TIME APPROVER USER GUIDE

Department of Human Resources
Banner 9

Contents

Reviewing and Approving Timesheets – Department Approver

At the end of a pay period, Department Approvers must review all time entered reports for which they are responsible to either approve or correct them. At this point, the Time Keeper has submitted timesheets for approval. 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 his/her time sheets for the current pay period to ensure each timesheet is in a status that will allow it to be approved. Available statuses are:
    - **Not Started** – Time sheets that have not been extracted for time entry on PHATIME
    - **In Progress** – Time sheets that have extracted and are ready to be edited or in the process of being edited.
    - **Pending** – Time sheets that have been submitted to the Department Approver. Time entry has been completed. A Time Keeper cannot make changes unless time sheets are returned for correction.
    - **Approved** – Time transactions have been approved by the Department Approver(s). Time sheets cannot be changed was once approved.
    - **Completed** – The time entered is updated in the system to the applicable holding table until ready to be processed by Payroll.
    - **Error** – Time sheets 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 by using the "View Errors" found in the RELATED menu.
    - **Return for Correction** – Time transactions that have been returned to the Department Originator (Time Keeper) by a Department Approver during the approval process. These transactions need to be corrected by the Time Keeper 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.

The Department Approver (or their Proxy) cannot start the approval process until the time entry period is open and originators have submitted time.

NOTE: If changes are required to an employee's time worked **after it has been approved or after the time entry period has closed**, the department will have to request Human Resources to make these changes subject to time restrictions.

Approving Timesheets

When you first open Banner and you have time approvals pending, you will be prompted to view these timesheets. A message box will displayed…. *"You have Electronic Approvals Transactions. Do you with to view them now? Click Yes*

- If you click YES to the Banner message, you will be taken directly to the Department Payroll Summary PHADSUM page.
- If you click NO to the Banner message, you will have to navigate to the Department Payroll Summary PHADSUM page, when you are ready to approve.

Another message will be displayed…. *"Do you wish to be notified of new transactions during the current session?" Click Yes,*

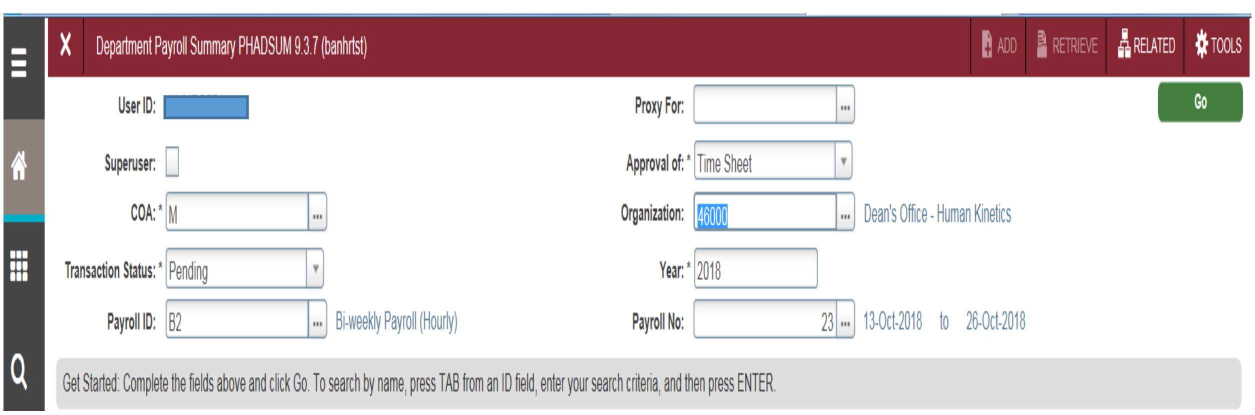
- If you would like to be notified by your department while you are logged onto Banner. Or if you click NO, you will receive no notifications, you will have to go to PHADSUM or contact the time keeper to see if time has been submitted for approval.

