Leave Entry Guide
Introduction

Departmental leave time entry is a time keeping method in Banner HR which places the responsibility of entering and approving leave for salaried employees with their managing departments. This guide discusses the leave time entry process in Banner HR.

Leave Overview

Departments are responsible for entering all leave taken by their biweekly salaried employees (employees with payroll ID of B1) in Banner. The following gives a high level overview of how leave time is tracked using departmental leave time entry.

1) Employees submit their leave forms and these are tracked by their department in an electronic format or using paper timesheets/timecards.

2) Managers/supervisors review and, if accurate, sign employee leave sheets and submit to the department originator for entry into Banner.

3) In Banner HR, the department originator extracts the leave time sheets for employees and keys their leave (PHATIME form). This can be started on Friday of a pay week (last day of pay period). Time should be entered for the corresponding pay period ending in this week.

4) Designated departmental approvers review and approve leave in Banner HR (PHADSUM form).

5) Once approved, leave balances are instantly updated in Banner and can be viewed by employees using Banner Self Service.

Some important things to note:

- Leave time entry happens on a biweekly basis. The leave time entry/approval period is from the last day in a pay period to the following Thursday. Leave is always entered for the most recently past pay period. For example, if employees are paid on June 13, this is for the period from June 1 to June 14. Leave for this period should be both entered and approved in the period from June 14 to June 20.

- Approvers are responsible for approving all submitted leave. Once they have approved leave in Banner, employee leave balances will be immediately updated.

- It is important for departments to submit and approve leave within the designated time entry period. If leave is not entered in a timely manner, employees will not be able to rely on their posted balances on Banner Self Service. Further, if time is submitted late, it is possible that the actual dates for leave will not be accurately displayed in the HR system. In such cases, departments will be responsible for communicating actual leave history to their employees.
Key Banner Forms

When working with departmental leave in Banner there are some key forms to keep in mind. These include:

- **Electronic Approvals of Time Entry form (PHATIME)** - primary form used for leave entry by originators (users that key leave). Can also be used by approvers for approving leave.
- **Web/Department Employee Time Inquiry form (PHIETIM)** – similar to PHATIME form but it is used for inquiry purposes only (no leave records can be updated on this form).
- **Department Payroll Summary form (PHADSUM)** – primary form used by approvers for mass approving leave submissions. Approvers can also return leave to originators for correction from this form.
- **Employee Leave Balances form (PEALEAV)** – lists employee leave details for all leave types.
- **Employee Attendance Inquiry form (PEIATND)** – lists employee leave details broken down by leave type and day. This form is restricted to approvers. Form can also be filtered to show a specific type of employee leave for a specific period of time.
- **Electronic Approval Proxy Rules form (NTRPROX)** - this form is where both originators and approvers can designate proxies for their leave tasks. Proxies are users that have been granted permissions to act on behalf of originators or approvers (who designated them) when they are unavailable to key/approve leave.
The first step to recording leave in Banner is to extract a timesheet for each employee that has reported leave. By extracting a timesheet, you are initiating the leave entry process for the employee(s) that you have selected in the extraction process.

Once a timesheet is extracted, the Transaction Status field on PHATIME changes to “In Progress”. This allows timesheets to be available for further processing.

There are two ways to extract timesheets in Banner:

- You can extract all timesheets in an organization at once. This is the easiest way to extract time for a group as you are only required to do this one time in a leave period for each organization that you are entering time. See “Extracting All Timesheets in an Organization” for details on how to do this.

- You can extract one timesheet at a time for each individual that has submitted leave in the current period. This method takes longer as you have to process each leave record individually. See “Extracting Individual Timesheets for Leave Entry” for details on how to do this.

**NOTE:** You can only extract leave sheets for employees that fall into organizations that you have permission to view. Once timesheets have been extracted for a leave period, only the department originator or the department originator’s proxy can access the timesheets to update time information. In certain cases, a super-user may also be able to update the timesheets (super-users are currently limited to HR staff).

