

# Banner Human Resources Web Time Entry Training Workbook

MAY 2006

RELEASE 7.2



**SUNGARD** HIGHER EDUCATION

What can we help you achieve?

*C O N F I D E N T I A L   B U S I N E S S   I N F O R M A T I O N*

---

This documentation is proprietary information of SunGard Higher Education and is not to be copied, reproduced, lent, or disposed of, nor used for any purpose other than for which it is specifically provided without the written permission of SunGard Higher Education.

Prepared By: SunGard Higher Education  
4 Country View Road  
Malvern, Pennsylvania 19355  
United States of America

© 2004-2006 SunGard. All rights reserved. The unauthorized possession, use, reproduction, distribution, display or disclosure of this material or the information contained herein is prohibited.

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.



# Table of Contents

<b>Section A: Introduction</b> .....	<b>4</b>
Overview .....	4
Process Introduction .....	5
Overview of Time Entry and Approvals Processing.....	6
<b>Section B: Set Up</b> .....	<b>8</b>
Overview .....	8
Forms that Support Web Time Entry .....	10
Payroll Identification Rule Form.....	11
Payroll Calendar Rule Form.....	13
Shift Premium Rule Form .....	15
Employee Class Rule Form.....	17
Installation Rule Form.....	21
Employee Jobs Form.....	22
Electronic Approval Category Code Validation .....	24
Position Control Installation Form .....	25
Routing Queue Rule Form .....	26
Override Routing Queue Form.....	28
Position Definition Form.....	30
Electronic Approval Proxy Rule Form.....	31
User Codes Rule Form .....	33
Self Check .....	34
Answer Key.....	35
<b>Section C: Day-to-Day Operations</b> .....	<b>36</b>
Overview .....	36
Process Introduction .....	38
Outline of Approval Routing Process .....	39
Entering Time Through the Web.....	41
Approving Time Using PHADSUM .....	47
Approving Time Through the Web .....	52
Pulling Information into Payroll.....	57
Web Leave Request: Enter or Approve.....	58
PROXY Set-Up through the Web .....	61
Self Check .....	63
Answer Key.....	65
<b>Section D: Reference</b> .....	<b>67</b>
Overview .....	67
Setup Forms and Where Used.....	68
Day-to-Day Forms and Setup Needed.....	69
Forms Job Aid .....	70



## Section A: Introduction

### Lesson: Overview

◀ Jump to TOC

#### **Workbook goal**

The goal of this workbook is to provide you with the knowledge and practice to set up and fully access the web for time entry function at your institution. The workbook is divided into four sections:

- Introduction
- Set-Up
- Day-to-day operations
- Reference

#### **Intended audience**

Human Resources Office Administrators and Staff.

#### **Section contents**

Overview .....	4
Process Introduction .....	5
Overview of Time Entry and Approvals Processing.....	6



## Section A: Introduction

### Lesson: Process Introduction

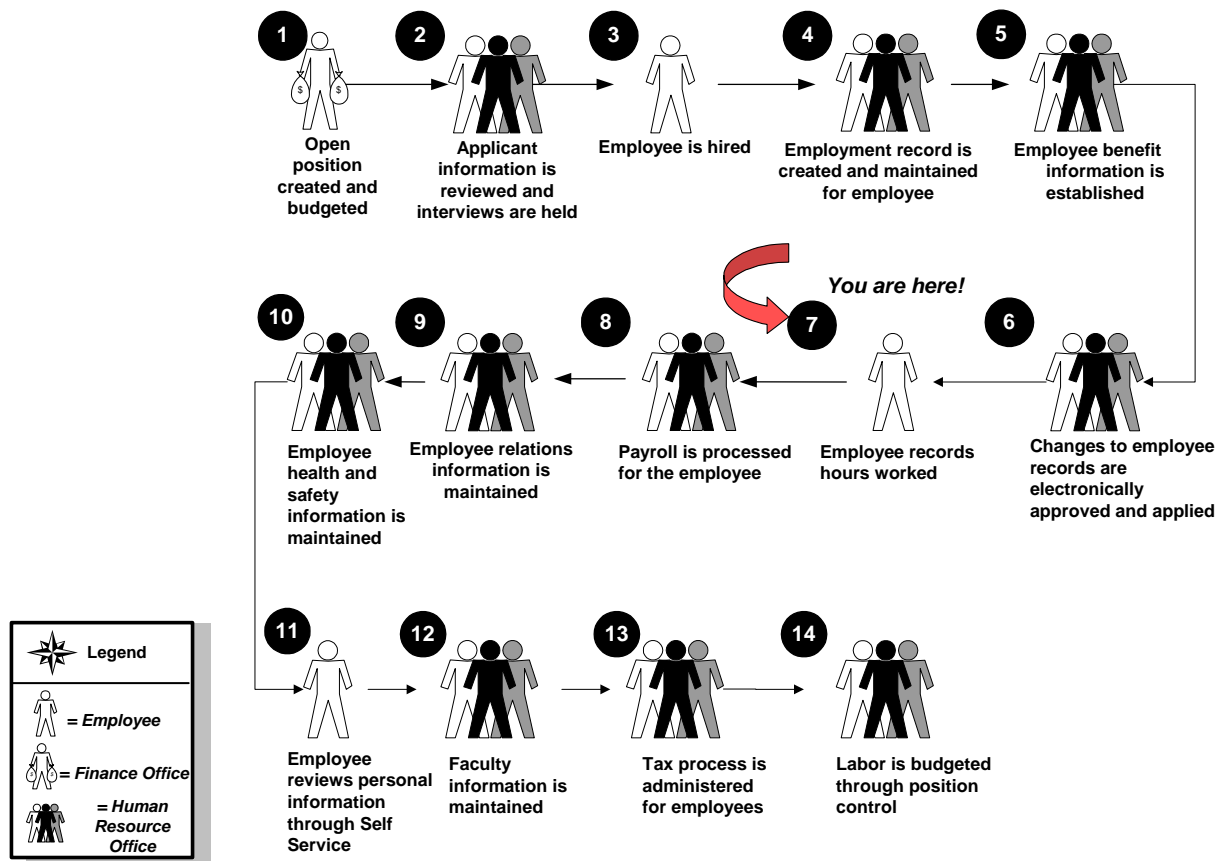
◀ Jump to TOC

#### Introduction

The Banner Web Time Entry process is provided to allow employee's 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.

#### Flow diagram

This diagram highlights the processes used by employees to record their time over the web within the overall Human Resources process.



#### About the process

- Human Resources activates all the Banner forms to be displayed on the web.
- Employees enter time through the web.
- Supervisor approves time or sends it back for correction, if necessary.



## Section A: Introduction

### Lesson: Overview of Time Entry and Approvals Processing

◀ [Jump to TOC](#)

#### **Entering time for approval**

Through the web, an employee can start time entry or choose to continue entering data for a previous period. Once the system determines that a payroll requires entry, an initial extract process gathers the default information for the pay period. This extract process can be equated to an initial extract of the Pay Period Extract Process (PHPTIME). 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 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. During each time entry session, time can be reported or requested for a single day or for several days. Time can be entered throughout the time entry period. After completing a time sheet or leave request, the employee or departmental timekeeper can submit it for approval. Approvers can choose to update or change employee 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 or returned to the first approver in the queue. When there is only one approver in the queue and the rule specifies that time goes back to the first approver in the queue, the time sheet will remain with that approver for correction. Web leave requests always go back to the employee on the Web for correction.

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.

There is no notice to the employee or originator that the timesheet was returned for correction.

Note: 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 then return the time sheet or leave request for correction.



## Section A: Introduction

### Lesson: Overview of Time Entry and Approvals Processing (Continued)

◀ [Jump to TOC](#)

#### **Transaction status**

Time entered over the Web is always associated with a transaction status. The transaction status represents where 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. After a time sheet is approved, the Mass Time Entry Process (PHPMTIM) moves the data from the 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.

#### **Processing of leave requests**

A leave request can be entered by an employee on the Web. All leave requests must go through the approval process. When the pay period for which the leave has been requested is started and the requested time has not been returned for correction, the requested time is copied to the employee's time sheet. The employee can then make any necessary changes to the time information and submit the time sheet for approval.



## Section B: Set Up

### Lesson: Overview

◀ [Jump to TOC](#)

#### **Introduction**

The purpose of this section is to outline the set-up process used to govern employees' access to the time entry Web pages and to control the data entered on these Web pages.

#### **Intended audience**

Human Resources Office Administrators

#### **Objectives**

At the end of this section, you will be able to

- enter the appropriate data on the forms used to provide access to time entry on the Web.

#### **Prerequisites**

To complete this section, you should have

- completed the Education Practices computer-based training (CBT) tutorial “Banner 7 Fundamentals,” or have equivalent experience navigating in the Banner System
- completed the Human Resources Overview workbook
- completed the Human Resources Time Entry and Payroll Processing workbook
- completed the Human Resources Electronic Approvals workbook
- administrative rights to create the rules and set the validation codes in Banner.





## Section B: Set Up

### Lesson: Overview (Continued)

◀ [Jump to TOC](#)

#### Section contents

Overview .....	8
Forms that Support Web Time Entry .....	10
Payroll Identification Rule Form.....	11
Payroll Calendar Rule Form.....	13
Shift Premium Rule Form .....	15
Employee Class Rule Form.....	17
Installation Rule Form.....	21
Employee Jobs Form .....	22
Electronic Approval Category Code Validation .....	24
Position Control Installation Form .....	25
Routing Queue Rule Form .....	26
Override Routing Queue Form.....	28
Position Definition Form.....	30
Electronic Approval Proxy Rule Form.....	31
User Codes Rule Form .....	33
Self Check .....	34
Answer Key.....	35



## Section B: Set Up

### Lesson: Forms that Support Web Time Entry

◀ Jump to TOC

#### **Banner forms supporting Web Time Entry**

The following forms are used to allow employee access to the time entry web pages and to control the data entered on the web pages.