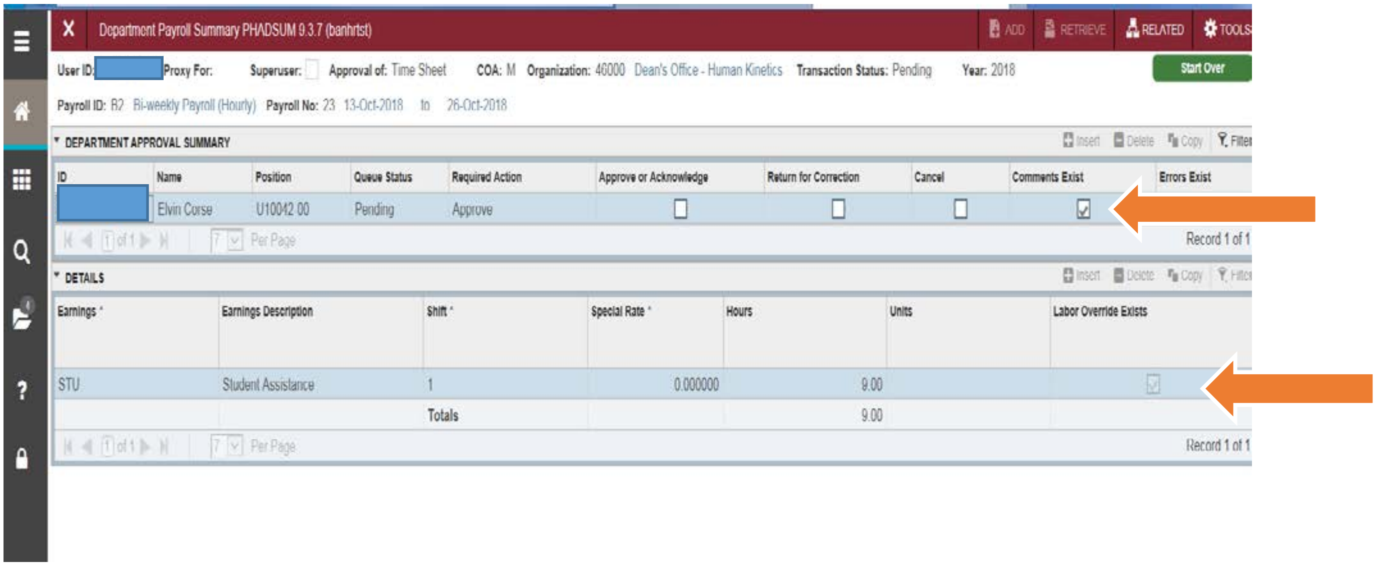
The Departmental Approver can use two forms to review, edit and approve timesheets.

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

To approve time entered PHADSUM

1. In the Search box on the Welcome page of Banner's home page; type PHADSUM and enter.
2. Enter the Organization number
3. Tab to the Transaction Status and select Pending
4. Tab to the Year field and enter the year
5. Payroll ID should be B1 or B2
6. Enter the Payroll number. Note: the pay period must be opened in order to extract timesheets.
7. Click the Go Button





Please note the check marks in the Comments Exist box and the Labor Override Exists box. The check marks are indicating that comments exist and a labor override exists and need to be reviewed by the approver.

To review comments in a timesheet

From the TOOLS menu, click on **View/Enter Comments**

The comments section will be displayed. In the **Previous Comments section**, you will see the comments the time keeper entered. If the comments are correct, click on TOOLS and click on Department Summary to bring you back to PHADSUM.

In the **Current Comments section** as the approver you can enter additional comments. Once comments have been entered by the approver, click save and click on TOOLS and click on **Department Summary** to bring you back to PHADSUM.

Once back in **PHADSUM**, you will need to view the details of the time entered. To do this, click on **RELATED** and **select View/change Time Detail PHATIME**. This page gives you the details of the hours entered. You can review all the time entered for students/employees on this page. If you have many students/employees you can change the number of records displayed by changing the number per page in the ID Block. Once you have reviewed all records and are ready to approve all entries, close PHATIME by clicking on the X in the top left hand corner. This action will bring you back to PHADSUM.

To review Labor Overrides

1. Click on RELATED Menu and select View/Change Time Detail PHATIME
2. Click on the hours that have the labor distribute override applied
3. From the TOOLS menu, click on View/Override Labor Distribution

The Default Labor Distribution block and the Override Labor Distribution block are both displayed. Here the approver can see what the previous FOAPALs and the current changes to the FOAPALs.

To Review Error Status

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.

To view PHIDERR in PHADSUM, click on **RELATED** and select **View Errors/Warnings PHIDERR**. The error will be displayed in the Pay History Display Errors.

Once the errors are corrected, the Department Approver approves the timesheet.