**Extracting All Timesheets in an Organization for Leave Entry**

The fastest way to initiate leave time entry for employees is to extract all timesheets in an organization at once.

1. **To extract all timesheets in an organization:**
   
   1. In the Go To... box, type PHATIME and press ENTER.

   ![Phatime screenshot](image)

   This opens the Electronic Approvals of Time Entry form.
2. In the Entry By field, select **Leave Report**.

3. Verify that the value of the Time Entry Method field is **Department**.

4. Verify that the value of the unit’s timesheet COA number in the COA field is **M**.

5. In the Organization field, type the department code for the organization in which you plan to enter time.
   Once you click in another field, the organization name will appear in the adjacent text box.
   
   **Organization:** 66002  Department of Human Resources

6. Verify that the value of the Transaction Status field is **Not Started**.

7. Verify that the correct year is in the Year field. The current year is displayed by default. If this is incorrect, you can overtype it.

8. In the Leave ID field, enter the **B1**.

9. In the Leave Number field, type the leave period. The leave period corresponds to the current payroll number.
NOTE: The leave period must be open in order to extract timesheets.

10. Click the **Next Block** button.
A Forms dialog box displays the message: Do you want to extract time to begin time entry?

11. Click the Yes button.
   Data displays in the ID, Last Name, First Name, Position, Suffix, Status and Method fields. A dialog box displays the message: XX time records processed with no errors. 

   ![Dialog box showing extracted timesheets]

   **NOTE:** This extracts the timesheets, moving the transaction status to “In Progress”, and ensuring that all timesheets for the leave period are available for further processing.

12. Click the Continue button.
   The timesheets are extracted, and they are ready for completion. Click Page Up/Down to change the employee that you are viewing/updating.
Extracting Individual Employee Timesheets for Leave Entry

This procedure describes how you can extract timesheets one employee at a time.

NOTE: Do not perform this procedure if you have already extracted timesheets using the previous procedure “Extracting All Timesheets in an Organization”.

► To extract a timesheet for an individual employee:

1. In the Go To... box, type PHATIME and press ENTER.

This opens the Electronic Approvals of Time Entry form.
2. In the Entry By field, select **Leave Report**.

3. Verify that the value of the Time Entry Method field is **Department**.

4. Verify that the value of the unit’s timesheet COA number in the COA field is **M**.

5. In the Organization field, type the department code for the organization in which you plan to enter time. Once you click in another field, the organization name will appear in the adjacent text box.

6. Verify that the value of the Transaction Status field is **Not Started**.

7. Verify that the correct year is in the Year field. The current year is displayed by default. If this is incorrect, you can overtype it.

8. In the Leave ID field, enter the **B1**.

9. In the Leave Number field, type the leave period. The leave period corresponds to the current payroll number. You can click the Search button if you are not sure of the correct Leave Number. **NOTE**: The leave period must be open in order to extract timesheets.

10. Click the **Tab** key. The Time Entry Selection Criteria dialog will appear. This form allows you to enter an employee ID or name in order to extract a specific employee.

11. Enter the employee’s ID. If you do not know the employee ID, click the Search button to open the inquiry form and search for the employee. **Note**: If you choose not to enter an ID on this dialog and you click OK, you will initiate timesheets for all employees in the organization. If you do so, all of these employees will have a Transaction Status of In Progress but you only need to complete and submit timesheets for users that have submitted leave.

12. Click **OK**. You will be asked to confirm if you wish to extract time to begin time entry for the employee.
13. Click the **Yes** button.
   Data displays in the ID, Last Name, First Name, Position, Suffix, Status and Method fields. A dialog box displays the message: XX time records processed with no errors.

   ![Message Box]

   **NOTE**: This extracts the timesheet, moving the transaction status to In Progress. The timesheet is now available for further processing.

14. Click the **Continue** button.
   You can now proceed to enter time for the employee.

   **NOTE**: If you are acting as a proxy for one of your coworkers, enter the logion ID for the person you are acting on behalf of in the Proxy For box on PHATIME and then follow the same steps as if you were doing the action yourself.
Entering and Submitting Leave Time

Once timesheets are extracted, you can begin entering time for employees. Leave time entry involves entering earnings codes for the type of leave to be entered, changing or modifying the timesheet data and submitting timesheets for approval.