<b>Form Name</b>	<b>Form Description</b>
PTRPICT	Payroll Identification Rule Form
PTRCALN	Payroll Calendar Rule Form
PTRSHFT	Shift Premium Rule Form
PTRECLS	Employee Class Rule Form
PTRINST	Installation Rule Form
NBAJOBS	Employee Jobs Form
NTVACAT	Approvals Category Code Validation form
NTRINST	Position Control Installation Rule Form
NTRRQUE	Routing Queue Rule Form
NBAJQUE	Override Routing Queue Form
NBAPOSN	Position Definition Form
NTRPROX	Electronic Approval Proxy Rule Form
PTRUSER	User Codes Rule Form



## Section B: Set Up

### Lesson: Payroll Identification Rule Form

◀ Jump to TOC

#### Banner form

The Payroll Identification Rule Form (PTRPICT) controls time entry on the Web.

Payroll Identification Code Rules: PTRPICT 7.0 (C700)

<b>General</b>		<b>Pre-1997 Canadian UIC</b>	
Payroll ID:	<input type="text" value="EW"/> Bi-Weekly	ROE Period Type:	<input type="text"/>
Pays Per Year:	<input type="text" value="26.0"/>	UI Minimum Hours:	<input type="text"/>
Tax Factor:	<input type="text" value="26"/>	UI Minimum Earnings:	<input type="text"/>
Bank:	<input type="text" value="A1"/> <input type="checkbox"/> First Bank of Downington	UI Maximum Earnings:	<input type="text"/>
	<input type="checkbox"/> Supplemental Pay	UI Weeks:	<input type="text"/>
Original Payroll ID:	<input type="text"/>		
<b>Values to Default for Pay Period Time Entry</b>			
Cut Off Date for Pay Period Reports:	<input type="text"/> Day(s)	<input type="text" value="Prior To"/> <input type="text"/>	Last day of the pay period
Cut Off Time of Day:	<input type="text"/>		
Access Pay Period Reports on Web for:	<input type="text"/> Month(s)		
Can Request Leave in Advance:	<input type="text"/> Pay Period(s)		
Activity Date:	<input type="text" value="08-JUN-1994"/>		



## Section B: Set Up

### Lesson: Payroll Identification Rule Form (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Payroll Identification Rule Form (PTRPICT).
2	<p>In the <b>Cut Off Date for Pay Period Reports</b> field, enter the date that the time sheets are due to the approver. Enter the number of days before or after the last day of the pay period in which time entry must be completed on the Web or PHATIME.</p> <p><u>Notes:</u> The approver has a separate deadline for when to submit timesheets to payroll. The approval deadlines are procedural; they are not entered in Banner.</p> <p>If the due dates are different by employee class and Pay ID, a new PTRPICT value may need to be created.</p>
3	In the <b>Cut Off Time of Day</b> field, enter the time of day that signifies that no entry can be done after this time of day on the cut off day.
4	<p>In the <b>View Pay Period Reports on Web For</b> field, enter the number of months an employee can view the records on the Web.</p> <p><u>Notes:</u> If the value is null, the employee sees only the current pay period.</p> <p>It is recommended that the institution starts out with few to no pay periods open for view. This reduces the misconception that you can update prior pay periods on the Web.</p> <p>Records entered on PHAHOUR only are not viewed on the Web.</p>
5	<p>In the <b>Can Request Leave in Advance</b> field, enter the number of pay periods in advance that an employee can request leave.</p> <p>This value cannot be overridden. This value can be null.</p>
6	Click the <b>Save</b> icon.
7	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Payroll Calendar Rule Form

◀ Jump to TOC

#### Purpose

The Payroll Calendar Rule Form (PTRCALN) controls time entry on the Web for pay period reporting. Basically, this form determines when an employee can enter and/or view records on the Web. Moreover, when time entry can be submitted from the Web.

#### Banner form

Payroll Calendar Rules PTRCALN 7.2 (s4b7D)

Year	Payroll ID	Payroll Number	Pay of Month	Start Date	End Date	Check Date	Web and Department Time Entry From Date	Web and Department Time Entry To Date	Time of Day to StopTime Entry
>> 2008	PL	3	1	15-JAN-2008	15-FEB-2008	15-FEB-2008	15-JAN-2008	14-FEB-2008	11:00 AM
2008	PL	4	2	16-FEB-2008	29-FEB-2008	29-FEB-2008	16-FEB-2008	28-FEB-2008	11:00 AM
2007	MN	1	1	01-JAN-2007	31-JAN-2007	31-JAN-2007	01-JAN-2007	03-FEB-2007	05:00 PM
2007	MN	2	1	01-FEB-2007	28-FEB-2007	28-FEB-2007	01-FEB-2007	03-MAR-2007	05:00 PM
2007	MN	3	1	01-MAR-2007	31-MAR-2007	31-MAR-2007	01-MAR-2007	03-APR-2007	05:00 PM
2007	MN	4	1	01-APR-2007	30-APR-2007	30-APR-2007	01-APR-2007	03-MAY-2007	05:00 PM
2007	MN	5	1	01-MAY-2007	31-MAY-2007	31-MAY-2007	01-MAY-2007	03-JUN-2007	05:00 PM
2007	MN	6	1	01-JUN-2007	30-JUN-2007	30-JUN-2007	01-JUN-2007	03-JUL-2007	05:00 PM
2007	MN	7	1	01-JUL-2007	31-JUL-2007	31-JUL-2007	01-JUL-2007	03-AUG-2007	05:00 PM
2007	MN	8	1	01-AUG-2007	31-AUG-2007	31-AUG-2007	01-AUG-2007	03-SEP-2007	05:00 PM
2007	UB	1	1	17-DEC-2006	30-DEC-2006	05-JAN-2007			

Pay Stub Message

Line 1:

Line 2:

Line 3:

Line 4:

Line 5:

Line 6:

Line 7:



## Section B: Set Up

### Lesson: Payroll Calendar Rule Form (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Payroll Calendar Rule Form (PTRCALN).
2	Use your horizontal scroll bar to access the fields below. These defaults need to be changed for pay periods with a holiday.
3	Enter the dates in the <b>Web &amp; Department Pay Period Time Entry Dates (From and To)</b> fields to specify the beginning and ending dates for time entry on the Web for PHATIME for that pay period.
4	Enter a time in the <b>Time of Day to Stop Time Entry</b> field that specifies the cut off time for time entry on the Web and PHATIME on the cut off day for the pay period.
5	Enter the date in the <b>Access on Web Until</b> field that specifies how long employees can view time entry information for the pay period on the Web.
6	Click the <b>Save</b> icon.
7	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Shift Premium Rule Form

◀ Jump to TOC

#### Purpose

The Time Entry Shift Hours window on the Shift Premium Rule Form (PTRSHFT) specifies the hours associated with the shift code whose premium information is being defined. (A shift code identifies the shifts worked by a particular group of employees, for example, administrative workers or cafeteria employees.) The fields within the window specify the start and end time of each shift and the days that the shift is in effect.

This form is only required if the client is using shifts. The Time Entry Shift hours window must be populated if the client is using the time in and out option.

#### Banner form

Shift	Percent	Rate	Activity Date
1	.00	.00	27-JUN-1995
2	.00	.25	03-JUN-1994
3	.00	50.00	03-JUN-1994

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Shift Premium Rule Form (PTRSHFT).
2	Double-click in the <b>Shift Code</b> field and select a shift from the Shift Code Validation Form.
3	Perform a <b>Next Block</b> function.
4	In the <b>Shift</b> field, enter a 1-digit value identifying the shift whose hours are being defined.
5	In the <b>Percent</b> and <b>Rate</b> fields, enter values.
6	Click the <b>Save</b> icon.
	<u>Note:</u> The <b>Activity Date</b> field self populates.



## Section B: Set Up

### Lesson: Shift Premium Rule Form (Continued)

◀ Jump to TOC

#### Options – Time Entry Shift Hours

Time Entry Shift Hours PTRSHFT 7.0 (C700)

Shift	Day of Week	Shift Start Time	Shift End Time	Activity Date
<input type="text"/>	Monday	AM	AM	19-NOV-2004
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

#### Procedures

Follow these steps to complete the process.

Step	Action
1	Select <u>Time Entry Shift Hours</u> from the <b>Options</b> menu.
2	In the <b>Shift</b> field, enter the shift.
3	Use the drop-down list to select a day of the week.  <u>Note:</u> If one or more days of the week are entered, then all shifts must be associated with a day of the week.
4	In the <b>Shift Start Time</b> and <b>Shift End Time</b> fields, enter the hours of the shift.  <u>Note:</u> Time format is hh:mm followed by a space and AM or PM. Select AM or PM from the drop-down list. The minutes figure must be a multiple of 15.
5	Click the <b>Save</b> icon.
6	Click the <b>Exit</b> icon.





## Section B: Set Up

### Lesson: Employee Class Rule Form

◀ Jump to TOC

#### Purpose

Two windows on the Employee Class Rule Form (PTRECLS) are used to specify time entry rules for the employee class being defined, the Time Entry Rules window and Eligible Earnings Codes window.

- The Time Entry Rules window includes general time entry rules.
- The Eligible Earnings Codes window associates eligible earning codes with the employee class being defined.