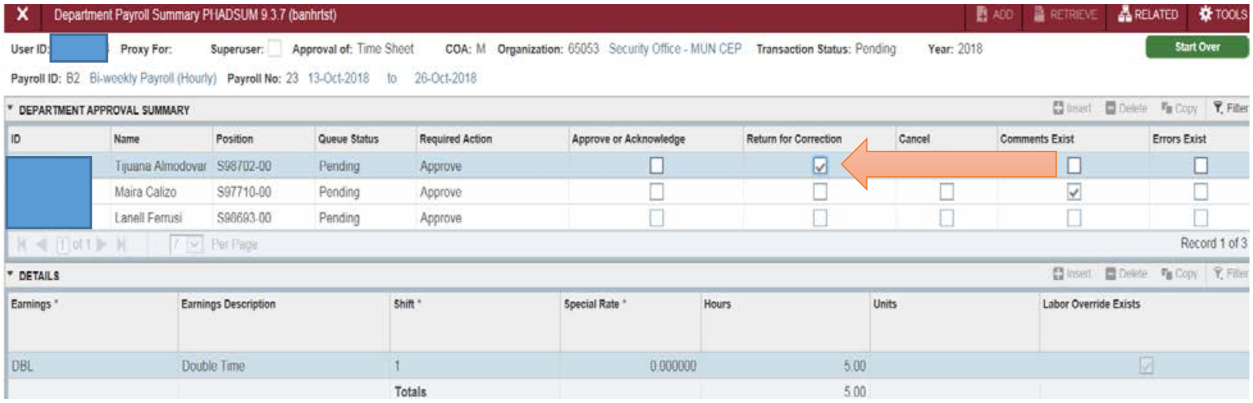
Approving

PHADSUM will only display the total hours, the detail (hours/dates) are not displayed. PHADSUM allows you to approve all entries at once, but you will need to review the details. To review the details, you will have to open PHATIME.

1. Once in PHADSUM, click **RELATED** menu, select **View/Change Time Detail PHATIME**
2. The student/employee's hours are displayed, click on their ID and in the Time Entry block, the details of the hours are displayed. Do this for each student/employee.
3. Once you have verified all the hours and dates are correct and you are ready to approve, close this form by clicking on the **X** in the top left hand corner of the page **or** you can approve the timesheet here by clicking on **TOOLS** and selecting **Approve Time**. Approving time on PHATIME will only approve one timesheet at a time. Approving on PHADSUM approves all the timesheets after you have reviewed them in PHATIME.
4. Check the **Approve or Acknowledge** check box for each student/employee. **Note**: you can do all at once or you can check one box at a time.
5. From the **TOOLS** menu, select **Apply All Actions**
6. Check the message box in the top right hand corner, you see a message Saved successfully.
7. To make sure the records were approved, click the start over button, change the status to **completed** and click the Go button. All records that were completed will be displayed here.

Returning timesheets for correction

If there is an incorrect time sheet that needs to be sent back to the time keeper, in PHADSUM check the **Return for Correction** check box. Then from the **TOOLS** menu, select **Apply All Actions**. The incorrect time sheet has been returned to the time keeper. ***Please Note, the approver will have to notify the time keeper that the time sheet has been sent back to them. There is no electronic message sent the time keeper.***