**NOTE:** If you just extracted leave, you can start at step 11 below. Steps 1 through 10 describe how you can find a record that you extracted in a previous session.

To enter leave for employees:

1. In the Go To… box, type `PHATIME` and press **ENTER**.
2. In the Entry By field, select **Leave Report**.
3. Verify that the value of the unit’s timesheet COA is **M**.
4. In the Organization field, type the unit’s timesheet Organization code in the Organization field for which you wish to make time entries.
5. Verify that the value of the Transaction Status field is **In Progress**.
6. In the Year field, type the year for the time entry.
7. In the Leave ID field, type **B1**.
8. In the Leave Number field type the pay period number.
   **NOTE:** The leave period must be open in order to extract timesheets.
9. Click the **Next Block** button.

The first “In Progress” timesheet displays.

You can now proceed to edit the timesheet (continue to step 9) or search for another employee’s timesheet.

10. Click the **Next Block** button.
11. If the correct employee is not listed, use your up/down arrow keys to choose the correct employee. You can also click the Search button associated with the ID field to search for an employee.

   **NOTE:** Only “In Progress” employees that you have already extracted for the specified organization will be available for selection.
12. Type the appropriate earnings code in the Earn field, or click the Search button to display a list of values.

13. Type the number of leave hours taken, on the same line as its corresponding leave code, for each day under the appropriate date. You will notice that the total leave is automatically calculated and displayed in the Totals by Earn field.

14. If the employee reported more than one leave type for the leave period, repeat steps 12 and 13 for each leave code and hours taken.

The following is an example of a completed leave form.

**NOTE:** As you are entering leave, you may notice in the bottom left of the page that the system will warn you of possible insufficient balances for the leave requested. To verify if an employee has the leave time available, from the Options menu select List Leave Balances.

15. Click the Save button. The changes you have made are saved. The AutoHint/AutoHelp line indicates the transaction is complete and the number of records that were applied and saved.

16. Verify that all of the employee’s leave information has been entered.

17. From the Options menu, select Submit Time for Approvals. The AutoHint/AutoHelp line displays the message: Time transaction successfully submitted.
NOTE: You do not have to enter/submit all leave for an employee in one session. You can start entering leave for an employee, click Save, and then come back at a later time to complete/submit for approval. Just remember that you need to look for employees with a Transaction Status of “In Progress” if you want to look at records that you previously started but did not submit.

18. If you have more employees to enter leave for, you can:
   a. Left click in the ID field of the Employee ID block and use the Arrow up/down keys to find the next employee to enter. Then repeats the above steps starting at step 11.
   OR
   b. Click the Rollback button if you need to enter leave for members of a different organization and repeat the extraction steps above.

Restarting a Timesheet

If you start entering leave for an employee and realize that it was in error, restarting the timesheet may be more efficient than correcting the sheet.

NOTE: If you have initiated a leave sheet for an employee that did not have leave in a period, you should delete the timesheet instead of restarting it. Restarting a timesheet is a way to clear the current values but leave it available for completion.

► To restart a timesheet:

1. In the Go To… box type PHATIME and press ENTER. This opens the Electronic Approvals of Time Entry form.
2. Verify that the In the Entry By field is set to Leave Report.
3. Verify that the value of the unit’s timesheet COA is M.
4. In the Organization field, type the unit’s timesheet Organization code in the Organization field for which you wish to make time entries.
5. Verify that the value of the Transaction Status field is In Progress.
6. In the Leave ID field, type B1.
7. In the Leave Number field type the pay period number.
8. Click the Next Block button. In Progress timesheets display.
9. In the ID field, type the employee’s ID. The employee’s timesheet is available to correct.
   NOTE: Timesheets that have a status of In Progress or Return for Correction need to have time entered or corrections made.
10. From the Options menu, select Restart Time for Employee.

