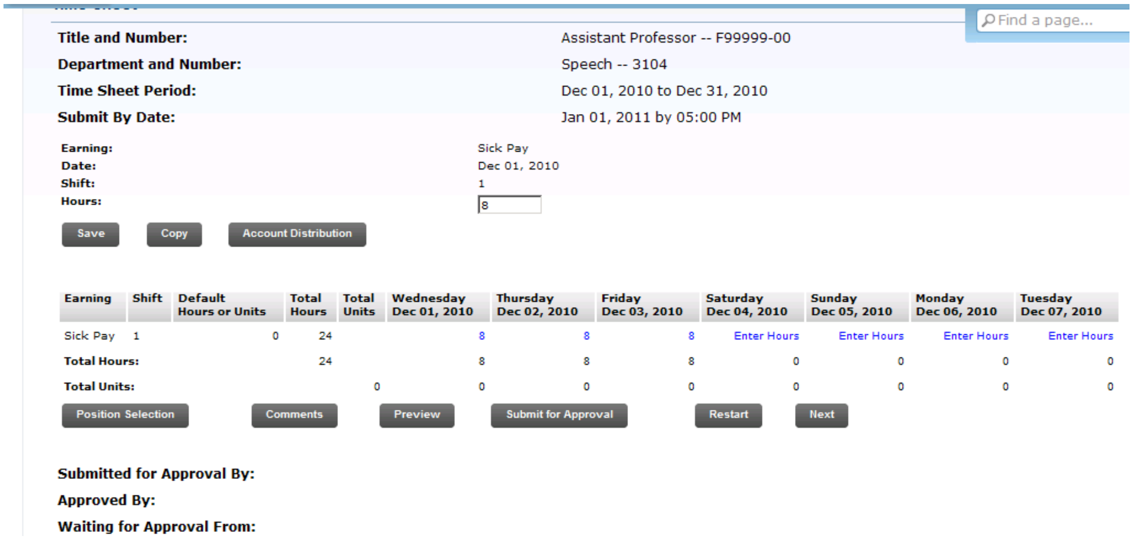
    Note: As an option, you can enter Comments. Comments entered on the Web can be viewed on PHATIME PHADSUM, and when approving time via the Web.

18. Click the **Comments** button to enter your comments in the text box.

19. Click the **Save** button.

20. Click the **Previous Menu** button to return to the Time Sheet page.

Reviewing your time



21. Click the **Preview** button to access the Preview page to review your time entered.

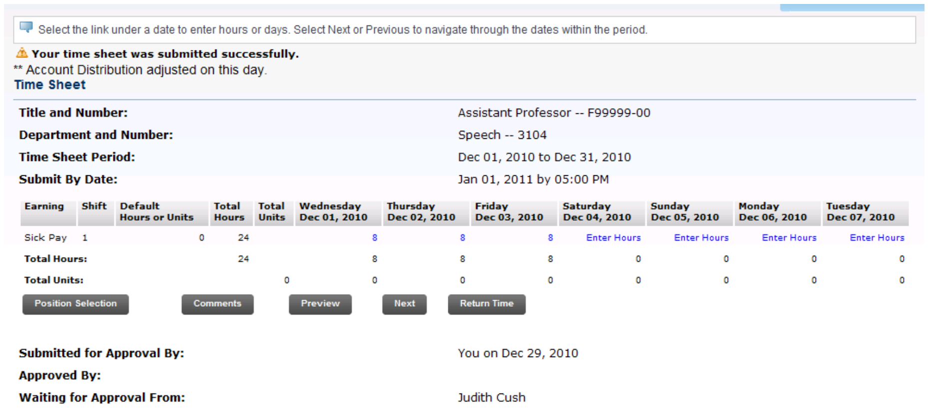
    Note: The Preview page summarizes all of the information entered. You may want to print it if you would like a hard copy of what you entered.

22. Click the **Restart** button to remove all entry done for the pay period.

23. Click on the **Submit** button to submit the time for approval.

    Note: You can **Exit** without submitting time for approval. This leaves the record in an "In Progress" status and is not submitted for approval.

    If changes are necessary after the timesheet has been submitted, click the **Return Time** button which will allow the employee to make the appropriate changes. The employee cannot make corrections once the timesheet has been submitted for approval. If the timesheet has been submitted for approval, contact the approver who will return the timesheet to an employee for correction.


Select the link under a date to enter hours or days. Select Next or Previous to navigate through the dates within the period.

Your time sheet was submitted successfully.

** Account Distribution adjusted on this day.

Time Sheet

Title and Number:	Assistant Professor -- F99999-00
Department and Number:	Speech -- 3104
Time Sheet Period:	Dec 01, 2010 to Dec 31, 2010
Submit By Date:	Jan 01, 2011 by 05:00 PM

Earning	Shift	Default Hours or Units	Total Hours	Total Units	Wednesday Dec 01, 2010	Thursday Dec 02, 2010	Friday Dec 03, 2010	Saturday Dec 04, 2010	Sunday Dec 05, 2010	Monday Dec 06, 2010	Tuesday Dec 07, 2010
Sick Pay	1	0	24		8	8	8	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Total Hours:			24		8	8	8	0	0	0	0
Total Units:				0	0	0	0	0	0	0	0

Position Selection Comments Preview Next Return Time

Submitted for Approval By:	You on Dec 29, 2010
Approved By:	
Waiting for Approval From:	Judith Cush

24. The time sheet must be certified before it can be submitted for approval. Enter your PIN and click **OK** on the Certification page.

25. If you have additional assignments at this institution or pay periods on which to enter time, click on the **Position Selection** button.

26. Click the **Exit** button when you have all time entered.

27. The status for the record is set to *Pending* when the employee exits the Time Entry page and places the data into the approval queues.

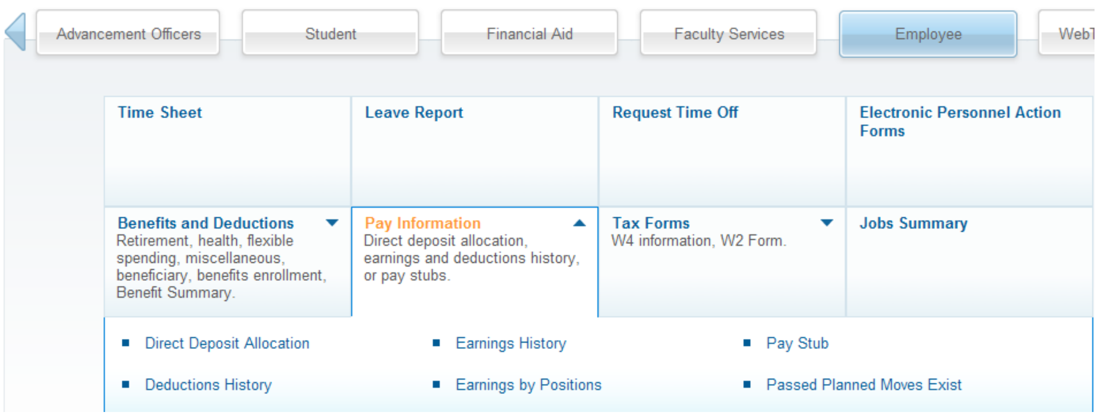
Viewing Pay Information via Banner Self-Service

General format of the Pay Information pages

The Pay Information function enables employees to view their payroll data. The following options appear on the menu for this function:

- Direct Deposit Allocations
- Earnings History
- Pay Stub
- Deductions History
- Earnings by Positions

Screen image



Direct Deposit Allocation

The Direct Deposit Allocation page displays a list showing how your direct deposit pay is distributed. The following is listed for each.

- Bank or credit union into which the money is deposited
- Amount or percentage deposited per pay into that bank or credit union
- Type of account into which the money is placed

Steps

Follow these steps to view the process.

1. Select **Direct Deposit Allocation** from the Pay Information menu.
2. View your direct deposit information.

   Note: A message will display if you do not have any direct deposits.

Earnings History

The Earnings History option allows you to view your earnings data.

Screen image

Steps

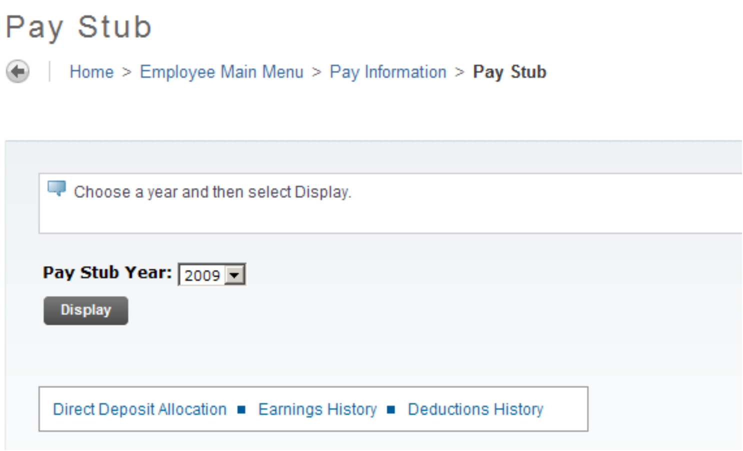
Follow these steps to view the process.

1. From the Pay Information menu, select **Earnings History**.
2. Enter the date information and select the **Display** button.
3. View your earnings history.
4. Click the type of pay to view the detail of your earnings.

Pay Stub

The Pay Stub page allows you to view your general pay information for a particular year and see detailed data for a particular pay period.

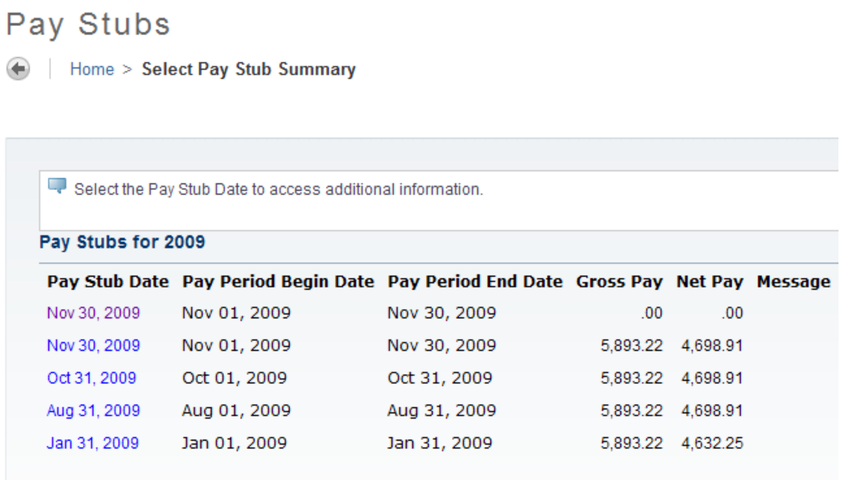
Screen image



Steps

Follow these steps to view the pay stub.