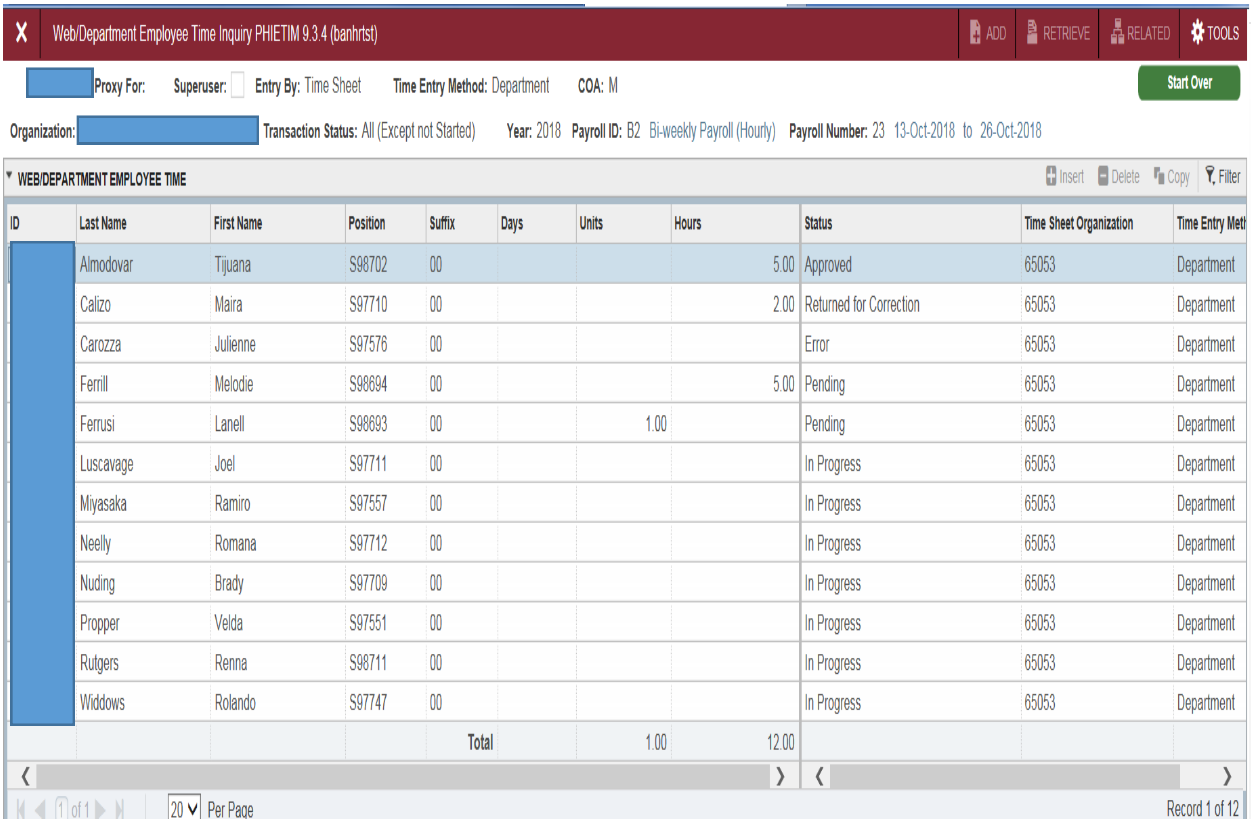


Reviewing Approved Time Records

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

Reviewing timesheets on PHIETIM

1. In the Search box on the Welcome page of Banner's home page; type PHIETIM and enter.
2. Enter the Organization number
3. Tab to the Transaction Status and select the Transaction Status
4. Tab to the Year field and enter the year
5. Payroll ID should be B1 or B2
6. Enter the Payroll number
7. Click the Go Button



Web/Department Employee Time Inquiry PHIETIM 9.3.4 (banhrst)

ADD RETRIEVE RELATED TOOLS

Proxy For: Superuser: Entry By: Time Sheet Time Entry Method: Department COA: M Start Over

Organization: Transaction Status: All (Except not Started) Year: 2018 Payroll ID: B2 Bi-weekly Payroll (Hourly) Payroll Number: 23 13-Oct-2018 to 26-Oct-2018

WEB/DEPARTMENT EMPLOYEE TIME

Insert Delete Copy Filter

ID	Last Name	First Name	Position	Suffix	Days	Units	Hours	Status	Time Sheet Organization	Time Entry Met
	Almodovar	Tijuana	S98702	00			5.00	Approved	65053	Department
	Calizo	Maira	S97710	00			2.00	Returned for Correction	65053	Department
	Carozza	Julienne	S97576	00				Error	65053	Department
	Ferrill	Melodie	S98694	00			5.00	Pending	65053	Department
	Ferrusi	Lanell	S98693	00		1.00		Pending	65053	Department
	Luscavage	Joel	S97711	00				In Progress	65053	Department
	Miyasaka	Ramiro	S97557	00				In Progress	65053	Department
	Neelly	Romana	S97712	00				In Progress	65053	Department
	Nuding	Brady	S97709	00				In Progress	65053	Department
	Propper	Velda	S97551	00				In Progress	65053	Department
	Rutgers	Renna	S98711	00				In Progress	65053	Department
	Widdows	Rolando	S97747	00				In Progress	65053	Department
				Total		1.00	12.00			