#### Banner form

Employee Class Rules PTRECLS 7.2 (s4b70)

Employee Class: 02 ▼

<b>Employee Class Descriptions</b> <b>Short:</b> Profesn <b>Long:</b> FT Professional	<b>Employee Defaults</b> <b>Leave Category:</b> A1 ▼ Administrators - Full Time <b>Benefit Category:</b> F1 ▼ Full Time Employees <b>Employee Group:</b> ▼ <b>Full-Time or Part-Time Status:</b> Full Time ▼
<b>Job Defaults</b> <input checked="" type="checkbox"/> <b>Default Hours</b> <b>Hours per Day:</b> 8.00 <b>Hours per Pay:</b> 173.33 <b>Payroll ID:</b> MN ▼ Monthly <b>Premium Pay:</b> ▼ <b>Longevity:</b> ▼ <b>Work Schedule:</b> ▼ <b>Deferred Pay:</b> DP01 ▼ Adjunct Spring Semester <b>Employer:</b> JC ▼ Julie's Employer for 7.0	<b>Payroll Calculation</b> <b>Salary Indicator:</b> Salaried ▼ <b>FLSA Method:</b> N/A ▼ <b>FLSA Period:</b> ▼ <b>Shift Code:</b> ▼

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Employee Class Rule Form (PTRECLS).
2	In the <b>Employee Class</b> field, select the <b>Search</b> function and select an employee class code from the Employee Class Query Form.
3	Perform a <b>Next Block</b> function.



## Section B: Set Up

### Lesson: Employee Class Rule Form (Continued)

◀ Jump to TOC

#### Options – Time Entry Rules

Time Entry Rules PTRECLS 7.2 (s4b70)

**Time Entry Method:** Employee Time Entry Via Web

**Time Entry Day:** Friday

**Printed Time Sheet Method:** Time Sheet (Individual)

**Payroll Time Entry Breakdown:** None

**Leave Report Entry Method:** None (Payroll)

**Leave Report Payroll ID:** MN Monthly

**Time Entry Approvals Rules**

**Time Entry Type:** Pay Period Exception Time Only

- Approval Required for Exception Time
- Time In and Out Required
- Can Request Leave in Advance
- Override Labor Distribution on Web
- Override Labor Distribution for Department



## Section B: Set Up

### Lesson: Employee Class Rule Form (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Select <u>Time Entry Rules</u> from the <b>Options</b> menu.
2	Select <i>Employee Time Entry Via Web</i> in the <b>Time Entry Method</b> field.
3	Select a type of time entry in the <b>Time Entry Type</b> field from the drop-down list.
4	Click the <b>Approval Required for Exception Time</b> check box.  <u>Note:</u> If exception time does not require approval, then it is automatically approved when the approver submits it.
5	Click the <b>Time In and Out Required</b> check box if all earnings codes must have a time in and out entered (e.g., regular pay, vacation, holiday).
6	Click the <b>Can Request Leave in Advance</b> check box if you allow the employees to request leave in advance.  <u>Note:</u> This only affects employees that accrue leave in that employee class. This check box is only applicable if the <b>Time Entry Method</b> field is set to Pay Period Exception Time Only.
7	Click the <b>Override Labor Distribution for Department</b> check box, and a new employee class will be set up.  <u>Note:</u> Check this box if the department keeper can access the labor distribution information on PHATIME and override any part of the default labor distribution.
8	Click the <b>Override Labor Distribution on Web</b> check box, if you want employees to override the values on the Web.  <u>Note:</u> Check this box if employees who enter time on the Web can access labor distribution information on the Web and override any part of the default labor distribution.
9	Click the <b>Save</b> icon.



## Section B: Set Up

### Lesson: Employee Class Rule Form (Continued)

◀ Jump to TOC

#### Options – Eligible Earnings

Earnings Code	Reduce Regular Hours	Attendance Indicator	Time Entry Sequence	Time Sheet Print Sequence	Approvers Indicator	Accrue Seniority	Activity Date
P 409 Income	<input type="checkbox"/>	<input type="checkbox"/>		6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	26-JAN-2006
ADR Advance Pay Recovery	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-JAN-1995
ADV Advanced Pay	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-JAN-1995
DOC Docked Pay	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	07-JUN-1994
HOL Holiday Pay	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	24-JUN-2004
PER Personal Leave Pay	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	24-JUN-2004
PRM Premium Pay	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	20-APR-2005
REG Regular Pay	<input type="checkbox"/>	<input type="checkbox"/>		1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	24-JUN-2004
SAB Sabbatical 1/2 Yr Full Pay	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	27-APR-2005
SIC Sick Pay	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	24-JUN-2004
SPA Supplemental Annualized	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	21-DEC-2005

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Select <b>Eligible Earnings</b> from the <b>Options</b> menu.
2	Enter a check mark in the <b>Attendance Indicator</b> check box if you want PHPMTIM to insert attendance records on PHAHOURL.
3	Enter a check mark in the <b>Time Sheet Print Sequence</b> check box if you want the earnings code to appear as an option for entry on the Web or PHATIME. The RP earning type must be assigned a sequence number in the <b>Time Sheet Print Sequence</b> field for pay period time sheet employees.
4	Enter a check mark in the <b>Approvers Indicator</b> check box to enable the approver to add earnings codes.
5	Click the <b>Save</b> icon.
6	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Installation Rule Form

◀ Jump to TOC

#### Purpose

The Installation Rule Form (PTRINST) contains 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.

The **Certification Required on the Web** checkbox if a Certification page is presented to an employee after he/she submits a time sheet or leave request for approval. If this page is presented, the employee must enter his/her PIN number to verify that he/she is a valid user. The default value for this checkbox is unchecked, which means that no Certification page is presented and the data is submitted to the system immediately after the Submit button is clicked.

#### Banner form

Installation Rules PTRINST 7.2 (s4b70)

<p><b>Payroll or Finance Rules</b></p> <p><input checked="" type="checkbox"/> <b>Display Amount or Rate at Time Rules</b></p> <p><input type="checkbox"/> <b>Generate Records for Non-Scheduled Work Days</b></p> <p>Payroll Interface Date: <input type="text" value="Check Date"/></p> <p><input checked="" type="checkbox"/> <b>Revoke Electronic W-2 Consent on Employee Termination</b></p> <p><b>FSA Grace Period</b></p> <p>Additional Months: <input type="text" value="2"/></p> <p>Additional Days: <input type="text"/></p> <p><b>Web Information</b></p> <p>Latest Year-End Statement to Display W-2 or T4: <input type="text" value="2006"/></p> <p><input checked="" type="checkbox"/> <b>Certification Required on the Web</b></p> <p><input checked="" type="checkbox"/> <b>Employee May Update Direct Deposit Records</b></p>	<p><b>Regulatory Rules</b></p> <p>Temporary I-9 Limit Days: <input type="text" value="21"/></p> <p><b>Tax Free Life Insurance:</b></p> <p>Employee: <input type="text" value="50,000.00"/></p> <p>Dependent: <input type="text" value="2,000.00"/></p> <p>SIN Validation: <input type="text" value="Error"/></p> <p><b>Security Level Activation Rules</b></p> <p><input checked="" type="checkbox"/> <b>Employer Security</b></p> <p><input checked="" type="checkbox"/> <b>Salary Security</b></p> <p><input checked="" type="checkbox"/> <b>Organization Security</b></p> <p><input checked="" type="checkbox"/> <b>Employee Class Security</b></p>
---	--

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Installation Rule Form (PTRINST).
2	Click the <b>Certification Required on the Web</b> check box if you want the employees to receive a certification page upon completion of their time to verify that the hours are accurate.
3	Click the <b>Save</b> icon.
4	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Employee Jobs Form

◀ Jump to TOC

#### Purpose

The payroll default window on the Employee Jobs Form (NBAJOBS) displays time entry defaults.

#### Banner form

Employee Jobs NBAJOBS 7.3 (s=70)

ID:  Last Paid Date:   
 Position:  Suffix:  Query Date: 31-MAY-2006

Base Job Job Detail Payroll Default Deferred Pay Miscellaneous Excluded Deductions/... Default Earnings Work Schedules Job Labor Distribution

Begin Date:  End Date:  Job Type: Primary

IPEDS Reporting Indicator

COA:  Accrue Leave  Civil Service

Increase MM and DD:  /   
 Eligible Date:   
 Deferred Balance: .00

Probationary Data  
 Probationary Period:   
 Probationary Begin Date:   
 Probationary End Date:

Encumbering Data  
 Salary Encumbrance:   
 Fringe Encumbrance:   
 Total Encumbrance Hours:

Contract Start:   
 Contract End:   
 Total Contract Hours:

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Employee Jobs Form (NBAJOBS).  <u>Note:</u> The only time you would use this form is to view the payroll method for a particular employee or to override the default method. For instance, everyone in Human Resources enters time via the PHATIME (department time entry) except one employee; he/she enters time via the web. You would come here to over ride the default Department Time Entry method.
2	Select the <b>Search</b> function in the <b>ID</b> field to find the ID number of the employee.
3	Select the <b>Search</b> function in the <b>Position</b> field to the position held by the employee.
4	Perform a <b>Next Block</b> function.



## Section B: Set Up

### Lesson: Employee Jobs Form (Continued)

◀ Jump to TOC

#### Payroll Default tab

Employee Jobs NBAJOBS 7.3 (s4b70)

ID: 100000DRC Amy Adams Last Paid Date:

Position: C10001 Suffix: 00 Query Date: 01-MAY-2006

Base Job Job Detail **Payroll Default** Deferred Pay Miscellaneous Excluded Deductions/... Default Earnings Work Schedules Job Labor Distribution

Effective Date: 01-MAY-2006

**Timesheet Defaults**

Timesheet COA: B

Timesheet Organization: 11001 Arts and Sciences

Payroll ID: MN Monthly

Default Shift: 1

Time Entry Method: Dept Time Entry with Approvals

Time Entry Type: Pay Period Time Sheet

Time In and Out

Leave Report Method: None (Payroll)

Leave Report Payroll ID: MN Monthly

**Premium Pay Methods**

Longevity:

Premium Pay:

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Select the <u>Job Detail</u> tab.
2	Select the <u>Payroll Default</u> tab.
3	Select a method from the pull-down list in the <b>Time Entry Method</b> field.
4	Select a type from the drop-down list in the <b>Time Entry Type</b> field.
5	Click the <b>Time In and Out</b> checkbox if you institution requires this.
6	Click the <b>Save</b> icon.
7	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Electronic Approval Category Code Validation

◀ Jump to TOC

#### Purpose

The Electronic Approval Category Code Validation Form (NTVACAT) is 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.