1. From the Pay Information menu, select **Pay Stub**.
2. Enter the year and select the **Display** button.
3. View your pay information.


Pay Stubs

Home > Select Pay Stub Summary

Select the Pay Stub Date to access additional information.

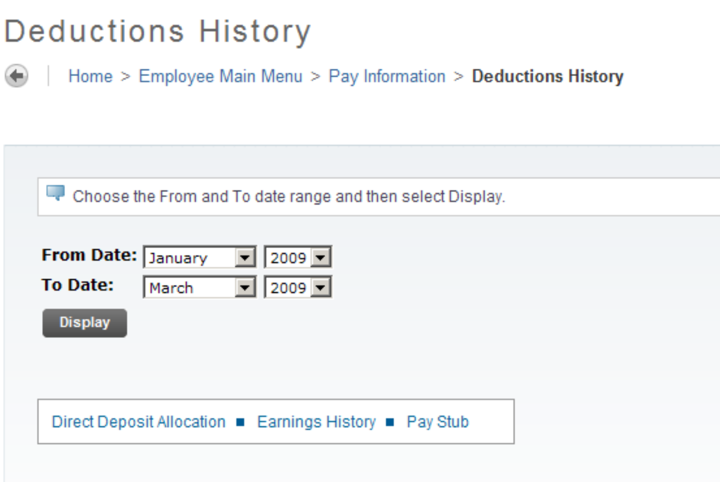
Pay Stubs for 2009

Pay Stub Date	Pay Period Begin Date	Pay Period End Date	Gross Pay	Net Pay	Message
Nov 30, 2009	Nov 01, 2009	Nov 30, 2009	.00	.00	
Nov 30, 2009	Nov 01, 2009	Nov 30, 2009	5,893.22	4,698.91	
Oct 31, 2009	Oct 01, 2009	Oct 31, 2009	5,893.22	4,698.91	
Aug 31, 2009	Aug 01, 2009	Aug 31, 2009	5,893.22	4,698.91	
Jan 31, 2009	Jan 01, 2009	Jan 31, 2009	5,893.22	4,632.25	

4. Click a **Pay Stub Date** link to view the details for the specific pay period.
Deductions History

The Deductions History page allows you to view deduction information for a range you specify.

Screen image



Steps

Follow these steps to view the Deduction History

1. From the Pay Information menu, select **Deductions History**.
2. Enter the date range and select the **Display** button.
3. Click a **Deduction Type** link to view the detail.


Deductions Summary

Home > Deductions Summary

Select a deduction to access history information.

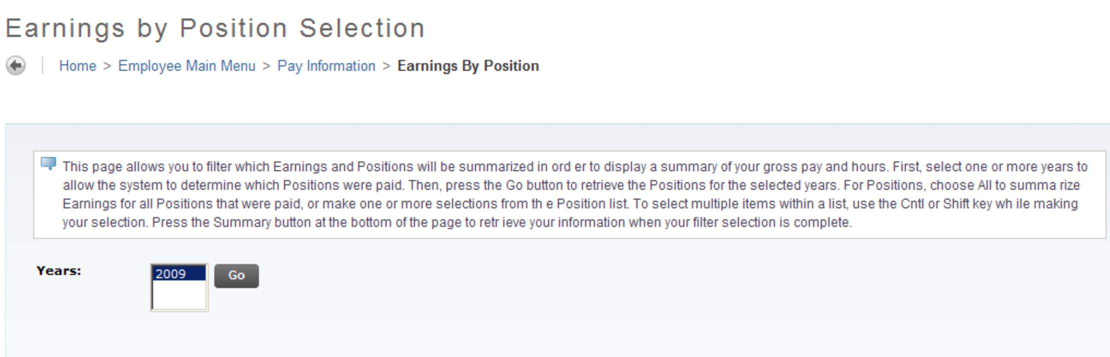
Deduction History from January 2009 to March 2009

Deduction Type	Employee Deduction	Employer Deduction
Federal Tax	591.28	.00
Fica Medicare	85.45	85.45
Fica Old Age	350.91	350.91
Pre Tax Blue Cross/Blue Shield	208.33	150.00
Pretax Dental Insurance	25.00	16.67

Earnings by Position

The Earnings by Positions page allows employees to filter which Earnings and Positions will be summarized in order to display a summary of their gross pay and hours.

Screen image



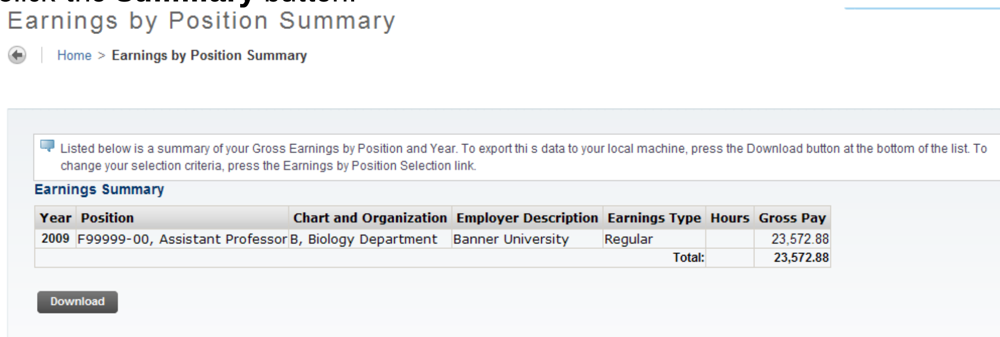
Steps

Follow these steps to view the Earnings by Position.

1. From the Pay Information menu, select **Earnings by Position**.
2. Select the year(s) in the Years field.
3. Click the **Go** button.
4. From the pull-down list corresponding to the Position field, select one or more

positions or All in the **Positions** field.

5. Click the **Summary** button.



6. On the Earning by Position Summary page, click the **Download** button to download a position summary Excel file.

Viewing Tax Forms via Banner Self-Service

General format of the Tax Forms pages

The Tax Forms page gives you access to your year-end tax statements. The following links are displayed:

- W4 Tax Exemptions or Allowances
- Electronic W-2 Consent
- W-2 Wage and Tax Statement
- W-2c Corrected Wage and Tax Statement
- T4 Statement of Remuneration Paid

W4 Tax Exemptions

The W4 Tax Employee Withholding Allowance Certificate page displays your W-4 Information (for US employees) as of today's date. There will be a link to a W-4 form which may be downloaded, completed and sent to Human Resources. The employee will not be allowed to update a W-4 through self-service. Government agencies may require centralized payroll to update W-4 withholding allowances known as a Lock-In Letter. Letters received by the college should forward those request to centralized payroll for entry. Employees will receive a letter from centralized payroll of the document received when the change will be effective, giving the employee ample opportunity to contact this agency, Human Resource representative will receive a copy of this notification.

Steps

Follow these steps to view and print a copy of the W4.

1. From the Tax Forms menu, select **W4 Tax Employee Withholding Allowance Certificate** link

2. View your tax information.

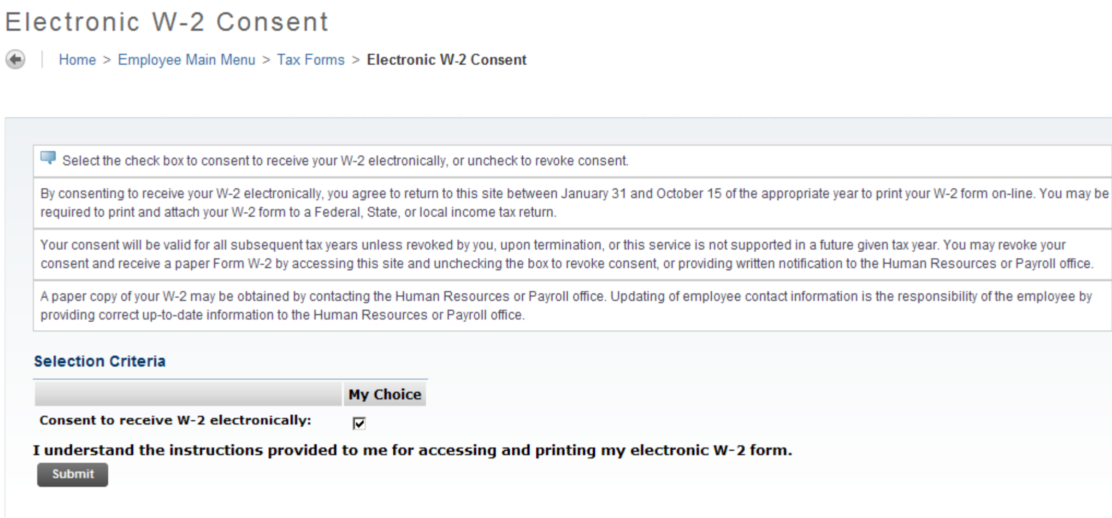
3. Click the **Print** button to print W-4 information.

Electronic W-2 Consent

Employees can confirm or revoke consent to receive their W-2 Wage and Tax Statement online through Employee Self-Service. Access this page by selecting the Electronic W-2 Consent menu item from the Tax Forms Menu. Indicate your consent and select the **Submit** button.

Note: Centralized Payroll should review and revise the delivered Info Text to accommodate their specific procedures to comply with IRS Regulations.

Screen image



Electronic W-2 Consent

Home > Employee Main Menu > Tax Forms > **Electronic W-2 Consent**

Select the check box to consent to receive your W-2 electronically, or uncheck to revoke consent.

By consenting to receive your W-2 electronically, you agree to return to this site between January 31 and October 15 of the appropriate year to print your W-2 form on-line. You may be required to print and attach your W-2 form to a Federal, State, or local income tax return.

Your consent will be valid for all subsequent tax years unless revoked by you, upon termination, or this service is not supported in a future given tax year. You may revoke your consent and receive a paper Form W-2 by accessing this site and unchecking the box to revoke consent, or providing written notification to the Human Resources or Payroll office.

A paper copy of your W-2 may be obtained by contacting the Human Resources or Payroll office. Updating of employee contact information is the responsibility of the employee by providing correct up-to-date information to the Human Resources or Payroll office.

Selection Criteria

	My Choice
Consent to receive W-2 electronically:	☑

I understand the instructions provided to me for accessing and printing my electronic W-2 form.