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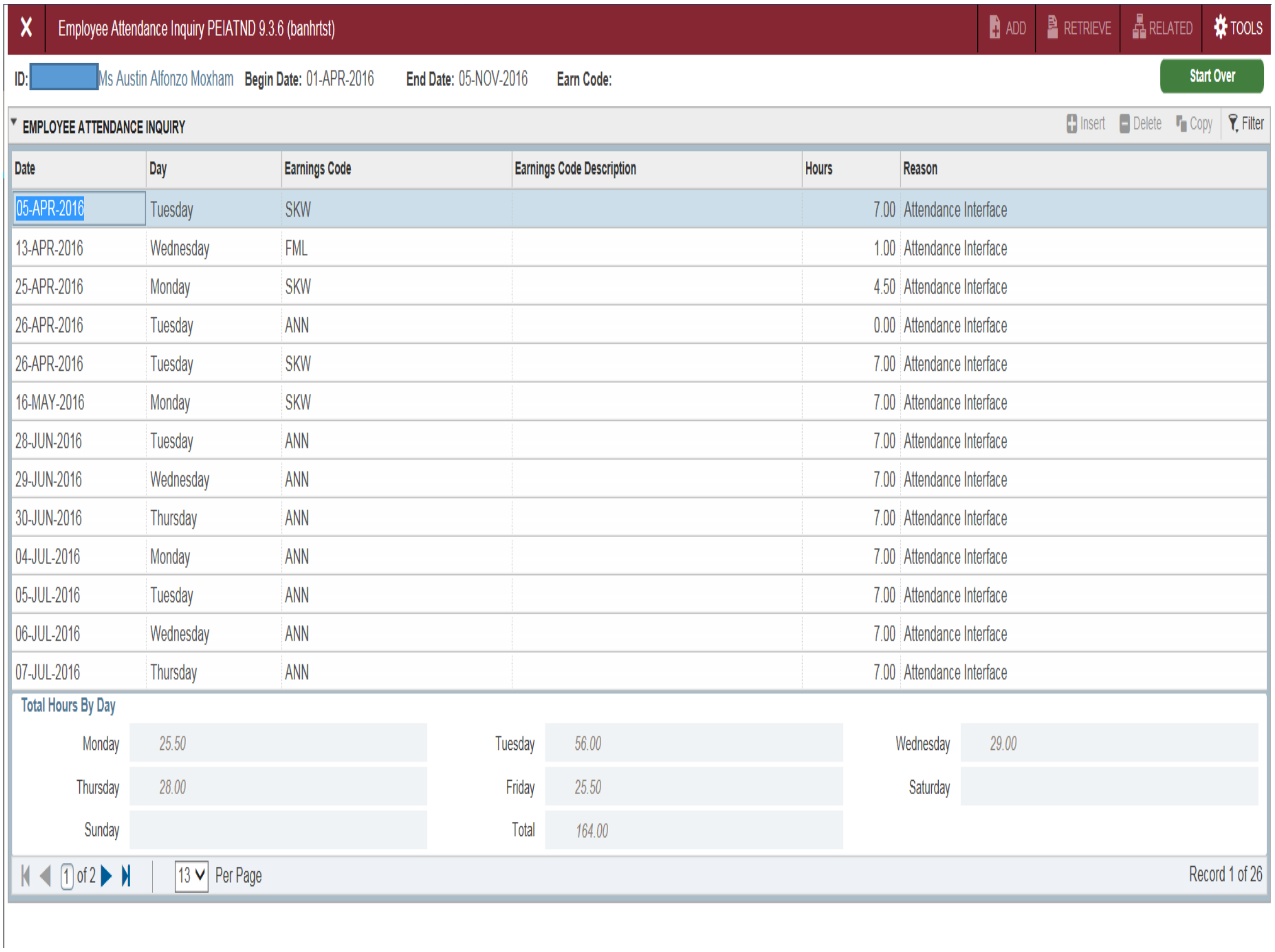
IMPORTANT: You can also utilize this screen to ensure that there is nothing left in the category "In progress" that was not submitted for approval.