#### Banner form

Approval Category Code	Description	Self-Service Description	Self Service Display Sequence	Activity Date
P	adding Job			11-MAY-2006
ADDNEW	Address, New		451	07-MAR-2006
ADDRTL	Address and Telephone Number		501	01-MAR-2006
ADDUPD	Address, Update		2	30-NOV-2005
ADJOB	Adjunct Job Adjustment	Test for new Self Service Description	112	06-SEP-2005
ALL	All Fields	All Fields for every table that is supported by EPAFs on the	4	06-SEP-2005
ALLTYP	All fields by types of fields	All fields by approval types	3	09-SEP-2005

#### Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Electronic Approval Category Code Validation Form (NTVACAT).
2	Enter a Code in the <b>Approval Category Code</b> field.  <i>Example: TIME.</i>
3	Enter a brief description in the <b>Description</b> field.
4	Enter a brief description in the <b>Self Service Description</b> field.
5	Enter a sequence number in the <b>Self Service Display Sequence</b> field.
6	Click the <b>Save</b> icon.





## Section B: Set Up

### Lesson: Position Control Installation Form

◀ Jump to TOC

#### Purpose

The Position Control Installation Rule Form (NTRINST) is used to indicate whether an approver must return a time transaction to the employee who entered the time transaction on the Web.

#### Banner form

Position Control Installation Rules NTRINST 7.2 (s4b70)

Base Rules | Electronic Approval | Salary Planner

Location: United States

Insert Job Detail Data Between Existing Records:  Not Allowed  Allowed

Probationary Period Units:  Days  Month

Time Entry Rules

Time Entry Approval Category: TIME Time Entry

Leave Report Approval Category: LEAVE Leave Time Entry

Return Time or Leave Sheet to Employee on Web for Correction

Finance Rules

COA: B

Validate Position Budget: Warning

Maximum Document Sequence Number: 100

Create NHRDIST Records

Encumbrance Recasting Indicator

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Position Control Installation Rule Form (NTRINST).
2	Select an approval category from the drop-down list in the <b>Time Entry Approval Category</b> field.
3	Select a leave report approval category from the drop-down list in the <b>Leave Report Approval Category</b> field.
4	Click the <b>Return Time Sheets to Employee on Web for Correction</b> check box.
5	Click the <b>Save</b> icon.
6	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Routing Queue Rule Form

◀ Jump to TOC

#### Purpose

The Routing Queue Rule Form (NTRRQUE) 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.

On NTRRQUE, either you must enter values in the **COA** and **Organization** fields or you must enter a value in the **Position** field. No three fields can have values in them simultaneously. This tells the system that you want to select the approval queue based on chart of accounts and organization, or position.

#### Banner form

Approver Sequence	Mandatory Approver	Approver Position	Current Incumbent	Approver Action
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



## Section B: Set Up

### Lesson: Routing Queue Rule Form (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Routing Queue Rule Form (NTRRQUE).  <u>Note:</u> To create a routing queue using the <b>COA</b> and <b>Organization</b> fields go to <b>Step 2</b> . To create a routing queue using a position field go to <b>Step 6</b> .
2	Double-click the <b>Search</b> icon next to the <b>COA</b> field to access the Chart of Accounts Validation Form (FTVCOAS).  <u>Note:</u> For non-Finance installations, this field is not navigable.
3	Select the chart of accounts from which you want to create the routing queue.  <u>Note:</u> If the COA code is entered, then the organization code is required.
4	Double-click the <b>Search</b> icon next to the <b>Organization</b> field.
5	Select the organization from which you want to create the routing queue. Then go to <b>step 9</b> .  <u>Note:</u> For clients having the HR and Finance modules, select the organization from the Organization Code Validation Form (FTVORGN) list. For non-Finance clients, select the organization from the Organization Code Validation Form (PTVORGN). A routing queue established for a position takes precedence over a routing queue established for an organization when both exist for the same job.
6	Double-click the <b>Search</b> icon next to the <b>Position</b> field.
7	Select the position from which you want to create a routing queue—Position List Form (NBQPOSN).
8	Perform a <b>Next Block</b> function.
9	Click the <b>Save</b> icon.
10	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Override Routing Queue Form

◀ Jump to TOC

#### Purpose

The Override Routing Queue Form (NBAJQUE) allows the user to override routing queues established on the Routing Queue Rule Form (NTRRQUE).

This form should only be used if it is absolutely necessary to override a routing queue set up on NTRRQUE or if a few employees need a specific routing queue.

#### Banner form

Approver Sequence	Approver Position	Approver or Incumbent	Approver Action
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



## Section B: Set Up

### Lesson: Override Routing Queue Form (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Override Routing Queue Form (NBAJQUE).
2	In the <b>ID</b> and <b>Position</b> and <b>Suffix</b> fields, select the <b>Search</b> function and select the ID of the approver and his/her position.
3	Double-click in the <b>Approver Category</b> field and select the approval category for which you want to review the approval queue for the employee.
4	Enter the sequence number assigned to the approver in the routing queue in the <b>Approve Sequence</b> field.
5	Enter the position number and description of the approver's position in the <b>Approver Position</b> field.
6	Enter the name of the approver in the <b>Approver/Incumbent</b> field.
7	Enter the action required of the approver in the <b>Approver Action</b> field.
8	Click the <b>Save</b> icon.
9	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Position Definition Form

◀ Jump to TOC

#### Purpose

The Position Definition Form (NBAPOSN) is used to ensure that a routing queue reference has been defined.

#### Banner form

Position Definition NBAPOSN 7.2 (s4b70)

Position Number: C10001

---

Position Status: Active      Type: Single  
 Position Begin Date: 01-JUL-1993      Position End Date:      COA: B

---

**Compensation and Classification**

Position Class: CFP01 Clerk I      Appointment Percent: 100.00  
 Position Title: Clerk I      Budget Type: Permanent  
 Employee Class: 03 FT Clerical       Exempt Indicator  
 Job Progression: CLER Clerical       Accrue Seniority  
 Salary Group: 2005 Clerical      Range Low: 5.05  
 Salary Table: CL      Range Midpoint: 7.07  
 Salary Grade: 01      Range High: 9.09  
 Salary Step:      Step Value:        
 Reports To: A00001 President  
 Work Schedule:        
 Probationary Period:        
 Bargaining Unit:        
 Job Location:     

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Position Definition Form (NBAPOSN).
2	View the <b>Reports To</b> field.  <p><b>Note:</b> If the <b>Reports To</b> field on the Position Definition Form (NBAPOSN) contains a value, this is sufficient to use as a routing queue reference, and consequently, the NTRRQUE or NBAJQUE forms do not need to be completed. The only exception occurs if the approver position listed in the <b>Reports To</b> field on NBAPOSN contains multiple incumbents or the approver position is vacant. In these cases, it is required to set up a queue on NBAJQUE or NTRRQUE to approve time transactions.</p>



## Section B: Set Up

### Lesson: Electronic Approval Proxy Rule Form

◀ Jump to TOC

#### Purpose

The Time Entry Proxy Information window on the Electronic Approval Proxy Rule Form (NTRPROX) 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.

Once proxy privileges are established on the Time Entry Proxy Information window, the user identified as the Proxy ID can be entered in the **Proxy For** fields on the Electronic Approvals of Time Entry Form (PHATIME), the Department Approval Summary Form (PHADSUM), and/or Web/Department Employee Time Form (PHIETIM), or in order to enter or approve time transactions with the same privileges as the approver.

Note: A proxy has the same privileges as a particular approver only if the proxy has the same security setup as that approver.

Approvers can also set up proxy via the Web. The approvers can set up one or more proxies to approve time sheet in their absence by access the Proxy Set Up page. This Link is only available to those employees who are designated as approvers of Web Time Entry. *See Proxy Set-Up through the Web in Section C.*

#### Banner form

Electronic Approval Proxy Rules NTRPROX 7.2 (s4b70)

User ID:

---

**Default Level Description**

Level Code	Description	Approval Level
MGR	Manager	70
SUPER	Superuser	99
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

---

**Proxy**

Proxy ID	Name	Activity Date
ASMITH	Ms Angelica Rachel Smith	10-NOV-2004
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>



## Section B: Set Up

### Lesson: Electronic Approval Proxy Rule Form (Continued)

◀ Jump to TOC

#### Options – Time Entry Proxy

Time Entry Proxies NTRPROX 7.2 (s4b70)

User ID:

---

Time Entry Proxy

Proxy ID	Name
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

#### Procedure

Follow these steps to complete the form.

Step	Action
1	Access Electronic Approval Proxy Rule Form (NTRPROX).
2	Select <u>Time Entry Proxy</u> from the <b>Options</b> drop down menu.
3	Enter the user ID of the person establishing the proxy in <b>User ID</b> field.  <u>Note:</u> This ID is seen on the main window of NTRPROX.
4	Enter the Oracle ID of the person to whom proxy privileges are assigned in the <b>Proxy ID</b> field.  <u>Note:</u> Selections come from the Enterprise Access Control Form (GOAEACC). The proxy ID's name defaults when the selection is made.  <u>Result:</u> The <b>Name</b> of the person to whom proxy privileges are assigned is displayed. When you select the ID, the name defaults.