Submit

Steps

Follow these steps to complete the process.

1. Select Electronic W-2 Consent from the Tax Forms menu.
2. Click the **Consent to receive W-2 electronically** checkbox.

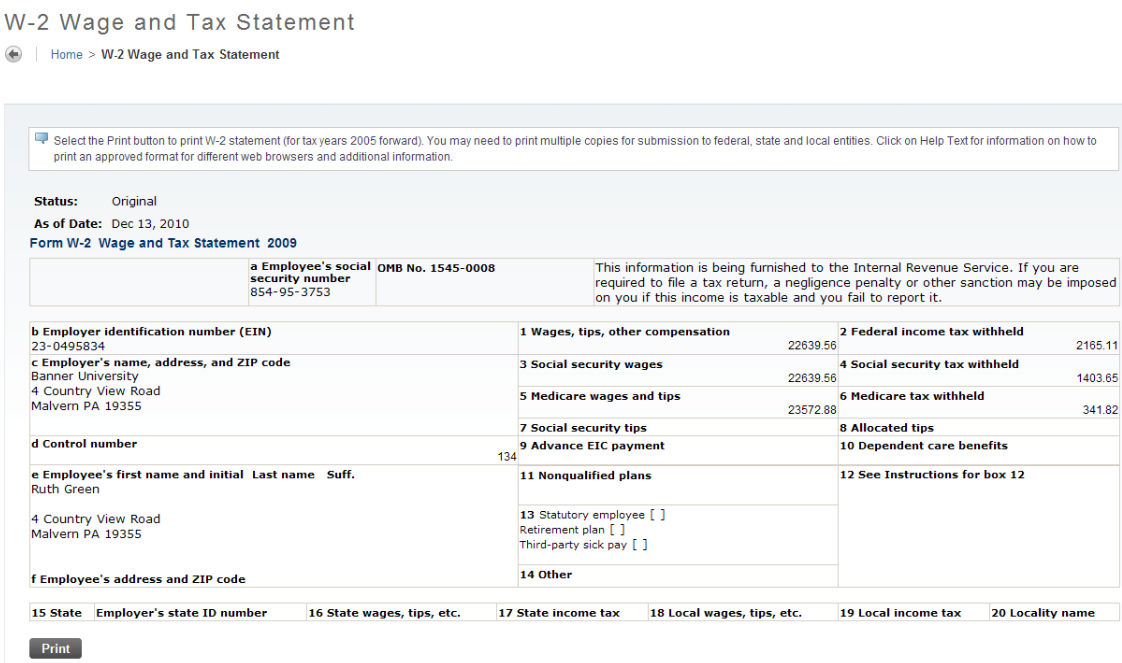
   Note: By giving your consent to receive this document electronically, you may not receive a paper copy from your institution.

3. Click the **Submit** button.

W-2 Wage and Tax Statement

The W-2 Year End Earnings Statement page allows you to access your W2 Statement (for US employees) for a specified year. The status and date at the top of the page lets you know if this is an Original issue W-2 or a Reissued W-2 along with the date it was created. You can use your browser and the Print button to print the W-2.

Screen image


W-2 Wage and Tax Statement

Home > W-2 Wage and Tax Statement

Select the Print button to print W-2 statement (for tax years 2005 forward). You may need to print multiple copies for submission to federal, state and local entities. Click on Help Text for information on how to print an approved format for different web browsers and additional information.

Status: Original

As of Date: Dec 13, 2010

Form W-2 Wage and Tax Statement 2009

	a Employee's social security number 854-95-3753	**OMB No. 1545-0008**	This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

b Employer identification number (EIN) 23-0495834	**1 Wages, tips, other compensation** 22639.56	**2 Federal income tax withheld** 2165.11
c Employer's name, address, and ZIP code Banner University 4 Country View Road Malvern PA 19355	**3 Social security wages** 22639.56	**4 Social security tax withheld** 1403.65
	5 Medicare wages and tips 23572.88	**6 Medicare tax withheld** 341.82
	7 Social security tips	**8 Allocated tips**
d Control number 134	**9 Advance EIC payment**	**10 Dependent care benefits**
e Employee's first name and initial Last name Suff. Ruth Green 4 Country View Road Malvern PA 19355	**11 Nonqualified plans**	**12 See Instructions for box 12**
	13 Statutory employee [ ] Retirement plan [ ] Third-party sick pay [ ]	
f Employee's address and ZIP code	**14 Other**	

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name

Print

Steps

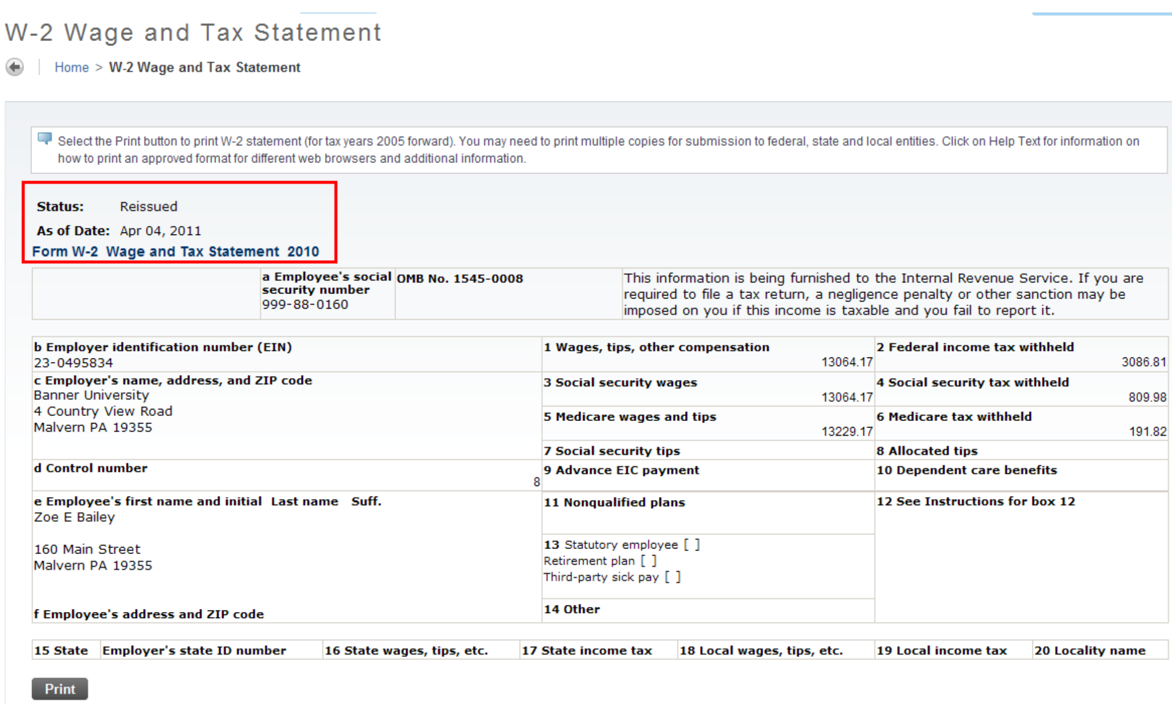
Follow these steps to view and print.

1. Select **W2 Wage and Tax Statement** from the Tax Forms menu.
2. Select the **Tax Year** for which you wish to review the W-2 statement.
3. Select your **Employer** or **Institution** from the corresponding pull-down list.
4. Click the **Display** button.
5. Select the **Print** button to print document.

W-2c Corrected Wage and Tax Statement

If your information provided by centralized payroll ~~your institution~~ to the government has been changed after it was submitted to the IRS, you can print a corrected W-2c Wage and Tax Statement. The **Status** field on the W-2 states it is reissued and the **As of Date** field displays the reissue date.

Screen image


W-2 Wage and Tax Statement

Home > W-2 Wage and Tax Statement

Select the Print button to print W-2 statement (for tax years 2005 forward). You may need to print multiple copies for submission to federal, state and local entities. Click on Help Text for information on how to print an approved format for different web browsers and additional information.

Status: Reissued

As of Date: Apr 04, 2011

Form W-2 Wage and Tax Statement 2010

a Employee's social security number 999-88-0160

OMB No. 1545-0008

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

b Employer identification number (EIN) 23-0495834

1 Wages, tips, other compensation 13064.17

2 Federal income tax withheld 3086.81

c Employer's name, address, and ZIP code
Banner University
4 Country View Road
Malvern PA 19355

3 Social security wages 13064.17

4 Social security tax withheld 809.98

5 Medicare wages and tips 13229.17

6 Medicare tax withheld 191.82

7 Social security tips

8 Allocated tips

d Control number 8

9 Advance EIC payment

10 Dependent care benefits

e Employee's first name and initial Last name Suff.
Zoe E Bailey

160 Main Street
Malvern PA 19355

f Employee's address and ZIP code

11 Nonqualified plans

12 See Instructions for box 12

13 Statutory employee [ ]
Retirement plan [ ]
Third-party sick pay [ ]

14 Other

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name

Print

Steps

Follow these steps to view and print.

1. Select **W-2c Corrected Wage and Tax Statement** from the Tax Forms menu.
2. Select the **Tax Year** for which you wish to review the W-2 statement.
3. Select your **Employer** or **Institution** from the corresponding pull-down list.
4. Click the **Display** button.
5. Select the **Print** button.
6. Select the **Print** option from the **File** menu of your web browser.

Viewing Job Summary via Banner Self-Service

Jobs Summary

The Jobs Summary option allows you to access information on all of the jobs that you have held at your institution.

Screen image

Steps

Follow these steps to view your jobs.

1. Select **Jobs Summary** from the Employee Services menu.

2. View your job summary information.

3. Click the **Job Title** link to view the details of that job.

Self Check

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

There is no way to fix your sheet if you entered your hours incorrectly.

True or False

Question 2

Changes to your record can be made after you submit it.

True or False

Question 3

The entry of comments is required.

True or False

Question 4

Under timesheets in the Employee section on the Web you can view the hours that you entered.

True or False

Answer Key

Question 1

There is no way to fix your sheet if you entered your hours incorrectly.

False. If time has not been submitted for approval, edit timesheet. If it has been submitted, contact the approver and he/she can adjust it or return it for correction

Question 2

Changes to your record can be made after you submit it.

False. Changes to your record can not be made after you submit it.

Question 3

The entry of comments is required.

True. Salaried employees not reporting exception hours shall enter a comment 'No Exception Hours This Pay Period' prior to submitting their timesheet for approval. Additionally, employees and managers can use it when they have a special note about time entry or if the timesheet is being returned.