Reviewing Employee Attendance Records

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

Reviewing employee attendance records

1. In the Search box on the Welcome page of Banner's home page; type PEIATND and enter.
2. Enter the ID number for the employee you wish to view
3. (Optional) Enter Begin Date, End Date, and/or Earn Code to further filter for the pay period and type to report. i.e. you can enter one Earn Code to see just that particular earnings displayed or leave the Earn Code field blank to see all time entered/complete for the time frame selected.
4. Click the Go Button



Employee Attendance Inquiry PEIATND 9.3.6 (banhrtst) ADD RETRIEVE RELATED TOOLS

ID: [redacted] Ms Austin Alfonzo Moxham Begin Date: 01-APR-2016 End Date: 05-NOV-2016 Earn Code: Start Over

EMPLOYEE ATTENDANCE INQUIRY Insert Delete Copy Filter

Date	Day	Earnings Code	Earnings Code Description	Hours	Reason
05-APR-2016	Tuesday	SKW		7.00	Attendance Interface
13-APR-2016	Wednesday	FML		1.00	Attendance Interface
25-APR-2016	Monday	SKW		4.50	Attendance Interface
26-APR-2016	Tuesday	ANN		0.00	Attendance Interface
26-APR-2016	Tuesday	SKW		7.00	Attendance Interface
16-MAY-2016	Monday	SKW		7.00	Attendance Interface
28-JUN-2016	Tuesday	ANN		7.00	Attendance Interface
29-JUN-2016	Wednesday	ANN		7.00	Attendance Interface
30-JUN-2016	Thursday	ANN		7.00	Attendance Interface
04-JUL-2016	Monday	ANN		7.00	Attendance Interface
05-JUL-2016	Tuesday	ANN		7.00	Attendance Interface
06-JUL-2016	Wednesday	ANN		7.00	Attendance Interface
07-JUL-2016	Thursday	ANN		7.00	Attendance Interface

Total Hours By Day

Monday	25.50	Tuesday	56.00	Wednesday	29.00
Thursday	28.00	Friday	25.50	Saturday	
Sunday		Total	164.00		

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

Reviewing the PWRTIME report

PWRTIME - This report provides a summary of time keyed in PHATIME. It should be ran prior to and after approvals are completed to ensure all time has been processed accurately. If there are any hours “in progress” or “in error” this will give you the opportunity to correct prior to cut off for the pay period.

1. In the Search box on the Welcome page of Banner’s home page; type PWRTIME and enter.
    - This will bring you to the Process Submission Controls Form GJAPCTL
    - In the process field, PWRTIME should be displayed.
    - Parameter Set should be blank

2. Click on the Go button
    - DATABASE should be displayed in the Printer Control block.
    - All other fields can be left blank

3. Move to the Parameter Values block by clicking in the Year Values field. Year Format YYYY
    - Enter the Year
    - Enter the Pay ID – BI, B2 or M1
    - Enter the Time Sheet Organization From
    - Enter the Time Sheet Organization To
    - Create CSV (Excel) format Y or N
4. When all parameters have been entered Click in the Save Parameter Set as field
5. Click on the Save button at the bottom right hand of the page

After the parameters have been saved, you will notice messages in the upper right hand corner.

These messages confirm that the parameters have been saved and a log file was generated for the report. Click on the number (of messages) just above the messages to remove them.

Reviewing the Report:

1. Click on the Related Menu
2. Click on PDF Review Output (GWAVRPT)
3. Click on the report you want to view and click on the SEL button (top left hand corner) to display your report. The .lst is the PDF format and CVS format is the Excel version.
4. If your report isn't displayed when you arrive on this page, click F5 to refresh until the report name is displayed.

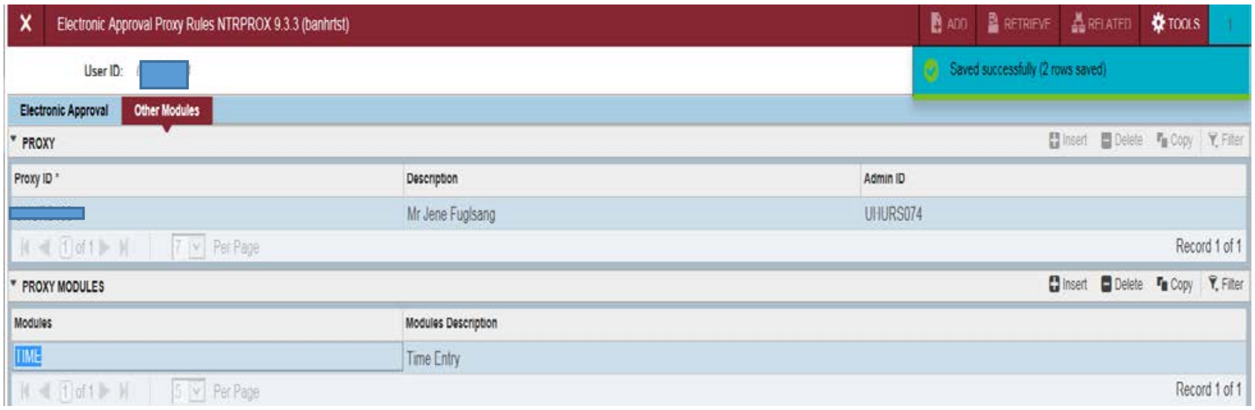
Managing Proxies - Department Originator/Approver