   A dialog box prompts you to confirm your action.

   By clicking Yes you are confirming in the restart. Any time that was entered for this employee prior to restarting the timesheet will be deleted and will need to be re-entered.

11. Click the Yes button. A dialog box displays the message: Re-extracting Time Entry.
12. Click OK to confirm the restart option. 
   Process is complete displays on the status line.
13. Type the time information to restart. 
   Once the employee’s timesheet restarts, the message Process is complete displays in the 
   AutoHint/AutoHelp line at the bottom of the screen. Any time that was entered prior to the restart 
   is deleted and must be reentered.
14. Click the Save button. 
   The changes you have made are saved. The AutoHint/AutoHelp line indicates the transaction is 
   complete and the number of records that were applied and saved. If no changes were made, 
   clicking the Save button is not necessary.

**NOTE:** To delete an extracted record and remove it entirely from the payroll process, click in the ID 
field of the Employee ID block, and select Remove Record from menu bar at the top of the form.

**Reviewing Leave Entry Records**

The Web/Department Employee Time Inquiry form (PEIETIM) is a read-only form that you can access 
in order to look at current or previous leave entries that have been made for organizations that you 
are assigned to. Using this form, you can review past leave entry details. No changes can be made 
on this form.

► **To review timesheets on PHIETIM:**

1. In the Go To… box type PHIETIM and press ENTER. 
   This opens the Web/Department Employee Time Inquiry form.
2. Verify that the In the Entry By field is set to Leave Report. 
3. Verify that the value of the Time Entry Method field is Department. 
4. Verify that the value of the unit’s timesheet COA is M. 
5. Verify that the value of the unit’s timesheet COA number in the COA field is M. 
6. In the Organization field, type the department code for the organization in which you plan to view 
   leave entries. 
   Once you click in another field, the organization name will appear in the adjacent text box.
   
   **Organization: 65002 Department of Human Resources**

7. From the Transaction Status field select the type of leave entries that you wish to view. For 
   example, if you want to view the status of all extracted timesheets for a leave period, select is All 
   (Except Not Started).
8. In the Year field, enter the year that you wish to view leave records in . The current year is 
   displayed by default. If this is incorrect, you can overtype it.
9. In the Leave ID field, enter the B1.
10. In the Leave Number field, type the leave period that you wish to review.
11. Click the Next Block button. 
   This displays a summary of all leave records meeting the criteria you entered.
NOTE: If the users entering time have chosen to extract all employees in an organization for a specific leave period, it is quite possible that many employees will be listed with an In Progress status and no hours. This may just mean that the person keying the time did not have any time to key for these employees.
Reviewing and Approving Timesheets – Department Approver

At the end of a leave period, department approvers must review all leave reports for which they are responsible and approve or correct them. At this point, the department originator has submitted timesheets for approval and the transaction status of the timesheets has changed from In Progress to Pending. The department approver follows these steps in the approval process:

1. Checks the transaction statuses for all of their time sheets for the current pay period to ensure each timesheet is in a status that will allow it to be approved. Statuses are:
   - **Not Started** – time sheets that have not been extracted for leave entry on the Electronic Approvals of Time Entry (PHATIME) form. If the department originator needs to extract timesheets, Not Started must be the value in the Transaction Status field.
   - **In Progress** – time sheets that have been extracted and are ready to be edited or are in the process of being edited.
   - **Pending** – time sheets that have been submitted to the department approver. Leave entry has been completed. A department originator cannot make changes unless time sheets are returned for correction.
   - **Approved** – leave transactions have been approved by all department approvers in the routing queue. Time sheets cannot be changed once they are approved.
   - **Completed** – for leave, the leave balances are updated in the system as soon as the transactions are approved.
   - **Error** – timesheets that have problems and may need to be corrected. Time transactions can go into error status when submitted for approval and during the approval process. All errors that are generated can be viewed using the View Errors option of this form. The Pay History Display Errors (PHIDERR) form is used to view errors.
   - **Return for Correction** – leave transactions that have been returned to the department originator by a department approver during the approval process. These transactions need to be corrected by the department originator and resubmitted to the department approver.
   - **All (Except Not Started)** – all timesheets that are in Approved, Completed, Error, In Progress, Pending, or Return for Correction status.