Question 4

Under timesheets in the Employee section on the Web you can view the hours that you entered.

True

Approving Timesheets

Section goal

The goal of this section is to explain the day-to-day procedures for approving time entered through the Web application at your institution.

Objectives

In this section you will learn how to

- query time in Banner
- approve time via Banner Self-Service
- return a timesheet via Banner Self-Service.

Query Time using Banner

Introduction

You may query and review submitted time in Banner using the Electronic Approvals of Time Entry Form (PHATIME). This form allows the user to query and review all timesheets in the various transaction statuses (pending, in progress, approved, completed, error, or return for corrections) and the time entry method (web, department, or third-party) for which the employee submitted the time sheet. In addition, the approver may review the job information for each employee and the hours that were submitted for approval.

Banner form

Steps

1. Access the Electronic Approvals of Time Entry Form (PHATIME).
2. Click the **Time Entry Method** drop-down arrow located in the Key block.
3. Select a time entry method (e.g., *Web*).
4. Click the **Transaction Status** drop-down arrow.
5. Select a transaction status (e.g., *Pending*).
6. Type the payroll ID (e.g., *BW* for Biweekly) in the **Payroll ID** field. Or, click the **Payroll ID Search** icon to search for and select a payroll ID.
7. Type the payroll period you wish to query (e.g., *12*) in the **Payroll Number** field. Or, click the **Payroll Number Search** icon to search for and select a payroll period.
8. Click the **Next Block** icon.
9. Review the information in the Jobs and Time Entry blocks.
10. Click the **Exit** icon.

Approving Time through the Web

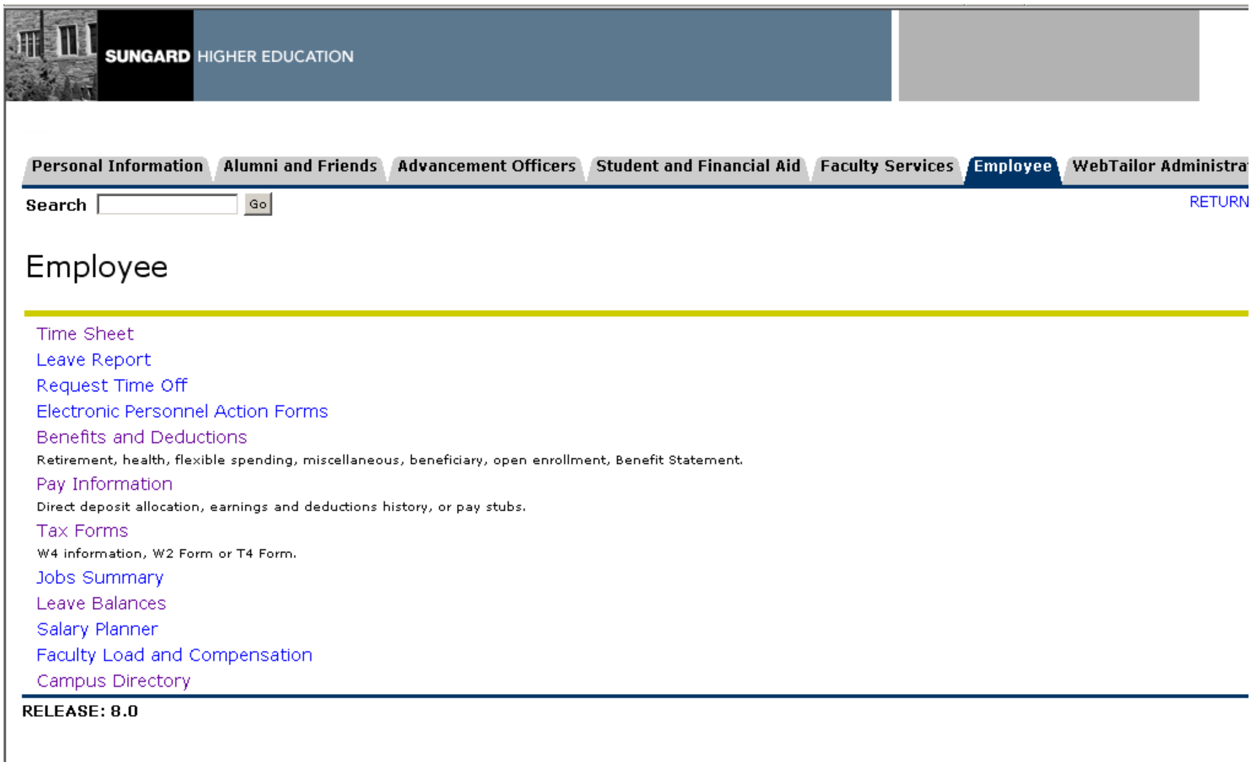
Introduction

Managers can approve employees’ time sheets from the Web.

The Web Time Approval pages are listed below:

- Time Sheet/ Proxy
- Approver Selection
- Approver Summary
- Superuser Selection
- Superuser Summary
- Approver Detailed
- Approver Comments
- Approver Change Pages

Screen image

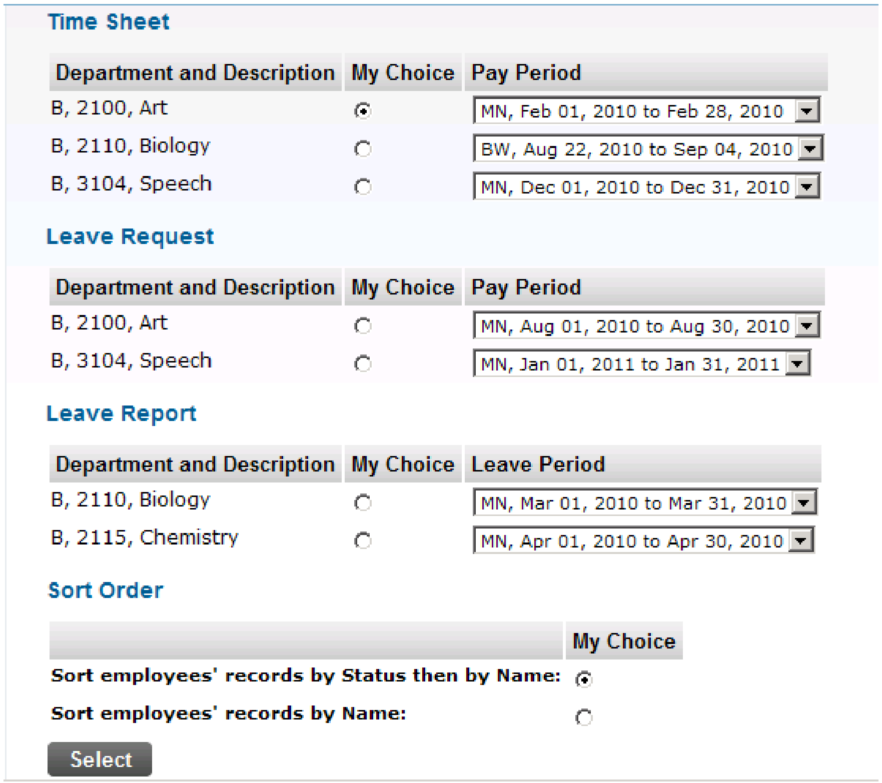


Steps

Follow these steps to view, enter, approve and return timesheets through Self-Service.

1. Open a browser and enter the URL as provided by your institution.
2. Access the **Enter Secure Area** option.
3. Enter the User ID in the **User ID** field.
4. Enter the PIN in the **PIN** field.
5. Click the **Login** button.
6. From the Main Menu, click the **Employee** tab.

Screen image



Please note that LCTCS is not using the Leave Request and Leave Report functionality shown in the screen print. Approvers would only see the Time Sheet and Sort Order headings.

7. From the Employee Services page, click the **Time Sheet** link.

8. From the Time Sheet page, select the radio button for **Approve/Acknowledge Time**.

9. Click the **Select** button.

10. To approve time sheets for a department, select the **Department and Description** radio button next to that department. To select all departments, click the **Approve All Departments** checkbox.

11. Click the **Pay Period** drop-down arrow and select a pay period.

12. To determine the sort order, select the appropriate radio button.

13. Click the **Select** button.

14. On the Department Summary page, click the **Approve, or FYI** checkbox next to the employee(s)' time you want to approve. Select an employee's name to access additional details.

15. Click **Leave Balances** link to view the employee's current leave balances.

16. Scroll to the bottom of the screen and click the **Save** button to approve the time sheet(s).

17. **Exit** the Web.

Approve time as a superuser (granting of security required)

Follow the steps to approve time as a superuser.

1. Open a browser and enter the URL provided by your institution.

2. Access the **Enter Secure Area** option.

3. Enter the user ID provided by your instructor in the **User ID** field.

4. Enter the PIN provided by your instructor in the **PIN** field.

5. Click the **Login** button.

6. From the Main Menu, click the **Employee** link.

7. From the Employee page, click the **Time Sheet** link.

8. From the Time Sheet page, select the radio button for **Approve/Acknowledge Time**.

9. Click the **Act as Superuser** checkbox.

10. Click **Select**.

11. Choose the appropriate combination of selection criteria and a sort order.

12. Click **Select**.

13. View transactions.

14. Approve/Acknowledge as appropriate.

15. **Exit** the Web.

NOTE: Superuser is a role which must be granted by the system administrator

Returning a Timesheet Using Banner Self-Service

Introduction

The Web Time Approval pages are listed below:

- Time Sheet/Proxy
- Approver Selection
- Approver Summary
- Superuser Selection
- Superuser Summary
- Approver Detailed
- Approver Comments
- Approver Change Pages

Steps

Follow these steps to process an incorrect time sheet.

1. Open a browser and enter the URL provided by your instructor.
2. Access the **Enter Secure Area** option.
3. Enter the user ID provided by your instructor in the **User ID** field.
4. Enter the PIN provided by your instructor in the **PIN** field.
5. Click the **Login** button.
6. From the Main Menu, select **Employee**.
7. From the Employee page, click the **Time Sheet** link.
8. From the Time Sheet page, select the radio button for **Approve/Acknowledge Time**.
9. Click on an employee name to view the details of their time sheet.

Employee fix time sheet:

10. If their time is entered incorrectly, click the **Return for Correction** button.

Approver fix time sheet (required method except in cases of incapacity of the employee is to return the time sheet to the employee to correct):

11. Click the **Change** button to change time detail.
12. Make appropriate changes.
13. Click the **Submit** button.
14. Approve the timesheet.
15. **Exit** the Web.