## Section B: Set Up

### Lesson: User Codes Rule Form

◀ Jump to TOC

#### Purpose

The User Codes Rule Form (PTRUSER) identifies security privileges in Banner. The Time Entry Approvals Superuser field, when checked, indicates Superuser status.

Superusers have the ability to override routing queues established as part of the Approvals process for time sheets and leave requests if such action is needed. For example, if an approver is sick and the time sheet requires approval, the Superuser has the ability to approve the time sheet so the payroll can be processed. No proxy need be established

#### Banner form

#### Procedures

Follow these steps to complete the process.

Step	Action
1	Access the User Codes Rule Form (PTRUSER).
2	Click the <b>Time Entry Approvals Superuser</b> checkbox.
3	Click the <b>Save</b> icon.
4	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Self Check

◀ Jump to TOC

#### **Directions**

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

#### **Question 1**

When time is entered and needs approval or a leave request has been submitted then the system generates a routing queue.

True or False

#### **Question 2**

Which form will allow the user's access to the Web?

- a) PTRPICT
- b) PTRCALN
- c) PTRECLS
- d) NBAJOBS
- e) All of the Above



## Section B: Set Up

### Lesson: Answer Key

◀ [Jump to TOC](#)

#### Question 1

When time is entered and needs approval or a leave request has been submitted then the system generates a routing queue. (True or False)

**True** or False

#### Question 2

Which forms will allow the user's access to the Web?

- a) PTRPICT
- b) PTRCALN
- c) PTRECLS
- d) NBAJOBS
- e) **All of the Above**



## Section C: Day-to-Day Operations

### Lesson: Overview

◀ [Jump to TOC](#)

#### **Introduction**

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

#### **Intended audience**

Human Resources Office Staff.

#### **Objectives**

At the end of this section, you will be able to

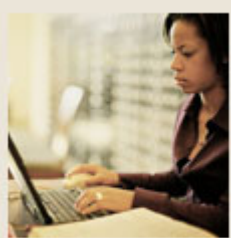
- describe the approval routing process
- enter time through the web
- request a leave through the web
- approve time through the web
- approve a request through the web
- set up proxy information through the web.

#### **Prerequisites**

To complete this section, you should have

- completed the Education Practices computer-based training (CBT) tutorial “Banner 7 Fundamentals,” or have equivalent experience navigating in the Banner System
- completed the Human Resources Overview workbook
- completed the Human Resources Time Entry/Payroll Processing workbook
- completed the Human Resources Electronic Approvals workbook.

You will also need to ensure that the rules and validation codes in Banner needed for time entry through the web have been set up for you.



## Section C: Day-to-Day Operations

### Lesson: Overview (Continued)

◀ [Jump to TOC](#)

#### Section contents

Overview .....	36
Process Introduction .....	38
Outline of Approval Routing Process .....	39
Entering Time Through the Web.....	41
Approving Time Using PHADSUM .....	47
Approving Time Through the Web .....	52
Pulling Information into Payroll.....	57
Web Leave Request: Enter or Approve.....	58
PROXY Set-Up through the Web .....	61
Self Check .....	63
Answer Key .....	65



## Section C: Day-to-Day Operations

### Lesson: Process Introduction

◀ Jump to TOC

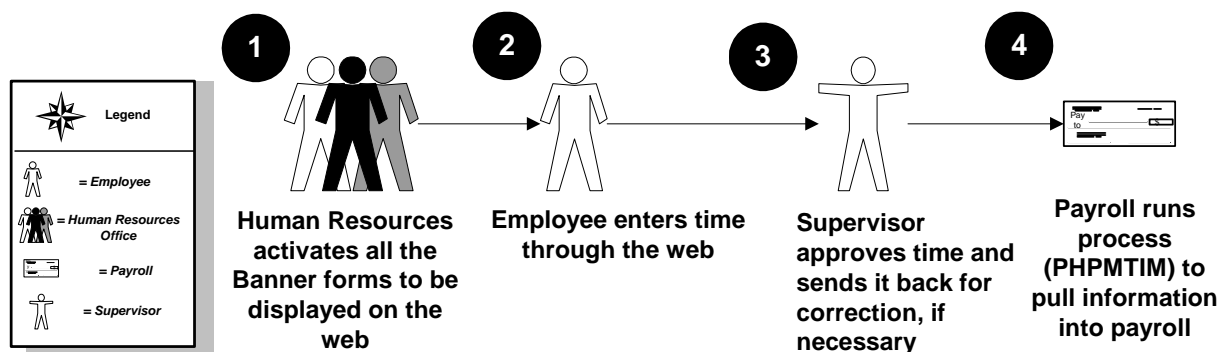
#### About the process

The Human Resource Office can:

- Activate all of the Banner forms to be displayed on the Web (See Section B – Set up)
- Run the Payroll process

#### Flow diagram

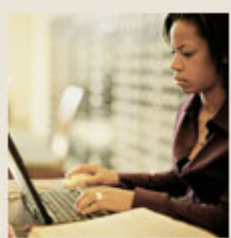
This diagram highlights the processes used to enter and approve time through the web.



#### What happens

The stages of the process are described in this table.

Stage	Description
<b>Human Resource Office</b>	
1	Human Resources activates 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 run process (PHPMTIM) to pull information into payroll.



## Section C: Day-to-Day Operations

### Lesson: Outline of Approval Routing Process

◀ Jump to TOC

#### 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.

Step	Action
1	Originator submits time for approval through the Web.
2	<p>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.</p> <p>System checks NBAJQUE for routing queue for the employee's position.</p> <ul style="list-style-type: none"><li>• If no values exist for the position on NBAJQUE, the system checks NTRRQUE for the employee's position.</li><li>• If no values exist for the position on NTRRQUE, the system checks NTRRQUE for an organization code set up.</li><li>• If no values exist on NTRRQUE for organization code, the system looks for a value in the <b>Reports To</b> field on NBAPOSN.</li><li>• If the <b>Reports To</b> field are not populated, the system displays an error message. A routing must be created before the entry can be submitted.</li></ul>
3	When an approver needs to approve transactions, he/she receives electronic notification during his/her sign on to Banner to access the Human Resources forms. The message <i>You have Electronic Approvals Transactions. Do you wish to view?</i> appears. You select <i>Time Sheets/Leave</i> to view time transactions which takes you to the Department Approval Summary Form (PHADSUM) to approve time sheets and leave requests.



## Section C: Day-to-Day Operations

### Lesson: Outline of Approval Routing Process (Continued)

◀ Jump to TOC

#### Approval process, continued

Step	Action
4	<p>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. Once the final approver takes action and approves the time transactions, the transaction status for all of the specified time sheets or leave requests on PHADSUM changes to <i>Approved</i>. When the system determines which approval queue is used, it prioritizes the existing approval queues in the following way.</p> <ul style="list-style-type: none"><li>• The Web uses the approval queue established on NBAJQUE.</li><li>• If no queue exists on NBAJQUE, then the Web uses the queue established with the employee's position on NTRRQUE.</li><li>• If no position queue exists on NTRRQUE, then the Web uses the queue established with the employee's time sheet organization code on NTRRQUE.</li><li>• If no organization queue exists on NTRRQUE, then the Web uses the <b>Reports To</b> field established for the employee's position on the Position Definition Form (NBAPOSN).</li><li>• 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).</li></ul> <p><u>Note:</u> Extract processes can only occur via the Web after the close of the pay period.</p> <ul style="list-style-type: none"><li>• Submit approved records to payroll.</li></ul>





## Section C: Day-to-Day Operations

### Lesson: Entering Time Through the Web

◀ Jump to TOC

#### Time reporting functions

Banner Web Time Entry enables employees to report their time on the Web and to submit the time transactions (time sheets or leave requests) directly from the Web to the Banner HR 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
- Click the **Account Distribution** button to allow labor distribution overrides (based on employee class)

Time In and Out functions:

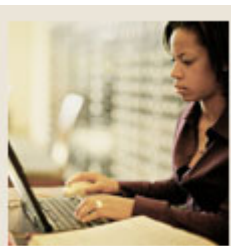
- Time must be entered in 15-minute increments
- Both Time In and Out must be entered
- The Next Day option **Saves** your record and takes you to the next day for entry
- The Add New Line option adds another entry line to the page
- The Delete option removes the entry from the day
- The Previous Menu 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 leave report/time sheet when the leave/time entry period is open or closed. If the entry period has not yet opened, then no one can extract a leave report/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.



## Section C: Day-to-Day Operations

### Lesson: Entering Time Through the Web (Continued)

◀ Jump to TOC

#### Screen image

Please enter your User Identification Number (ID) and your Personal Identification Number (PIN). When finished, select Login.

Please Note: ID is Case Sensitive

To protect your privacy, please Exit and close your browser when you are finished.

User ID:

PIN:

RELEASE: 7.3

powered by  
**SUNGARD** HIGHER EDUCATION

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access Internet Explorer or Netscape and enter the URL as provided by your instructor.
2	Access the <u>Enter Secure Area</u> option.
3	Enter the User ID in the <b>User ID</b> field.
4	Enter the PIN in the <b>PIN</b> field.
5	Click the <b>Login</b> button.
6	From the Main Menu, select <u>Employee</u> .
7	From the Employee Services page, select <u>Time Sheet</u> .
8	Select the radio button next to <b>Access my Time Sheet</b> .
9	Click on the <b>Select</b> button.
10	Select the radio button next to the position on which you want to enter time.  <u>Note:</u> You can only select one position at a time. If you have multiple positions, enter time in one position, then return to this page to select the next position.



## Section C: Day-to-Day Operations

### Lesson: Entering Time Through the Web (Continued)

◀ Jump to TOC

#### Screen image

Personal Information **Employee**

Search   [SITE MAP](#) [HELP](#) [EXIT](#)

### Time and Leave Reporting

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: Administrator -- A00001-00  
 Department and Number: Arts and Sciences -- 11001  
 Time Sheet Period: 05/01/06 to 05/31/06  
 Submit By Date: 06/03/06 by 05:00 P.M.