2. Access the leave reports in the Pending and Error statuses.
3. Review leave reports individually to identify editing needs.
4. Revise leave information as necessary.
5. Approve leave reports.

The department approver (or their proxy) cannot start the approval process until the leave entry period is open and originators have submitted leave time.

**NOTE:** If changes are required to an employee’s leave after it has been approved or after the leave entry period has closed, the department will have to request Human Resources to make these changes.
If a department approver has transactions awaiting approval, when they log on to Banner and select a form to open, a non-un message will appear.

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
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| Click YES. | A second pop-up message appears: “Do you wish to be notified of new transactions during the current session?”  
  - Click the YES button and the Department Payroll Summary (PHADSUM) form displays all Pending timesheets awaiting approval.  
  - Click the NO button and the Department Payroll Summary (PHADSUM) form displays, but no new timesheets are added during your session display. |
| Click NO. | The Banner Main Menu displays. If you wish to review timesheets, you must navigate to the Department Payroll Summary (PHADSUM) form. |

If a timesheet goes into an Error status while being approved, the department approver must access the Pay History Display Errors form (PHIDERR) to determine what caused the error. Once the errors are corrected, the department approver approves the timesheet.

The department approver can use two forms to review, edit and approve timesheets.

- Use the Department Payroll Summary (PHADSUM) form to approve timesheets individually or to approve all timesheets at once.
- Use the Electronic Approvals of Time Entry (PHATIME) form to approve timesheets individually.
Approving Leave Timesheets

Multiple timesheets can be approved on the same screen at once using the Department Payroll Summary form (PHADSUM). After editing or correcting timesheets, the department approver has two options to approve the timesheet.

- **Approve a specific set of timesheets:** Select the Approve/Acknowledge checkbox for each employee to approve and then click **Save**. Then go to the Options menu and click Apply All Actions.

- **Approve all timesheets at the same time:** Select Approve/Acknowledge All from the Options menu and then select Apply All Actions.
To approve leave requests:

1. In the Go To… box, type PHADSUM and press ENTER.

2. If this is the first form you have opened in your Banner session and you have leave approvals pending, you will be prompted to view these. Click Yes.

3. If prompted with this message, click Yes if you would like to be notified on any other leave requests that are submitted by your department while you are logged onto Banner.
The Department Payroll Summary Form will appear.

4. In the Approval of field, select Leave Report.

5. Verify that the value of the Time Entry Method field is Department.

6. In the Organization field, type the unit’s timesheet Organization code in the Organization field for which you wish to approve time entries.
   If you are unsure, click the Search button and select List of Organizations in my Queue. This will show all organizations that have submissions awaiting your approval.

7. In the Transaction Status field, verify that Pending Timesheets is selected.

8. Press the TAB key to advance to the Year field, and type the year if the appropriate year does not automatically populate the field.


10. In the Leave Number field, type the pay period number. For assistance in entering in the correct pay period number, click the Search button, and select the appropriate number from the list.

11. Click the Next Block button.
   The cursor appears in the ID field in the next block, on the first record.

12. Press your Page Up/Page Down keys to review each employee listed.
13. Select the **Approve/Acknowledge** checkbox associated with all records that you wish to approve.

If you wish to return a record to the originator for correction, select the **Return for Correction** checkbox associated with the record.

14. Click **Options** and then **Apply All Actions**.

**NOTE**: If you wish to quickly approve all records listed, go to **Options** and click **Approve/Acknowledge All**. This selects all records. Then go to **Options** and select **Apply All Actions**. This will approve all the selected employees.