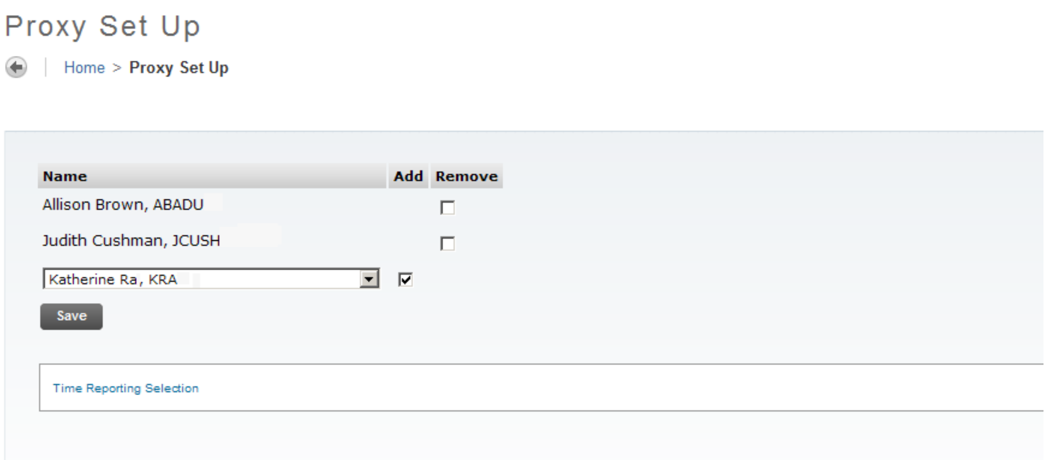
Identifying a Proxy

Introduction

Approvers can set up one or more proxies to approve time sheets in their absence. They can also choose to remove proxies if required.

Note: This link is available to only those employees who are designated as approvers of Web Time Entry.

Screen image



Steps

Follow these steps to add a proxy.

1. Access the Time Reporting Selection window.
2. Click the **Proxy Set Up** link at the bottom of the window.
3. Click the **Name** drop-down arrow and select a name.

   Note: This list is comprised from those Oracle IDs entered on the Enterprise Access Control Form (GOAEACC).

4. Click the **Add** checkbox.
5. Click the **Save** button.

6. The name is then alphabetically displayed under the **Name** column.

Note: To *remove* a proxy, select the **Remove** indicator corresponding to a displayed proxy and then select the **Save** button.

Self Check

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

Under timesheets in the employee section on the Web you can view the hours that you entered.

True or False

Question 2

Which transaction status is not available when querying and reviewing information in Electronic Approvals of Time Entry (PHATIME).

a) Pending and in progress

b) Approved and completed

c) Error or return for corrections

d) Not accepted and rejected

Question 3

An approved transaction status time sheet can be returned for corrections using Self Service.

Answer Key

Question 1

Under timesheets in the employee section on the Web you can view the hours that you entered.

True.

Question 2

Which transaction status is not available when querying and reviewing information in Electronic Approvals of Time Entry (PHATIME).

D) Not accepted and rejected. **The Electronic Approvals of Time Entry (PHATIME) allows the approver to query and review all time sheets in the various transactions statuses (pending, in progress, approved, completed, error or return for corrections) and what time entry method the employee submitted the time sheet.**

Question 3

An approved transaction status time sheet can be returned for corrections using Self Service.

False. **For a transaction to be returned for corrections, it must be in a pending status.**

Processing a Re-extract

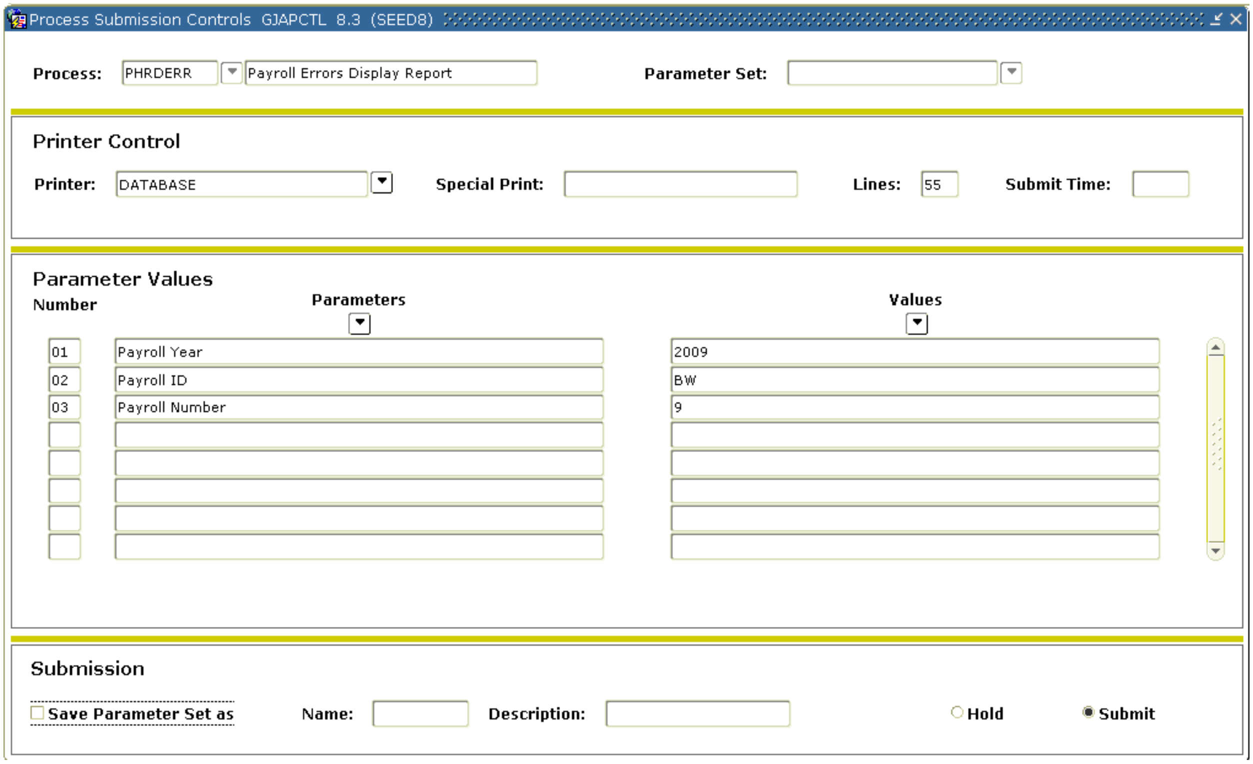
Introduction

Re-extractions are used to tell the system that something pertinent to employee deduction or job records has changed within the payroll currently being processed such as, a change in deduction amount or a change in salary. Specifically, the associated time entry records extracted during the Time Processing Report (PHPTIME) must be erased and replaced with revised time entry records.

Since changes to these records may be required throughout the payroll cycle, you must manually set up records for re-extraction before changes can be made to job and deduction information This manual action causes the dispositions of these records to be reduced to 05, awaiting re-extract. These records can then be forced into the re-extract run of the Time Processing Report (PHPTIME) using the new job and/or deduction information.

If there are time entry records at disposition 05, perform one of the following procedures to view payroll errors for those records. (Report – PHRDERR or Inquiry – PHIDERR)

Banner form



Steps

Follow these steps to complete the process.

1. Access the Payroll Errors Display Report (PHRDERR).
2. Double-click in the **Printer** field and select the name of your printer.
3. Enter the calendar year in YYYY format in the **Values** field for the Parameter **01 Payroll Year**.
4. Select the **Search** function and select *BW* (Bi-Weekly) in the **Values** field for the Parameter **02 Payroll ID**.
5. Enter the number of the pay period to be run in the **Values** field for the Parameter **03 Payroll Number**. Select the **Search** function if you need to view the Payroll Calendar Rule Form (PTRCALN) for values.
6. Click the **Save Parameter Set As** checkbox if you will be using the same printer and date value again.
7. Click the **Submit** radio button to process the calculation.

8. Click the **Save** icon.

9. View displayed errors employee by employee on that payroll, including the errors for each time entry record (missing deductions, invalid Earnings codes, etc).

10. Access the Pay History Display Errors Form (PHIDERR).

11. Correct all errors.

12. Access the Time Processing Report (PHPTIME) after all errors have been corrected.

13. Enter *R* in the **Values** field to denote a Re-extract for the Parameter **04 Extract Indicator**.

14. Click the **Save** icon.

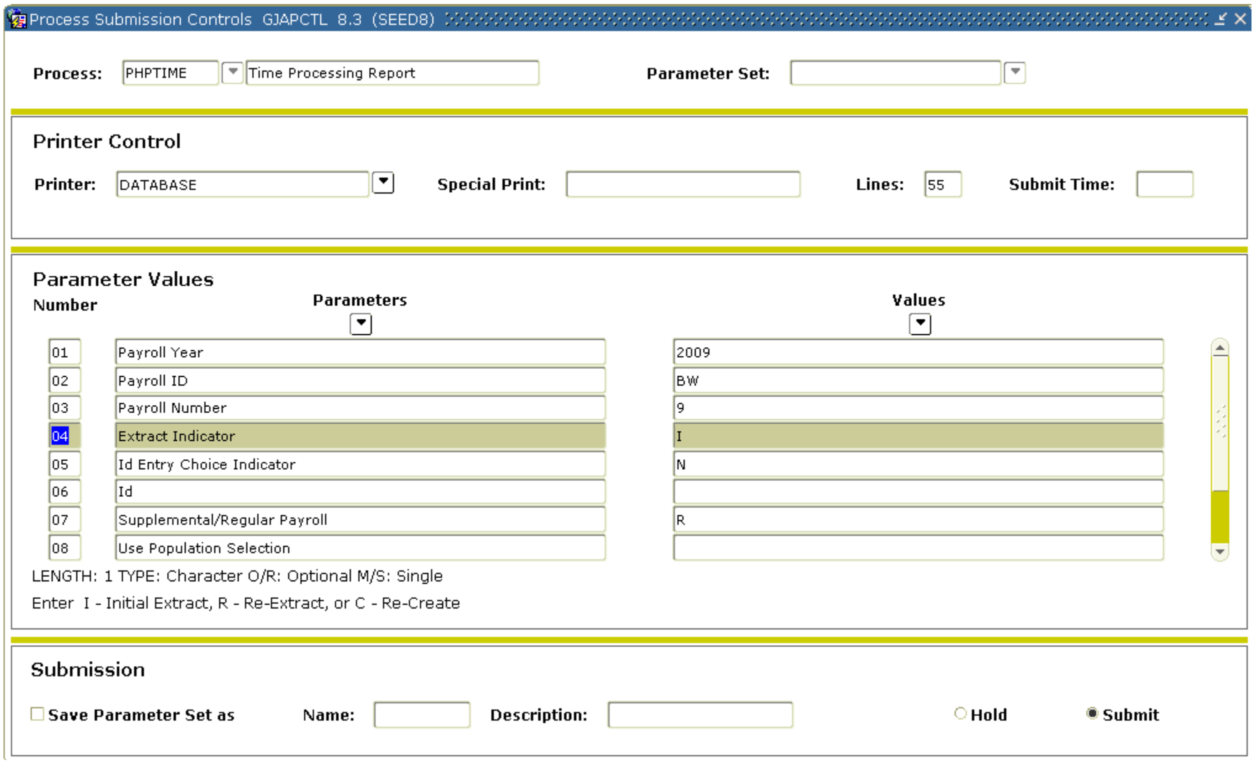
15. Click the **Exit** icon.