Earning	Shift	Default Hours or Units	Total Hours	Total Units	Monday 05/01/06	Tuesday 05/02/06	Wednesday 05/03/06	Thursday 05/04/06	Friday 05/05/06	Saturday 05/06/06	Sunday 05/07/06
Regular Pay	1	173.33	0	0	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>
Holiday Pay	1	0	0	0	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>
Vacation Pay	1	0	0	0	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>
Sick Pay	1	0	0	0	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>
Barbara's Test	1	0	0	0	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>
<b>Total Hours:</b>			0	0	0	0	0	0	0	0	0
<b>Total Units:</b>				0	0	0	0	0	0	0	0

Position Selection | Comments | Preview | Submit for Approval | Restart | Next

#### Procedure, continued

Step	Action
11	<p>Click on the <b>Time Sheet</b> button.</p> <ul style="list-style-type: none"> <li>The Time Sheet page displays. All days of the pay period are displayed regardless of the time entry period defined on PTRECLS. If the time period extends beyond the display area, click on the Next button to display information for the future days.</li> <li>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.</li> <li>If the record is set up as Exception Time Entry, all earnings codes with a time sheet sequence code on PTRECLS and with the <b>Reduce Base Pay</b> field populated on PTREARN are listed.</li> </ul>
12	To begin, click an <b>Enter Hours</b> link under the date where you want to enter time. Click <b>Next/Previous</b> button for more dates within the period.
13	Enter the hour's value in the <b>Hours</b> field.
14	Click the <b>Save</b> button.



## Section C: Day-to-Day Operations

### Lesson: Entering Time Through the Web (Continued)

◀ Jump to TOC

#### Screen image

The screenshot shows the SunGard Higher Education web interface. At the top, there is a header with the SunGard logo and 'HIGHER EDUCATION'. Below this, there are tabs for 'Personal Information' and 'Employee'. A search bar is present with a 'Go' button. On the right, there are links for 'SITE MAP', 'HELP', and 'EXIT'. The main content area is titled 'Time and Leave Reporting'. Below the title, there is an information icon and a message: 'Select the link under a date to enter hours or days. Select Next or Previous to navigate through the dates within the period.' A note follows: '\*\* Account Distribution adjusted on this day.' The 'Time Sheet' section displays the following information: Title and Number: Administrator -- A00001-00; Department and Number: Arts and Sciences -- 11001; Time Sheet Period: 05/01/06 to 05/31/06; Submit By Date: 06/03/06 by 05:00 P.M.; Earning: Regular Pay; Date: 05/01/06; Shift: 1; Hours: 184. At the bottom of the form, there are buttons for 'Save', 'Copy', and 'Account Distribution'.

#### Procedure, continued

Step	Action
15	To copy hours to other days or to the end of the pay period, click the <b>Copy</b> button.  <b>Note:</b> If you want to copy weekend dates, be sure to check <b>Include Saturday(s)</b> or <b>Include Sunday(s)</b> . To copy individual dates, click the check boxes under the dates.  If you select the same date that you are copying from, your hours will be deleted.
16	Click the <b>Time Sheet</b> button at the bottom of the page to return to the Time Sheet page and review your hours entered.
17	Click the <b>Comments</b> button to enter your comments in the text box.  <b>Note:</b> As an option, you can enter Comments. Comments entered on the Web can be viewed on PHATIME and PHADSUM.
18	Click the <b>Save</b> button.
19	Click the <b>Previous Menu</b> button to return to the Time Sheet page.



## Section C: Day-to-Day Operations

### Lesson: Entering Time Through the Web (Continued)

◀ Jump to TOC

#### Screen image

Personal Information **Employee**

Search   [SITE MAP](#) [HELP](#) [EXIT](#)

### Time and Leave Reporting

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:** Administrator -- A00001-00  
**Department and Number:** Arts and Sciences -- 11001  
**Time Sheet Period:** 05/01/06 to 05/31/06  
**Submit By Date:** 06/03/06 by 05:00 P.M.

**Earning:** Barbara's Test  
**Date:** 05/01/06  
**Shift:** 1  
**Hours:**

Earning	Shift	Default Hours or Units	Total Hours	Total Units	Monday 05/01/06	Tuesday 05/02/06	Wednesday 05/03/06	Thursday 05/04/06	Friday 05/05/06	Saturday 05/06/06	Sunday 05/07/06
Regular Pay	1	173.33	8		8	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>
Holiday Pay	1	0	0		0	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>
Vacation Pay	1	0	0		0	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>	<a href="#">Enter Hours</a>

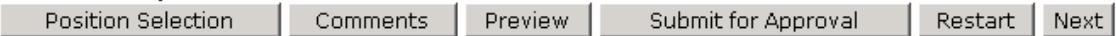


## Section C: Day-to-Day Operations

### Lesson: Entering Time Through the Web (Continued)

◀ Jump to TOC

#### Procedure, continued

Step	Action
20	<p>Click the <b>Preview</b> button to access the Preview page to review your time entered.</p> <p><u>Note:</u> 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.</p>
21	<p>Select the <b>Restart</b> button to remove all entry done on that day.</p>
22	<p>Click on the <b>Submit</b> button to submit the time for approval.</p> <p><u>Note:</u> You can <b>Exit</b> without submitting time for approval. This leaves the record in an “In Progress” status and is not submitted for time. No updates can be done to the pay period once the record has been submitted.</p> <p></p>
23	<p>If the time sheet must be certified, enter your PIN and click <b>OK</b> on the Certification page.</p>
24	<p>If you have additional positions or pay periods on which to enter time, click on the <b>Position Selection</b> button.</p>
25	<p>Click the <b>Exit</b> button when you have all time entered.</p>
26	<p>The status for the record is set to <i>Pending</i> when the employee exits the Time Entry page and places the data into the approval queues.</p>



## Section C: Day-to-Day Operations

### Lesson: Approving Time Using PHADSUM

◀ Jump to TOC

#### Introduction

The Department Approval Summary Form (PHADSUM) 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. The sort order for the queue status is:

- Pending
- In the queue
- Acknowledged
- Approved
- Auto approved
- Overridden

For a transaction to be approved, it must be in “pending” status. The record remains in pending until all approvers in the queue have approved the time transactions. The status moves to “approved” when all approvers have approved the transaction.

A user defined as part of a routing queue receives an alert message indicating that Electronic Approvals transactions exist for his/her approval. Selecting Time Sheets/Leave takes the approver to the PHADSUM form.



## Section C: Day-to-Day Operations

### Lesson: Approving Time Using PHADSUM (Continued)

◀ Jump to TOC

#### Banner form

Department Payroll Summary PHADSUM 7.1.5.1 (s4b70)

User ID:  Proxy For:   Superuser

Approval of:

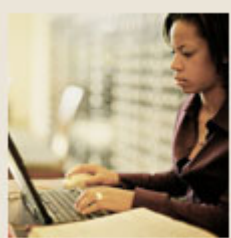
COA:  Organization:   Transaction Status:

Year:  Payroll ID:  Payroll No:

ID	Position	Queue Status	Required Action	Approve or Acknowledge	Return for Correction	Comments Exist	Errors Exist
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Earnings	Shift	Special Rate	Hours	Units	Labor Override Exists
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Total:			<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	





## Section C: Day-to-Day Operations

### Lesson: Approving Time Using PHADSUM (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Department Approval Summary Form (PHADSUM).
2	Select the <b>Search</b> function in the <b>Organization</b> field and select the organization code.
3	The <b>Transaction Status</b> field defaults to <i>pending</i> .
4	Select the <b>Search</b> function in the <b>Payroll ID</b> field and select the pay ID code.
5	Select the <b>Search</b> function in the <b>Payroll No</b> field and select the pay number.
6	Perform a <b>Next Block</b> function.  <u>Note:</u> Use the vertical scroll bar to view more records.
7	For each record, click the <b>Approve or Acknowledge</b> checkbox to indicate the approval/acknowledgement of the time.
8	If a record is incorrect, click the <b>Return for Correction</b> checkbox.  <u>Note:</u> This returns the record to the originator for correction and re-submission.
9	Click the <b>Save</b> icon.
10	Click the <b>Exit</b> icon.

#### Options list

- View/Change Time Detail – Accesses the PHATIME form. The approver can make changes here.
- Approve/Acknowledge All – Populates all of the **Approve or Acknowledge** indicators.
- Apply All Actions – Approver can mark each record as approved, or use this to mark all records at once.
- View/Enter Comments – If comment is marked as confidential, then an employee is not able to see the approver's comment on the Web.
- View/Change Routing Queue – Ability to change routing queue. Mandatory approvers defined on NTRRQUE cannot be changed or deleted.
- View Errors/Warnings – Goes to Pay History Display Errors Form (PHIDERR).
- Transaction Summary – Used by timekeepers to track totals for the timesheets.



## Section C: Day-to-Day Operations

### Lesson: Approving Time Using PHADSUM (Continued)

◀ Jump to TOC

#### Approve as a superuser

You are an approver acting as a Superuser and you want to approve all of the pending time sheets for a payroll except for a few of them. Follow the steps to complete the process.

Step	Action
1	Access the Department Approval Summary Form (PHADSUM).
2	Click the <b>Superuser</b> checkbox.
3	Select <i>Time Sheets</i> from the drop-down list in the <b>Approval of</b> field.
4	Select <i>Pending</i> from the drop-down list in the <b>Transactions Status</b> field.
5	Select the <b>Search</b> function in the <b>Payroll ID</b> field and select the Pay ID for the transaction you want to approve.
6	Select the <b>Search</b> function in the <b>Payroll No</b> field and select the Pay No for the transaction you want to approve.
7	Perform a <b>Next Block</b> function.
8	Select <u>Approve/Acknowledge All</u> from the <b>Options</b> menu.
9	Review the list and uncheck several items that should not be approved.
10	Select <u>Apply All Actions</u> from the <b>Options</b> menu.
11	Click the <b>Save</b> icon.
12	Click the <b>Exit</b> icon.