**NOTE**: If you wish to update a specific record, ensure that your cursor is on the employee ID that you wish to update, select **Options**, and then click **View/Change Time Detail (PHATIME)**. This will open the PHATIME form with the employee selected. You can make any required changes, save the form, and then close to return to PHADSUM.
Reviewing Leave Balances

If an employee requests their leave balance, you can direct the employee to the Employee Self Service site, or you, as the department originator, can review the employee's leave balances on the Leave Balances block of PHATIME. Further, if you want to look at leave balance without going through PHATIME, you can access the Employee Leave Balances form (PEALEAV) directly.

► To review leave balances:

1. In the Go To... box, type PEALEAV and press ENTER.

   ![Image of PEALEAV form]

   This Opens the Employee Leave Balance form.

2. Type the employee ID in the ID box.
3. **Click the Next Block** button.
   The employee’s leave balances are displayed.

![Image of leave balances](image)

4. Review employee’s leave balances.
5. **Click the Exit** button to return to the Banner main menu.
Reviewing Employee Attendance Records

The Employee Attendance Inquiry form (PEIATND) is a managerial form that enables managers/supervisors to view all leave submitted for an employee for a designated time period.

► To review employee attendance records:
1. In the Go To… box, type PEIATND and press ENTER.
2. Enter the ID for the employee that you wish to view.
3. (Optional) Enter Begin Date, End Date, and/or Earn Code to further filter the leave period and type to report.
4. Click the Next Block button.

Notice that the form displays all leave for an employee. Also notice that you can see the total number of leave hours taken for each day of the week.

5. Click the Rollback button to add further filtering. This can include:
   a. Changing the ID to another employee’s.
   b. Entering a begin and end date to filter a specific leave period for an employee (e.g. maybe you want to only show leave for the current year).
   c. Entering a specific leave type to filter by in the Earn Code (e.g. SKN for Sick with Note).
Manager Proxies - Department Originator/Approver

The Electronic Approval Proxy Rules Form (NTRPROX) is used to establish Proxies for department originators. A proxy is a person that you wish to designate to act on your behalf with regards to time entry. Prior to establishing proxies, the proxies’ security access must be confirmed (HR must set this up). Once security access is established, the process for creating proxies is simple.

Adding a Proxy

► To add a proxy:

1. In the Go To… field, type NTRPROX and press ENTER.

   This opens the Electronic Approval Proxy Rules form.

   NOTE: The ID of the employee accessing the form will be displayed in the User ID field. This field cannot be changed. Therefore, department originators must establish their own proxies.

2. Click the Next Block button.

3. The cursor moves to the Level Code field.
4. Click the **Other Modules** tab to see any current proxies and to set up a new proxy.

5. Enter the ID(s) of each appropriate proxy in the Proxy ID field and press TAB after each. Their name(s) default in the Name field.

6. Click the **Next Block** button. The cursor moves to the Proxy Modules block.

7. In the Modules field, enter *TIME*.

8. Click the **Save** button to add the proxies when the proxy list is complete.

   The AutoHint/AutoHelp line indicates the transaction is complete and the number of records that
were applied and saved.

9. Click the **Exit** button to return to the Banner main menu.
Removing a Proxy

► To remove a proxy:

1. In the Go To... field, type NTRPROX and press ENTER.

This opens the Electronic Approval Proxy Rules form.

NOTE: The ID of the employee accessing the form will be displayed in the User ID field. This field cannot be changed.

2. Click the Next Block button. The cursor moves to the Level Code field.
3. Click the Other Modules tab to see the current proxies.
4. Click on the Proxy ID for the user that you wish to remove.
5. Click on the Time module entry to place your cursor in this box.