Note: After centralized payroll has run the Time Processing Report (PHPTIME) for the first time for the payroll, HR must choose the Re-extract parameter option to recreate all time entry records that are at disposition 05. **DO NOT SELECT THE RECREATE OPTION:** If you choose the Recreate parameter option, the system will totally wipe out all time entry records for that payroll, including those at dispositions other than 05, and create new ones. If you use the Recreate parameter option, any values entered on the Online Time Entry Form (PHAHOUR) will be replaced. **It is the intent to have the Recreate option removed as a parameter, however, until this is accomplished assure that you are selected RE-EXTRACT and not RECREATE.**

The Payroll Extract Process (PHPTIME) can be run with the selection of the Initial Extract option multiple times during the payroll process. This option could be used, for example, to extract records for employees whose jobs have been added to the system during the payroll process.

Resubmit PHRDERR or re-access PHIDERR to ensure that all errors have been corrected. Continue this process until all errors are corrected.

Banner form



Steps

1. Access the Time Processing Report (PHPTIME).

7. Double-click in the **Printer** field and select the name of your printer.

8. Enter the calendar year in YYYY format in the **Values** field for the Parameter **01 Payroll Year**.

9. Select the **Search** function and select *BW* (Bi-Weekly) in the **Values** field for the Parameter **02 Payroll ID**.

10. Enter the number of the pay period to be run in the **Values** field for the Parameter **03 Payroll Number**. Select the **Search** function if you need to view the Payroll Calendar Rule Form (PTRCALN) for values.

11. Enter *R* in the **Values** field to denote Re- extract for the Parameter **04 Extract Indicator**.

12. Enter *N* in the **Values** field to denote No individual ID's entered for the Parameter **05 ID Entry Choice Indicator**.

13. Leave the **Values** field blank for the Parameter **06 ID**.

14. Enter *R* in the **Values** field to denote Regular payroll for the Parameter **07 Supplemental/Regular Payroll**.

15. Enter *N* to denote do not use for the Parameter **08 Use Population Selection**.

16. Use the scroll bar to access parameters 09-11.

17. Leave the **Values** field blank for the Parameter **09 Population Selection ID**.

18. Leave the **Values** field blank for the Parameter **10 Creator ID**.

19. Leave the **Values** field blank for the Parameter **11 Application ID**.

20. Click the **Save Parameter Set As** checkbox if you will be using the same printer and date value again.

21. Click the **Submit** radio button to process the calculation.

22. Click the **Save** icon.

    Note: When submitting PHPTIME for an individual ID, you need to run PHPTIME for the total pay population first. Failure to do this will cause you to run each ID individually to catch each record up to the first/master run for PHPTIME for the Pay ID and Pay Number. By entering the re-extract indicator on Parameter 04, the system will only pick up records at disposition 05 (re-extract).

    The running of PHPTIME should be limited to one individual per VPDI code.

23. Click the **Exit** icon.

Appendix

Section goal

The purpose of this section is to provide reference materials related to the workbook.

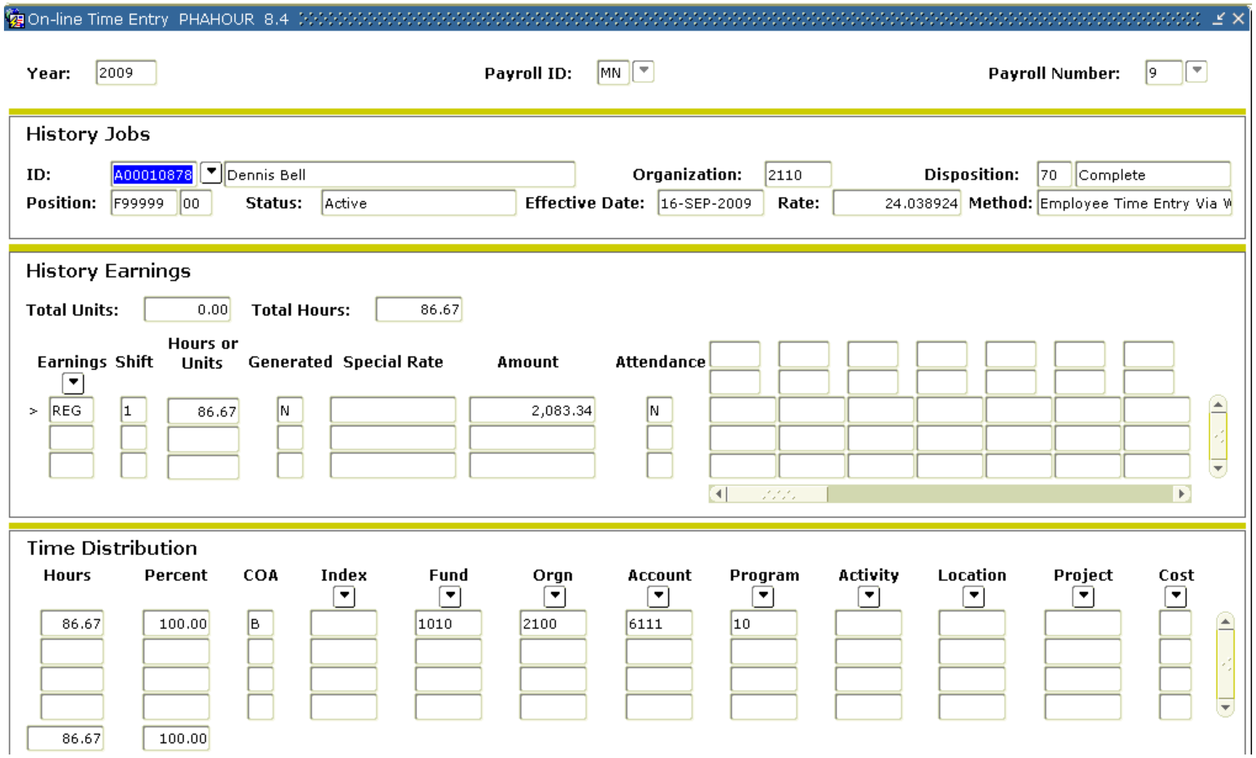
Performing the Time Entry Process Job Aid

Introduction

The Time Entry Form (PHAHOUR) allows the user to enter exception hours or hours worked. For this exercise, enter time information for an employee.

Note: When the message (*Warning* Possible Insufficient Leave Balance) is displayed the employee has insufficient leave balance.

Banner form



On-line Time Entry PHAHOUR 8.4

Year: 2009 Payroll ID: MN Payroll Number: 9

History Jobs

ID: A00010878 Dennis Bell Organization: 2110 Disposition: 70 Complete

Position: F99999 00 Status: Active Effective Date: 16-SEP-2009 Rate: 24.038924 Method: Employee Time Entry Via W

History Earnings

Total Units: 0.00 Total Hours: 86.67

Earnings	Shift	Hours or Units	Generated	Special Rate	Amount	Attendance
REG	1	86.67	N		2,083.34	N

Time Distribution

Hours	Percent	COA	Index	Fund	Orgn	Account	Program	Activity	Location	Project	Cost
86.67	100.00	B		1010	2100	6111	10				
86.67	100.00										

Steps

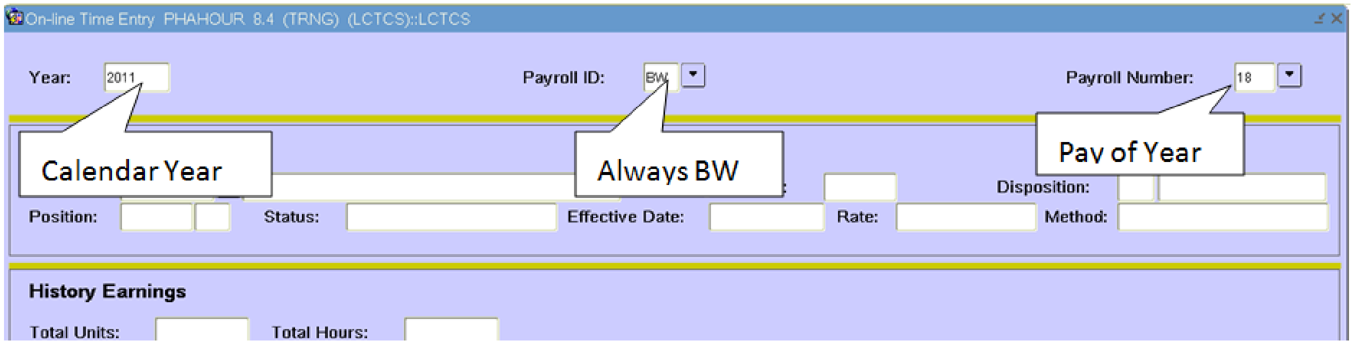
Follow these steps to complete the process.