The Electronic Approval Proxy Rules Form (NTRPROX) is used to establish a Proxy 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 a Proxy, the Proxy security access must be confirmed (HR must set this up). Once security access is established, the process for creating a Proxy is simple.

Adding a Proxy

1. In the Search box on the Welcome page of Banner's home page; type NTRPROX and enter.
2. In the User ID field, your user ID will be displayed, click the Go button
3. Click on the Other Modules tab
4. In the Proxy ID field enter your proxy's User ID and tab. (In the Description field, your proxy's name will populate.)

5. Click in the Proxy Modules field, enter TIME
6. Save by clicking the save button in the bottom right hand corner
7. You have more than one proxy, do add another proxy, click on the insert button and repeat the above steps.

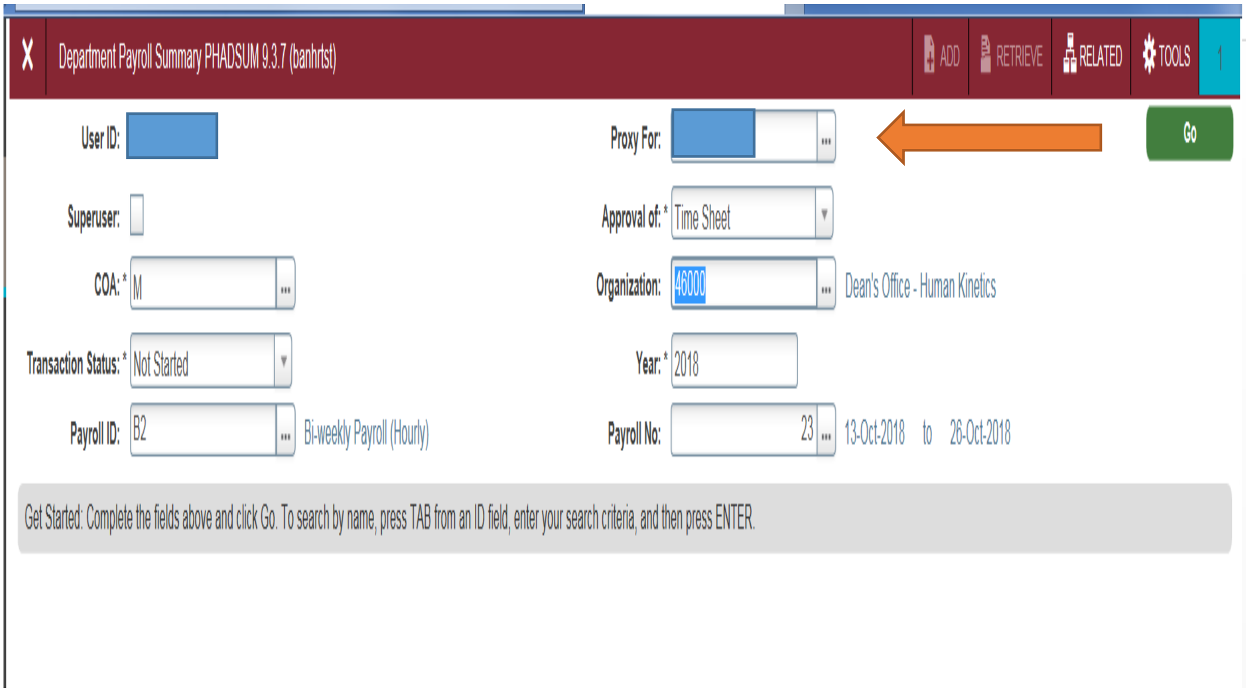


Deleting a Proxy

1. In the Search box on the Welcome page of Banner's home page; type NTRPROX and enter.
2. In the User ID field, your user ID will be displayed, click the Go button
3. Click on the Other Modules tab
4. Click in the Proxy Modules field on TIME
5. Click Delete in this block
6. Click Save. Note: the word TIME should be gone
7. In the Proxy ID field, click your proxy's User ID
8. Click Delete and then Save. Note: your proxy's name and ID have be removed
9. Exit
10. If you have more than one proxy that needs to be removed. Follow the above steps, starting with removing TIME first. Remember to save after each deletion.