6. Click the Remove Record button. This removes the proxy module.

7. Click the Save button.

8. Click the proxy ID that you wish to remove.

9. Click the Remove Record button. This removes the proxy ID.
10. Click the Save button.

11. Click the Exit button to return to the Banner main menu.

**Acting as Proxy for another employee**

You can act on behalf of a fellow employee when entering (PHATIME) or approving (PHADSUM) time if they have designated you as their proxy. If you are designated as a proxy and you need to act on behalf of one of your coworkers, you only need to enter the Banner login ID for the person you are acting on behalf of in the “Proxy For” box and then follow the same steps as if you were doing the action yourself.
## Glossary

<table>
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<tr>
<th>Term</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>Approver</td>
<td>An individual who has the ability to update, change, return or approve the time submitted by the originator. An approver’s action is required for the time entered via the Electronic Approvals of Time Entry Form (PHATIME).</td>
</tr>
<tr>
<td>Earnings Code</td>
<td>The code used on the Earn Code Rule Form (PTREARN) to identify a kind of pay or leave, for example regular earnings, sick pay or vacation pay.</td>
</tr>
<tr>
<td>Leave Report</td>
<td>A method to collect actual leave time taken that is sent through approvals and posted to leave balances.</td>
</tr>
<tr>
<td>Originator</td>
<td>The originator of the time transaction is the department timekeeper who extracts and begins time entry on the Electronic Approvals of Time Entry Form (PHATIME). Only an originator of a time transaction may update information in the daily breakdown area of the form once time entry has begun and the status displayed is In Progress. Other department timekeepers may access this information but cannot change it as long as they have similar security privileges. There are two exceptions to this rule. A proxy may change time if querying a record started by someone else or a super-user may change time at any time.</td>
</tr>
<tr>
<td>Proxy</td>
<td>Someone who can act on another person’s behalf to approve or access a time sheet. The time entry proxy has access to the Electronic Approvals of Time Entry Form (PHATIME) and the Departmental Approval Summary Form (PHADSUM). If the proxy is acting on behalf of a super-user, then the proxy also has super-user privileges and can change or approve all time transactions, not just those for the person for whom he/she is acting.</td>
</tr>
<tr>
<td>Super-user</td>
<td>An individual who can change or approve all time transactions. A super-user has access to the Electronic Approvals of Time Entry Form (PHATIME) and the Departmental Approval Summary Form (PHADSUM) once a pay period has closed. As a super-user, you do not have to enter a time sheet organization in the key of PHATIME, PHADSUM, or PHIETIM, unless you wish to work with records in only one organization. When you move into the detail blocks of each of these forms you’ll see all employees in the pay event regardless of the time sheet organization. Super-users can interact with a time entry transaction at any time, except when the transaction is completely approved. If a super-user has originated the time transaction then they must complete it and submit it for approval. On PHATIME, time transactions that are In Progress attain a Pending transaction status when the super-user submits them. The approver then determines if the incomplete time is correct. If the super-user were to submit time that goes into Error status (instead of Pending), the approver and/or the super-user has the power to correct the time and approve it.</td>
</tr>
<tr>
<td>Pending Transaction Status</td>
<td>The transaction status for timesheets submitted for approval by a department originator. The timesheets remain in the Pending transaction status throughout the approval process, until the timesheets have been fully approved or returned for correction.</td>
</tr>
<tr>
<td>Submit for Approval</td>
<td>The approval process for timesheets after the department originator submits a timesheet for approval. The transaction status changes from In Progress to Pending.</td>
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</table>
Frequently Asked Questions (FAQs)

Q: I am trying to extract an employee for leave entry but I cannot find them. What should I do?
A: Several things can happen that can make it difficult to find a user. Verify that:
  • You have completed the form correctly. The Time Entry Method is set to Leave Report, you have
    specified the correct department code, the Transaction Status field is set to Not Started, the Year
    is correct, the Leave ID is B1, and the Leave Number is correct.
  • You have not already extracted the employee in this leave period. Check the Transaction Status
    of In Progress to confirm this.
  • The organization you are entering for the employee is correct. Employees are organized on
    PHATIME based on the timesheet organization found on their Employee Jobs (NBAJOBS) form
    in Banner. If you do not have access to this form, you can contact HR to verify their correct
    timesheet organization.

Q: I have extracted a user for leave entry. When I go to select this employee to start entering time, I
notice that they have two records available. How do I know which record to select?
A: This is most likely because the employee is set up with multiple job suffixes in Banner. If you see the
employee listed more than once, ensure that you are selecting the record with the correct position
number. Further, ensure that the record you select is the job with Suffix 00.