2. Access the Online Time Entry Form (PHAHOUR).

3. Enter the active fiscal year in the **Year** field.

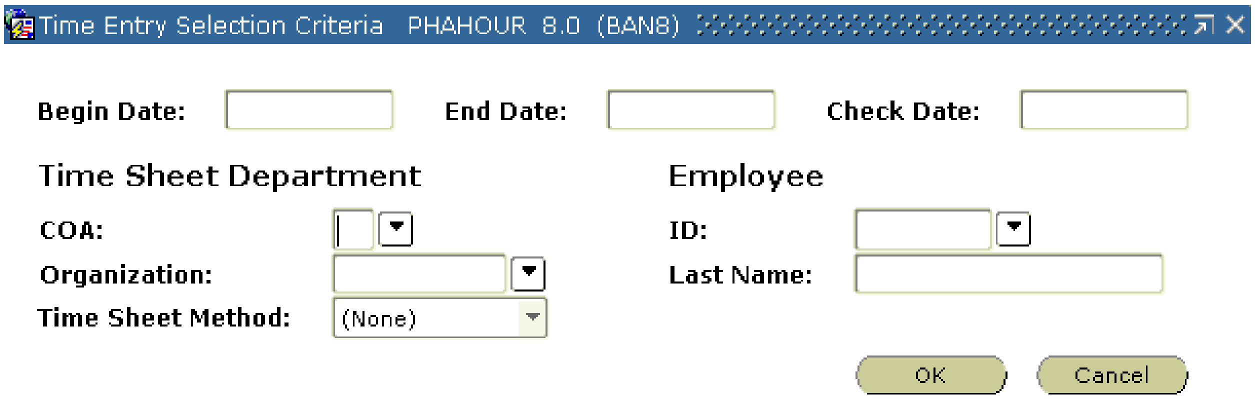
4. Select the **Search** function in the **Payroll ID** field, and select a Payroll ID code form PTRPICT. (For this exercise, select *BW* for Bi-weekly).

5. Select the **Search** function in the **Payroll Number** field and select a Payroll number from PTRCALN.



Options – Enter Selection Criteria (Optional)

When you perform a next block after entering the pay event information, the Time Entry Selection Criteria window will open. Its use is optional. You can click 'Cancel' to move to the complete list of timesheets.



Steps

6. Select **Enter Selection Criteria** from the **Options** menu.

7. In the Time Entry Selection Criteria window, select records by timesheet organization or timesheet methods, if necessary.

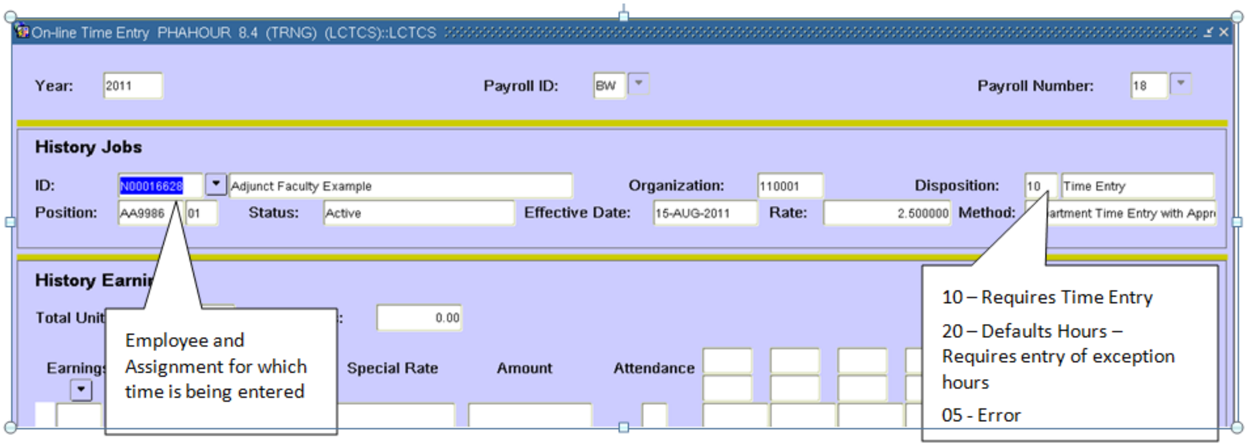
8. Select the **OK** button.

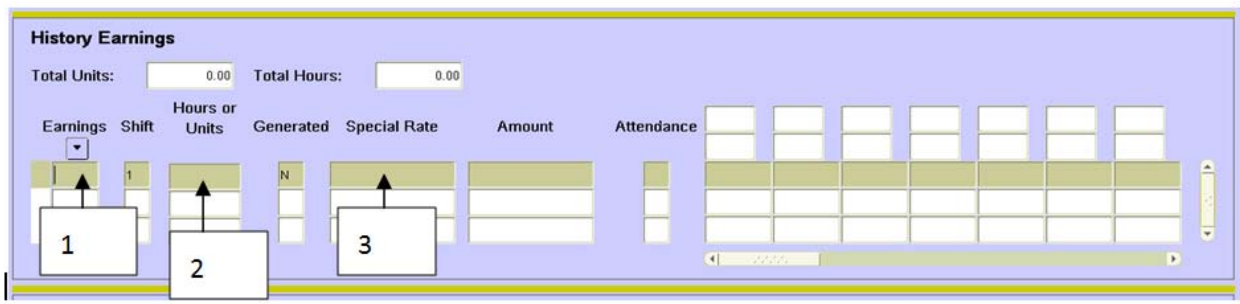
9. Select the **Search** function in the **ID** field and select an employee.

   Note: You can click 'Cancel' to move to the complete list of timesheets.

10. Perform a **Next Block** function.

11. The values in both the History Jobs block and History Earnings block are populated by the system.





Box 1 – Enter Earning Code. You can use the List of Values button to look up earn codes applicable to this assignment.

Box 2 – Enter the hours for this earning code

Box 3 – Enter the rate for the earning code when required. If you do not enter the rate, Banner will not allow you to continue through the time entry process.

12. Select the **Search** function in the **Code** field, and select an earnings code.

Note: If you know the earn code you can enter it directly.

Special Processing Note: When reporting Annual Leave Taken, Sick Leave Taken, Comp Time 1.5 and Comp Time Straight use the following earn codes:

Annual Leave Taken = PT1

Sick Leave Taken = PT2

Comp Time 1.5 Taken = PT3

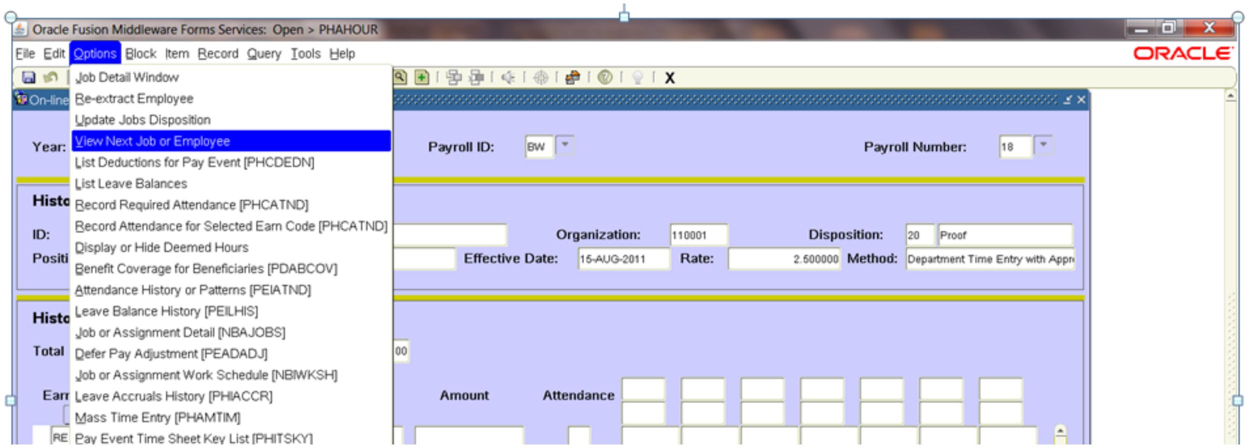
Comp Time Taken Straight = PT4

13. Arrow down to the next line and enter the new earnings code if you require additional Earnings Codes.

14. Tab to the **Hours or Units** field.

15. Enter the number of hours worked in the **Hours or Units** field.

16. To move to the next timesheet, access the Options menu and select View Next Job or Employee.



Repeat this step to move through the list of timesheets.

16. Click the **Exit** icon when you have finished to leave the form.

Correcting Time Entry Errors

If you have entered an incorrect line on the timesheet, follow these steps to correct it:

Wrong Earn Code	Incorrect number of hours
1. Highlight the incorrect earn code (you cannot type over it) 2. Select the Record menu and then select Record Remove. Banner will delete the entire row (the earn code and hours entered) 3. Click in the Earning Code field of the first empty line. Enter the correct earn code, move to the Hours or Units field and enter the appropriate number of hours.	1. Clear the Hours or Units field of the incorrect value. 2. Enter the correct number of hours

Determining and Employee's Assignment

Unfortunately the timesheet on PHAHOUR does not include the title of the assignment for which you are entering time. PHAHOUR only displays the position number/suffix for the assignment. If you need to determine an assignment title, follow these steps:

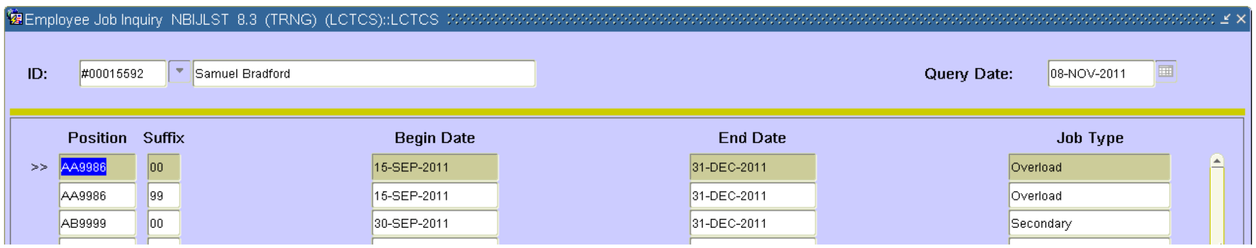
1. Hit the F5 key. A Go To… window will appear at the top of the screen:

On-line Time Entry PHAHOUR 8.4 (TRNG) (LCTCS)::LCTCS

Go To... My Institution: http://wwww.sungardhe.com

Year: 2011 Payroll ID: BW

2. Enter NBIJLST into the Go To... field. Make note of the employee's id and the position number/suffix which appears on PHAHOUR
3. Hit enter. The Banner form NBIJLST Employee Job Inquiry form will appear.
4. Enter the employee's ID in the ID field.
5. Perform a Next Block to populate the form. NBIJLST will display all assignments active for the employee as of today.