Acting as a Proxy

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.


X
Department Payroll Summary PHADSUM 9.3.7 (banhrtst)
ADD
RETRIEVE
RELATED
TOOLS
User ID:
Proxy For:
Go
Superuser:
Approval of: *
Time Sheet
COA: *
M
Organization:
46000
Dean's Office - Human Kinetics
Transaction Status: *
Not Started
Year: *
2018
Payroll ID:
B2
Bi-weekly Payroll (Hourly)
Payroll No:
23
13-Oct-2018 to 26-Oct-2018
Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

Frequently Asked Questions (FAQs)

Q: I am trying to extract an employee for time 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 PHATIME correctly. The Entry By field is set to "**Time Sheet**"; Time Entry Method is set to "**Department**", you have specified the correct organization code which corresponds to your department, the Transaction Status field is set to "**Not Started**", the calendar Year is correct, the Payroll ID field (B1/B2) is correct for the employee, and that the Payroll Number is correct.
• You have not already extracted the employee in this pay period. Change the Transaction Status to "***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 specified on their Employee Jobs (NBAJOBS) form in Banner. Step 1 is to run the report **PWRRDPL** before starting time entry to ensure all required employees are listed. This report will give you all the information that is currently setup on NBAJOBS and you can verify the information is correct and available before starting. If you have an employee that is missing a position, first verify that the necessary paperwork was submitted to HR prior to current cutoff dates. If you have missed a cutoff, time will have to be entered in the next pay period. If submitted prior to cut off, please contact MyHR (ext. 2434).

Q: I have extracted a user for time entry. When I go to select this employee to start entering time, I notice that they have two positions available. How do I know which record to select?

A: This is because the employee has multiple positions in Banner HR. If you see the employee listed more than once, ensure that you are selecting the correct position number. You can determine the correct position by running **PWRRDPL** and reviewing the FOAPAL each position is being charged to. Based on the FOAPAL, ensure that you select the appropriate job-suffix.

Q: When I try to enter time for an employee, I get a message that says "Field protected against update". How can I finish the time entry?

A: This may be because you are trying to enter time for an employee that was extracted by another user. If you did not originally extract an employee in a specific pay period, you can only enter time for that employee if you log in as proxy for the originator that extracted the employee in this pay period.

Q: Why did only a partial pay period display on PHATIME?

A: The dates displayed for entry on PHATIME are based the effective dates on the Employee Jobs Form (NBAJOBS). If the job has a status of terminated, any dates beyond the termination date will not display. Also, if the job begins halfway through the pay period, time may not be keyed prior to the start date.

Additionally, 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: Why won't my report open?

A: The pop-up blocker may be enabled on your internet browser. Disable the pop-up blocker for this site and try again. You may be required to exit and log back into Banner for changes to take effect.

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 time entry period is not closed for time entry. Once the time deadline has passed, time cannot be entered in PHATIME. If the time entry period is open but you are still encountering issues, try logging off of Banner and then on again before contacting Kim Slaney HR Technology.

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 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 Transaction's; 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: I need to override labor distributions for some earnings being submitted, but when I enter the applicable FUND/ORG I receive an error and I am unable to save, why?

A: The Override Labor Distribution process has restrictions in place depending upon the Employee class and FOAPAL. The code being entered must be active and marked for data entry. A further restriction is there are defaults setup within Banner Finance for FUND and ORG combinations. If you receive an error please check with your approver. It may be necessary to check with financial services to confirm the information. If you are unable to confirm the information within the timeframe for submission to HR it will be necessary to allow to default. You may submit labor redistributions at a later date if necessary to HR.

Please remember that during payroll processing, certain FOAPAL overrides will occur automatically and will overwrite Override Labor Distributions performed in PHATIME. These include earning codes:

Earnings Code	FOAPAL (account)
SH3/SH4	63508- Shift Differential
OTA/DBL	63509- Regular Overtime
TAS/TPS	63028 – Temporary Assignments