## Section C: Day-to-Day Operations

### Lesson: Approving Time Using PHADSUM (Continued)

◀ Jump to TOC

#### Return a time sheet

Follow the steps to complete the process.

Step	Action
1	Access the Department Approval Summary Form (PHADSUM).
2	Select <i>Time Sheets</i> from the drop-down list in the <b>Approval of</b> field.
3	Select <i>Pending</i> from the drop-down list in the <b>Transactions Status</b> field.
4	Select the <b>Search</b> function in the <b>Payroll ID</b> field and select the Pay ID for the transaction you want to approve.
5	Select the <b>Search</b> function in the <b>Payroll No</b> field and select the Pay No for the transaction you want to approve.
6	Perform a <b>Next Block</b> function.
7	Select any employee whose time sheet needs to be changed because of an error.
8	Click the <b>Return for Correction</b> checkbox.
9	Click the <b>Save</b> icon.
10	Click the <b>Exit</b> icon. <u>Note:</u> An approver can make the correction also. Select the <u>View/Change Time Detail</u> option from the <b>Options</b> menu to access the Electronic Approvals of Time Entry Form (PHATIME).



## Section C: Day-to-Day Operations

### Lesson: Approving Time Through the Web

◀ Jump to TOC

#### Introduction

Managers can approve employees' time sheets and leave requests from the Web in much the same manner as the approve time through Banner (PHADSUM).

The Web Time Approval pages are listed below:

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

#### Screen image

**SUNGARD HIGHER EDUCATION**

Personal Information **Employee**

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

## Employee

---

- [Time Sheet](#)
- [Leave Report](#)
- [Request Time Off](#)
- [Benefits and Deductions](#)  
Retirement, health, flexible spending, miscellaneous, beneficiary, open enrollment, Benefit Statement.
- [Pay Information](#)  
Direct deposit allocation, earnings and deductions history, or pay stubs.
- [Tax Forms](#)  
W4 information, W2 Form or T4 Form.
- [Jobs Summary](#)
- [Leave Balances](#)
- [Campus Directory](#)

RELEASE: 7.1 powered by  
**SUNGARD HIGHER EDUCATION**



## Section C: Day-to-Day Operations

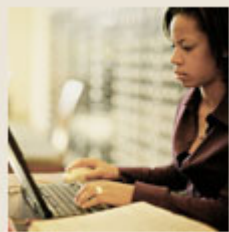
### Lesson: Approving Time Through the Web (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access Internet Explorer or Netscape and enter the URL as provided by your instructor.
2	Access the <u>Enter Secure Area</u> option.
3	Enter the User ID in the <b>User ID</b> field.
4	Enter the PIN in the <b>PIN</b> field.
5	Click the <b>Login</b> button.
6	From the Main Menu, select <u>Employee</u> .



## Section C: Day-to-Day Operations

### Lesson: Approving Time Through the Web (Continued)

◀ Jump to TOC

#### Screen image

**SUNGARD HIGHER EDUCATION**

Personal Information Student and Financial Aid **Employee** WebTailor Administration

Search   [SITE MAP](#) [HELP](#) [EXIT](#)

#### Approver Selection

Select the department from My Choice and choose the pay ID and period from the pull-down list. Determine the sort order and choose Select to access the records.

#### Time Sheet

Department and Description	My Choice	Pay Period
B, 11001, Arts and Sciences	<input checked="" type="radio"/>	MN, 06/01/06 to 06/30/06
B, 11007, Department of Mathematics	<input type="radio"/>	MN, 06/01/05 to 06/30/05

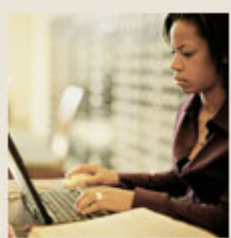
#### Leave Request

Department and Description	My Choice	Pay Period
B, 11001, Arts and Sciences	<input type="radio"/>	MN, 10/01/05 to 10/31/05

Sort Order

#### Procedure, continued

Step	Action
7	From the <a href="#">Employee Services page</a> , select <a href="#">Time Sheet</a> .
8	From the Time Sheet page, select the radio button for <b>Approve/Acknowledge Time Sheets or Leave Request</b> .
9	Click the <b>Select</b> button.
10	To approve time sheets for a department, select the <b>Department and Description</b> radio button next to that department.
11	Select a pay period from the drop-down list in the <b>Pay Period</b> field.
12	To determine the sort order, select the appropriate radio button.
13	Click the <b>Select</b> button.
14	On the Department Summary page, click the <b>Approve, or FYI</b> checkbox next to the employee(s)' time you want to approve. Select an employee's name to access additional details.
15	Click the <b>Select All, Approve, or FYI</b> button.
16	Scroll to the bottom of the screen and click the <b>Save</b> button to approve the time sheet(s).
17	<b>Exit</b> the Web.



## Section C: Day-to-Day Operations

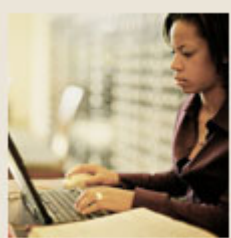
### Lesson: Approving Time Through the Web (Continued)

◀ Jump to TOC

#### Approve time as a superuser

Follow the steps to complete the process.

Step	Action
1	Access Internet Explorer or Netscape and enter the URL provided by your instructor.
2	Access the <u>Enter Secure Area</u> option.
3	Enter the user ID provided by your instructor in the <b>User ID</b> field.
4	Enter the PIN provided by your instructor in the <b>PIN</b> field.
5	Click the <b>Login</b> button.
6	From the Main Menu, select <u>Employee</u> .
7	From the Employee page, select <u>Time Sheet</u> .
8	From the Time Sheet page, select the radio button for <b>Approve/Acknowledge Time Sheets or Leave Request</b> .
9	Click the <b>Act as Superuser</b> check box.
10	Click <b>Select</b> .
11	Choose the appropriate combination of selection criteria and a sort order.
12	Click <b>Select</b> .
13	View transactions.
14	Approve/Acknowledge as appropriate.
15	<b>Exit</b> the Web.



## Section C: Day-to-Day Operations

### Lesson: Approving Time Through the Web (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to process an incorrect time sheet.

Step	Action
1	Access Internet Explorer or Netscape and enter the URL provided by your instructor.
2	Access the <u>Enter Secure Area</u> option.
3	Enter the user ID provided by your instructor in the <b>User ID</b> field.
4	Enter the PIN provided by your instructor in the <b>PIN</b> field.
5	Click the <b>Login</b> button.
6	From the Main Menu, select <u>Employee</u> .
7	From the Employee page, select <u>Time Sheet</u> .
8	From the Time Sheet page, select the radio button for <b>Approve/Acknowledge Time Sheets or Leave Request</b> .
9	Click on an employee name to view the details of their time sheet.
10	<u>Employee fix time sheet:</u> If their time is entered incorrectly, click the <b>Return for Correction</b> button.
11	<u>Approver fix time sheet:</u> Select the <b>Change</b> button to change time detail.
12	Make appropriate changes.
13	Select the <b>Submit</b> button.
14	<b>Exit</b> the Web.





## Section C: Day-to-Day Operations

### Lesson: Pulling Information into Payroll

◀ Jump to TOC

#### Introduction

After time has been entered and approved on the Web, run PHPTIME to pull payroll information into Banner HR.

#### Banner form

Process Submission Controls GJAPCTL 7.3 (s4b70)

Process: PHPTIME Time Processing Report Parameter Set:

---

**Printer Control**

Printer: Special Print: Lines: 55 Submit Time:

---

**Parameter Values**

Number	Parameters	Values
01	Payroll Year	2005
02	Payroll ID	UM
03	Payroll Number	1
04	Extract Indicator	I
05	Id Entry Choice Indicator	n
06	Id	
07	Supplemental/Regular Payroll	R
08	Use Population Selection	n

LENGTH: 1 TYPE: Character O/R: Optional M/S: Single  
Enter (Y)es, Use Population Selection or (N)o Dont Use it.

---

**Submission**

Save Parameter Set as Name: Description:  Hold  Submit

#### Web Entry

A summary of the process for Web is:

Step	Action
1	Enter time on the Web or on PHATIME.
2	Approve time on PHADSUM or the Web.
3	Run PHPTIME to populate PHAHOUR.
4	Run PHPMTIM to move the time into the Mass Time table and the Pay History tables. This populates PHAHOUR and PHAMTIM with the approved values from PHATIME or PHADSUM.
5	Continue with normal payroll process.



## Section C: Day-to-Day Operations

### Lesson: Web Leave Request: Enter or Approve

◀ Jump to TOC

#### Introduction

Through the Web, you can enter or view requested leave time for a pay period.

#### Screen image

**SUNGARD HIGHER EDUCATION**

Personal Information Student and Financial Aid **Employee** WebTailor Administration

Search  Go [SITE MAP](#) [HELP](#) [EXIT](#)

### Time Reporting Selection

*i* Select a name from the pull-down list to act as a proxy or select the check box to act as a Superuser

**Selection Criteria**

**My Choice**

Access my Time Sheet:

Access my Leave Report:

Access my Leave Request:

Approve or Acknowledge Time:

Act as Proxy:

Act as Superuser:

Select

[Proxy Set Up](#)

#### Procedures

Follow these steps to complete the process.