Q: When I try to enter leave for an employee, I get a message that says “Field protected against update”.
How can I finish the leave entry?
A: This may be because you are trying to enter leave for an employee that you did not extract. If you did
not originally extract an employee in a specific leave period, you can only enter leave for that employee if
you are designated as a proxy for the originator that extracted the employee in this period or if you have
been granted Super-user permissions.

Q: Why did only a partial pay period display on Self-Service or PHATIME?
A: The days displayed for entry on Employee Self-Service or on the Electronic Approvals of Time Entry
Form (PHATIME) are based the effective dates on the Employee Jobs Form (NBAJOBS). If the job has a
status of terminated, any dates beyond the effective date of the terminated job record will not display.
Also, if the job begins halfway through the pay period, time may not be submitted prior to the start date.
Additionally, the employee may have had a Time Sheet Organization change within the payroll period and
may be split into two time sheets. If a payroll ID change took place in the middle of a pay period, two
separate time sheets for each pay period also display only partial dates of a pay period.

Q: If I am the originator of the transaction, why am I unable to enter time for employees now when I could
enter it earlier in the day and yesterday?
A: Verify that the leave entry period is not closed for time entry according to the limits specified on the
Payroll Calendar Rule Form (PTRCALN). Once the time deadline has passed, only a super-user can take
action on a time sheet on PHATIME. If the leave entry period is open but you are still encountering
issues, try logging off of Banner and then on again before contacting HR.

Q: Why can’t I rollback when I am on an empty time entry line on PHATIME?
A: The system reserves a blank record when you access a new record in this block. This blank record
must be deleted before you can continue. Use the Remove Record function to delete the record.

Q: Why, as an originator, am I unable to update In Progress time transactions on PHATIME? I’ve also
designated myself as a super-user on the form.
A: If you are an originator, but are acting as a super-user since the super-user box is checked, you are
not able to update records until the pay period is closed. If you want to enter time at an In Progress status
as an originator, uncheck the super-user box. Super-users can only update records after the pay period is closed.

Q: Why can’t I restart the time transaction if I am a super-user?
A: Only an originator can restart the time transaction.

Q: Why can’t I submit the time transaction if I am a super-user?
As a super-user, you cannot submit the entry unless the pay period is closed.

Q: As an approver, I reviewed employee’s records that I needed to approve. Why did nothing happen when I selected Save?
A: Employees are only approved when the Approve/Acknowledge check box is checked for approval and the Apply All action is selected from the navigation frame.

Q: When I sign on to Banner and navigate to a Human Resources form, why do I get the message, “You have Electronic Approvals Transactions. Do you wish to view them now?”
A: You have been added to the Time Entry with Approvals routing queue as an approver or acknowledger and an action has been submitted to your queue that requires your approval or review. The system takes you directly to the Department Approval Summary Form (PHADSUM) when you select Yes.

Q: What is the difference between “You have Electronic Approvals Transactions. Do you wish to view them now?” and “Do you wish to be notified of new transactions during the current session”?
A: The first message notifies you that some action has been submitted for your approval or review and allows you to navigate directly to PHADSUM for approvals. The second message gives you the option to have a notification message appear if any new transactions are submitted to your approver/acknowledger queue during the current Banner session. This message appears when you move in and out of Human Resource forms.

Q: As a timekeeper, how do I correct records the approver has returned to me?
A: In order for you to view the records, you will have to change your status to “Return for Correction”. If the employee in question wasn’t supposed to have leave, you can click on the employee’s name and from the menu, select Record, click Remove. This action will bring the employee back to the “Not Started” status.

If you keyed the incorrect hours for leave, you can click on the Hours field and change the hours or delete the hours and key it to another date in that leave period.

If you have entered the incorrect earn code, you will have to click on the earn code, then from the menu, click Record and click Remove. This will delete the transaction. You can now add the correct earn code. Once entered, click save, then from the options menu, submit for approval.