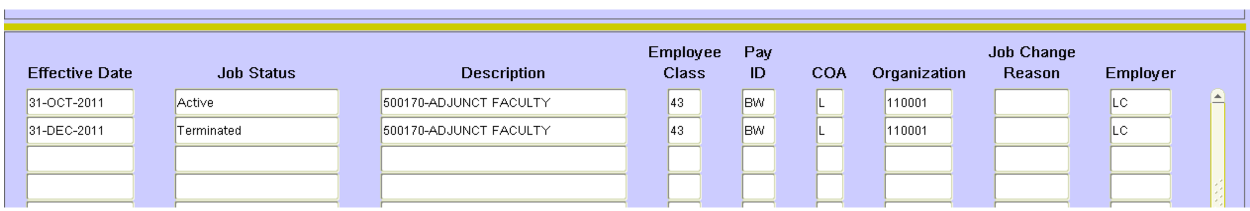


Employee Job Inquiry NBIJLST 8.3 (TRNG) (LCTCS)::LCTCS

ID: #00015592 Samuel Bradford Query Date: 08-NOV-2011

Position	Suffix	Begin Date	End Date	Job Type
AA9986	00	15-SEP-2011	31-DEC-2011	Overload
AA9986	99	15-SEP-2011	31-DEC-2011	Overload
AB9999	00	30-SEP-2011	31-DEC-2011	Secondary

6. Click on the appropriate position/suffix combination. As you highlight a record, information about that assignment appears in the lower block. This information includes the assignment title under Description.

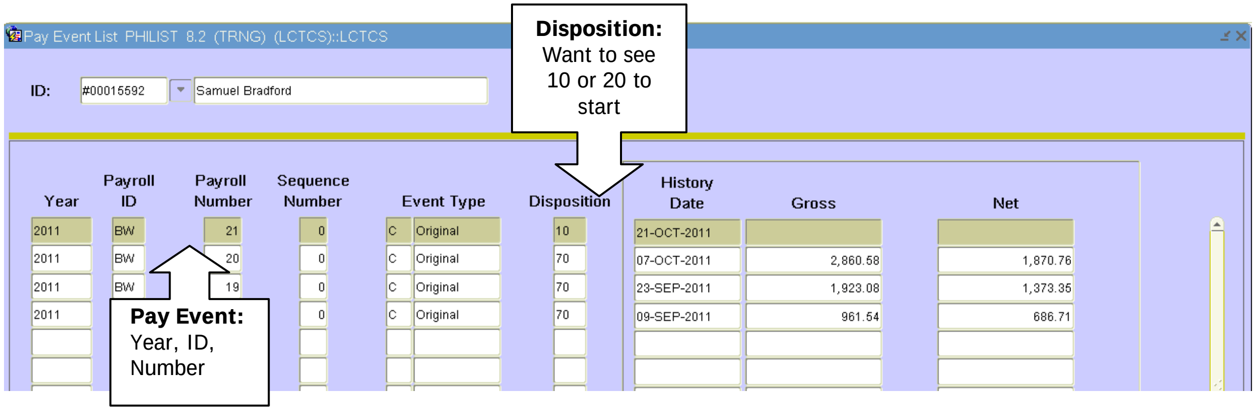


Effective Date	Job Status	Description	Employee Class	Pay ID	COA	Organization	Job Change Reason	Employer
31-OCT-2011	Active	500170-ADJUNCT FACULTY	43	BW	L	110001		LC
31-DEC-2011	Terminated	500170-ADJUNCT FACULTY	43	BW	L	110001		LC

7. Exit NBIJLST to return to PHAHOUR. Hit F5 to close the Go To... window and proceed with your time entry.

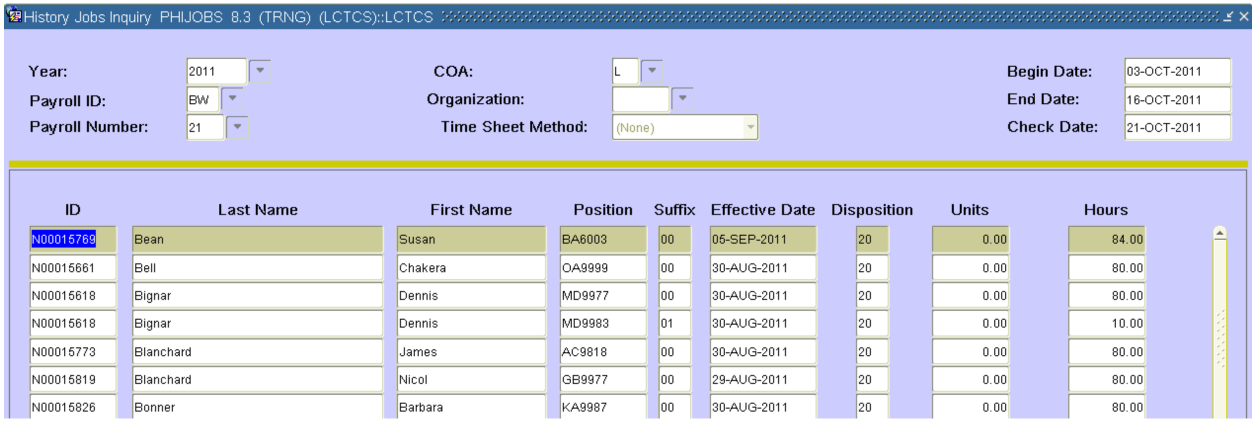
Other helpful forms

PHILIST – Pay Event List



The Pay Event List Form provides a record of all payroll transactions and adjustments for a specified employee. Transactions are displayed in descending order by year, then alphabetically by Pay ID, and then in descending order by Pay Sequence within that year and Pay ID. This is a display-only form. You can use this to see the current disposition of the pay event being processed.

PHIJOBS – History Jobs Inquiry


History Jobs Inquiry PHIJOBS 8.3 (TRNG) (LCTCS)::LCTCS

Year: 2011
Payroll ID: BW
Payroll Number: 21
COA: L
Organization:
Time Sheet Method: (None)
Begin Date: 03-OCT-2011
End Date: 16-OCT-2011
Check Date: 21-OCT-2011

ID	Last Name	First Name	Position	Suffix	Effective Date	Disposition	Units	Hours
N00015769	Bean	Susan	BA6003	00	05-SEP-2011	20	0.00	84.00
N00015661	Bell	Chakera	OA9999	00	30-AUG-2011	20	0.00	80.00
N00015618	Bignar	Dennis	MD9977	00	30-AUG-2011	20	0.00	80.00
N00015618	Bignar	Dennis	MD9983	01	30-AUG-2011	20	0.00	10.00
N00015773	Blanchard	James	AC9818	00	30-AUG-2011	20	0.00	80.00
N00015819	Blanchard	Nicol	GB9977	00	29-AUG-2011	20	0.00	80.00
N00015826	Bonner	Barbara	KA9987	00	30-AUG-2011	20	0.00	80.00

The History Jobs Inquiry Form displays the history jobs records of employees by pay event, time sheet organization, and time sheet/roster indicator. Records are displayed only for computer-generated pay events. The total hours and units for specific records are also displayed. This is a display-only form. You can use this form to scan the status of all the timesheets you have for processing.

Important additional time entry process information

√	Positive Pay: If you are entering absence hours, enter the regular hours first, then **Save**.
√	If the **Reduce Regular Hours** checkbox has been selected for the Earnings code on the Employee Class Rule Form (PTRECLS), the number of exception hours entered will automatically reduce the defaulted regular hours.
√	If you have entered a blank line, a record line is reserved. You will not be able to leave that line until you have entered a value or have done a Record Remove function.

√	Employees with default hours on the Employee Jobs Form (NBAJOBS) will be at disposition 20, awaiting proof. Employees not set-up with default hours will be at disposition 10, awaiting time entry. Click on the code to display eligible Earnings codes for the employee as established on the Employee Class Rule Form (PTRECLS).
√	The Time Entry Form (PHAHOUR) provides for a re-extract function that, if performed, drops the disposition back to 05 and allows maintenance to employee's benefit/deduction and job assignment records. Time sheet records may also be removed if the employee is not to be paid.

Centralized Payroll

During the payroll process centralized payroll will run additional error message after the time entry period has closed. Email notifications will be sent to the institution for HR to correct identified errors before confirming payroll. HR will be required to email centralized payroll when those errors have been corrected.

Forms Job Aid

Form	Full Name	Use this Form to...
GOAEACC	Enterprise Access Controls	used to associate an Oracle username with a PIDM. This is the only form that establishes a relationship between the Oracle username and the SPRIDEN record.
NBAJOBS	Employee Jobs Form	used to maintain information about an employee's assignments within the institution. This information defines when and how an employee is to be paid and the amounts and labor distributions account numbers to use when encumbering and expending with the Banner Finance system.
NBAJQUE	Override Routing Queue Form	allows user to override routing queues established on the Routing Queue Rule Form (NTRRQUE) or on the Position Description Form (NBAPOSN).
NBAPOSN	Position Definition Form	used to ensure that a routing queue reference has been defined.
NTRINST	Position Control Installation Rule Form	used to indicate whether an approver must return a time transaction to the employee who entered the time transaction on the Web.
NTRPROX	Electronic Approval Proxy Rule Form	enables the time entry user to establish proxies in order to approve time transactions in his/her absence. The proxies established on the Time Entry Proxy Information window are used exclusively with time transactions. Other proxies, used specifically for the Electronic Approvals module, can be established on the main window of NTRPROX.
NTRRQUE	Routing Queue Rule Form	allows the user to develop a routing queue for an approval category based on the position or time sheet organization of the employee. Routing queues should be created based on an organization's business hierarchy.

Form	Full Name	Use this Form to...
NTVACAT	Approvals Category Code Validation Form	used to create the various categories of approvals that are specific to your institution. In order to use Web Time Entry, a category code must be associated with Position Control Installation Rule form NTRINST.
PHADSUM	Department Approval Summary Form	used to displays time that was entered through the Web. The form enables you to query on the transaction status. The records are sorted alphabetically within the queue status.
PTRCALN	Payroll Calendar Rule Form	used to control time entry on the Web for pay period reporting. This form determines when an employee can enter, submit and/or view time records via the Web.
PTRECLS	Employee Class Rule Form	used to specify time entry rules for the employee class being defined, the Time Entry Rules window and Eligible Earnings Codes window.
PTRINST	Installation Rule Form	used to contain one field that controls time entry on the Web, the **Certification Required on the Web** field. This field indicates whether a Certification page is to be displayed after time report submission.
PTRPICT	Payroll Identification Rule Form	used to enter time on a time sheet or request leave for a particular pay period any day during the time frame established for time entry for that period via the rules on PTRPICT and PTRCALN.
PTRSHFT	Shift Premium Rule Form	used to specify the hours associated with the shift code whose premium information is being defined.
PTRUSER	User Codes Rule Form	used to identify security privileges in Banner.