Step	Action
1	Access Internet Explorer or Netscape and enter the URL provided by your instructor.
2	Access the <u>Enter Secure Area</u> option.
3	Enter the user ID in the <b>User ID</b> field.
4	Enter the PIN in the <b>PIN</b> field.
5	Click the <b>Login</b> button.
6	From the Main Menu, select <u>Employee</u> .
7	From the Employee page, select <u>Request Time Off</u> .
8	From the Time Sheet or Leave Request Selection page, select the radio button for <b>Access my Leave Request</b> or <b>Approve or Acknowledge Time</b> .
9	Click the <b>Select</b> button.



## Section C: Day-to-Day Operations

### Lesson: Web Leave Request: Enter or Approve (Continued)

◀ Jump to TOC

#### Screen image

**SUNGARD HIGHER EDUCATION**

Personal Information Student and Financial Aid **Employee** WebTailor Administration

Search  Go [SITE MAP](#) [HELP](#) [EXIT](#)

### Time Reporting Selection

---

#### Selection Criteria

My Choice

Access my Time Sheet:

Access my Leave Report:

Access my Leave Request:

Approve or Acknowledge Time:

Act as Proxy:

Act as Superuser:

[Proxy Set Up](#)

#### Procedure

Follow these steps to enter a leave request.

Step	Action
1	On the Leave Request Selection page, make a selection from <b>My Choice</b> , choose a <b>Leave Request</b> period from the drop-down list, and click the <b>Leave Request</b> button.
2	Select the link under a date to enter hours. Select <b>Next</b> or <b>Previous</b> to navigate through the dates within the period.
3	Submit your request.



## Section C: Day-to-Day Operations

### Lesson: Web Leave Request: Enter or Approve (Continued)

◀ Jump to TOC

#### Screen image

**SUNGARD HIGHER EDUCATION**

Personal Information | Student and Financial Aid | **Employee** | WebTailor Administration

Search   [SITE MAP](#) [HELP](#) [EXIT](#)

### Time and Leave Reporting

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

**Leave Request**

Title and Number: Clerk I -- C10001-00  
 Department and Number: Department of Mathematics -- 11007  
 Leave Request Period: 10/01/06 to 10/31/06  
 Submit By Date: 09/30/06 by 05:00 P.M.

Earning	Shift	Default Hours or Units	Total Hours	Total Units	Sunday 10/01/06	Monday 10/02/06	Tuesday 10/03/06	Wednesday 10/04/06	Thursday 10/05/06	Friday 10/06/06	Saturday 10/07/06
Sick Pay	1		0	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Vacation Pay	1		0	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
<b>Total Hours:</b>			0		0	0	0	0	0	0	0
<b>Total Units:</b>				0	0	0	0	0	0	0	0

Position Selection | Comments | Preview | Submit for Approval | Restart | Next

#### Procedure

Follow these steps to Approve a leave request.

Step	Action
1	Select a pay period from the drop-down list in the <b>Pay Period</b> field.
2	To determine the sort order, select the appropriate radio button.
3	Click the <b>Select</b> button.
4	Select the employee's name to access additional details.
5	<b>Approve</b> their time.
6	<b>Exit</b> the Web.



## Section C: Day-to-Day Operations

### Lesson: PROXY Set-Up through the Web

◀ Jump to TOC

#### Introduction

The Proxy Set Up page is the web-equivalent of the Time Entry Proxy Information window of the Electronic Approval Proxy Rule Form (NTRPROX). 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

The screenshot displays the SunGard Higher Education web application. The header includes the SunGard logo and navigation tabs for Personal Information, Student and Financial Aid, Employee, and WebTailor Administration. A search bar is present with a 'Go' button. On the right, there are links for RETURN TO MENU, SITE MAP, HELP, and EXIT. The main content area is titled 'Proxy Set Up' and features a table with one row. The table has columns for 'Name' and 'Add Remove'. The 'Name' column contains 'Cindy Adams, SYSTEST01' and the 'Add Remove' column contains a checkbox. Below the table is a 'Save' button and a link for 'Time Reporting Selection'.

Name	Add Remove
Cindy Adams, SYSTEST01	<input type="checkbox"/>

Save

[Time Reporting Selection](#)



## Section C: Day-to-Day Operations

### Lesson: PROXY Set-Up through the Web (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to add a proxy.

Step	Action
1	Access the Time Reporting Selection window.
2	Click the <b>Proxy Set Up</b> link at the bottom of the window.
3	Choose a name from the <b>Name</b> selection list.  <u>Note:</u> This list is comprised from those Oracle IDs entered on the Enterprise Access Control Form (GOAEACC).
4	Select the <b>Add</b> indicator.
5	Click the <b>Save</b> button.
6	The name is then alphabetically displayed under the <b>Name</b> column.  <u>Note:</u> To <i>remove</i> a proxy, select the <b>Remove</b> indicator corresponding to a displayed proxy and then select the <b>Save</b> button

#### Updates

Updates made on the Web will be accessible on the Electronic Approval Proxy Rule Form (NTRPROX).



## Section C: Day-to-Day Operations

### Lesson: Self Check

◀ [Jump to TOC](#)

#### **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. For managers approving, they can use PHADSUM to view time.

True or False



## Section C: Day-to-Day Operations

### Lesson: Self Check (Continued)

◀ [Jump to TOC](#)

#### Question 5

How can an approver on the Web adjust the routing queue?

- a) The Department Approval Summary Form (PHADSUM).
- b) The Position Definition Form (NBAPOSN).
- c) The Override Routing Queue Form (NBAJQUE)
- d) The Payroll Identification Rule Form (PTRPICT)
- e) All of the Above

#### Question 6

You cannot enter comments on the Web.

True or False

#### Question 7

An employee can see the comments on the Web.

True or False





## Section C: Day-to-Day Operations

### Lesson: Answer Key

◀ [Jump to TOC](#)

#### Question 1

There is no way to fix your sheet if you entered your hours incorrectly. (True or False)

**True or 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.

#### Question 2

Changes to your record can be made after you submit it. (True or False)

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

#### Question 3

The entry of Comments is required.

**True or False.** It is an optional feature. 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. For managers approving, they can use PHADSUM to view time. (True or False)

**True or False**



## Section C: Day-to-Day Operations

### Lesson: Answer Key (Continued)

◀ Jump to TOC

#### Question 5

How can an approver on the Web adjust the routing queue?

- a) The Department Approval Summary Form (PHADSUM).
- b) The Position Definition Form (NBAPOSN).
- c) **The Override Routing Queue Form (NBAJQUE)**
- d) The Payroll Identification Rule Form (PTRPICT)
- e) All of the Above

#### Question 6

You cannot enter comments on the Web. (True or False)

**False. Comments can be viewed under the comments link on the timesheet page or leave requested page.**

#### Question 7

An employee can see the comments on the Web. (True or False)

**True**



## Section D: Reference

### Lesson: Overview

◀ [Jump to TOC](#)

#### **Introduction**

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

#### **Section contents**

Overview .....	67
Setup Forms and Where Used .....	68
Day-to-Day Forms and Setup Needed.....	69
Forms Job Aid .....	70



## Section D: Reference

### Lesson: Setup Forms and Where Used

◀ Jump to TOC

#### Guide

Use this table as a guide to the setup forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Payroll Identification Rule Form	PTRPICT	Department Approval Summary Form	PHADSUM
Payroll Calendar Rule Form	PTRCALN		
Shift Premium Rule Form	PTRSHFT		
Employee Class Rule Form	PTRECLS		
Installation Rule Form	PTRINST		
Employee Jobs Form	NBAJOBS		
Approvals Category Code Validation Form	NTVACAT		
Position Control Installation Rule Form	NTRINST		
Routing Queue Rule Form	NTRRQUE		
Override Routing Queue Form	NBAJQUE		
Position Definition Form	NBAPOSN		
Electronic Approval Proxy Rule Form	NTRPROX		
User Codes Rule Form	PTRUSER		



## Section D: Reference

### Lesson: Day-to-Day Forms and Setup Needed

◀ Jump to TOC

#### Guide

Use this table as a guide to the day-to-day forms and the setup forms needed for each.

<b>Day-to-Day Form</b>	<b>Setup Forms Needed</b>
Department Approval Summary Form (PHADSUM)	<ul style="list-style-type: none"><li>• Payroll Identification Rule Form PTRPICT</li><li>• Payroll Calendar Rule Form PTRCALN</li><li>• Shift Premium Rule Form PTRSHFT</li><li>• Employee Class Rule Form PTRECLS</li><li>• Installation Rule Form PTRINST</li><li>• Employee Jobs Form NBAJOBS</li><li>• Approvals Category Code Validation Form NTVACAT</li><li>• Position Control Installation Rule Form NTRINST</li><li>• Routing Queue Rule Form NTRRQUE</li><li>• Override Routing Queue Form NBAJQUE</li><li>• Position Definition Form NBAPOSN</li><li>• Electronic Approval Proxy Rule Form NTRPROX</li><li>• User Codes Rule Form PTRUSER</li></ul>



## Section D: Reference

### Lesson: Forms Job Aid

◀ Jump to TOC

#### Guide

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
PHADSUM	Department Approval Summary Form	
PTRPICT	Payroll Identification Rule Form	
PTRCALN	Payroll Calendar Rule Form	
PTRSHFT	Shift Premium Rule Form	
PTRECLS	Employee Class Rule Form	
PTRINST	Installation Rule Form	
NBAJOBS	Employee Jobs Form	
NTVACAT	Approvals Category Code Validation Form	
NTRINST	Position Control Installation Rule Form	
NTRRQUE	Routing Queue Rule Form	
NBAJQUE	Override Routing Queue Form	
NBAPOSN	Position Definition Form	
NTRPROX	Electronic Approval Proxy Rule Form	
PTRUSER	User Codes Rule Form	



## Release Date

◀ [Jump to TOC](#)

This workbook was last updated on 5/31/2006.