

LEAVE TIMEKEEPER USER GUIDE



Department of Human Resources
Banner 9

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Leave Overview

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

- 1) Employees submit their leave forms and these are tracked by their department in an electronic format or using paper timesheets/timecards.
- 2) Managers/Supervisors review and, if accurate, sign employee leave sheets and submit to the Department Originator for entry into Banner.
- 3) In Banner HR, the Department Originator extracts the leave time sheets for employees and keys their leave (PHATIME form). This can be started on Friday of a pay week (last day of pay period). Time should be entered for the corresponding pay period ending in this week.
- 4) Designated Departmental approvers review and approve leave in Banner HR (PHADSUM form).
- 5) Once approved, leave balances are instantly updated in Banner and can be viewed by employees using Banner Self Service.

Some important things to note:

- Leave time entry happens on a biweekly basis. The leave time entry/approval period is from the last day in a pay period to the following Thursday. Leave is always entered for the most recently past pay period. For example, if employees are paid on June 13th, this is for the period from June 1st to June 14th. Leave for this period should be both entered and approved in the period from June 14th to June 20th.
- Approvers are responsible for approving all submitted leave. Once they have approved leave in Banner, the employees leave balances will be immediately updated.
- It is important for Departments to submit and approve leave within the designated time entry period. If leave is not entered in a timely manner, employees will not be able to rely on their posted balances on Banner Self Service. Further, if time is submitted late, it is possible that the actual dates for leave will not be accurately displayed in the HR system. In such cases, departments will be responsible for communicating actual leave history to their employees.

Key Banner Forms

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

- **Electronic Approvals of Time Entry form (PHATIME)** - primary form used for leave entry by originators (users that key leave). Can also be used by approvers for approving leave.
- **Department Employee Time Inquiry form (PHIETIM)** – Similar to PHATIME form but it is used for inquiry purposes only (no leave records can be updated on this form).
- **Department Payroll Summary form (PHADSUM)** – primary form used by approvers for mass approving leave submissions. Approvers can also return leave to originators for correction from this form.
- **Employee Leave Balances form (PEALEAV)** – Lists employee leave details for all leave types.
- **Employee Attendance Inquiry form (PEIATND)** – Lists employee leave details broken down by leave type and day. Form can also be filtered to show a specific type of employee leave for a specific period of time.
- **Electronic Approval Proxy Rules form (NTRPROX)** - This form is where both originators and approvers can designate proxies for their Leave tasks. Proxies are users that have been granted permissions to act on behalf of originators or approvers (who designated them) when they are unavailable to key/approve leave.

Extracting Leave

The first step before entering leave in Banner is to set up your proxy. If you are the main timekeeper for your department, you should have at least one other person who can be set up as your proxy. If you are unsure of who the proxy should be, contact your leave administrator.

Setting up a proxy is a very important step and should be a one-time set up unless your proxy changes.

To set up your proxy, follow the below steps:

- In the Welcome box, type NTRPROX
- Your User ID will be displayed, click the Go button
- Click on the “Other Modules” tab
- In the “Proxy ID” type in your proxy’s user ID
- Click the “Save” button bottom right hand corner
- In the “Proxy Modules” block, in the Modules box, type in TIME (Note: the modules description will be Time Entry this is correct, even though it’s for leave entry)

After you have set up your proxy, you will have to extract leave records from a timesheet for each employee that has reported leave. By extracting a timesheet, you are initiating the leave entry process for the employee(s) that you have selected in the extraction process.

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

There are two ways to extract timesheets in Banner:

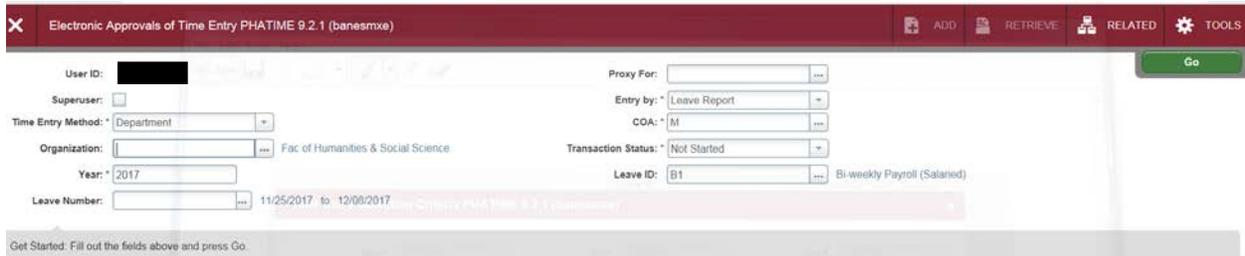
- You can extract all timesheets in an organization at once. This is the easiest way to extract time for a group, as you are only required to do this one time in a leave period for each organization that you are entering time.
- You can extract one timesheet at a time for each individual that has submitted leave in the current period. This method takes longer as you have to process each leave record individually.

NOTE: You can only extract leave sheets for employees that fall into organizations that you have permission to view. Once timesheets have been extracted for a leave period, only the Department Originator or the Department Originator’s Proxy can access the timesheets to update time information.

Extracting Leave

In the Welcome box, type *PHATIME* and press **ENTER**.

This opens the Electronic Approvals of Time Entry form PHATIME.



1. Time Entry Method field is **Department**.
2. Entry By field should be **Leave Report**
3. COA field is **M**
4. Organization field, type the department code for the organization in which you plan to enter time.
5. Transaction Status is **"Not Started"**. *Below is the list that you can chose from but the 'Not Started' status is the only one used to extract leave into the leave period.*
 - **Not Started** – time sheets that have not been extracted for leave entry on the Electronic Approvals of Time Entry (PHATIME) form. If the Department Originator needs to extract timesheets, Not Started must be the value in the Transaction Status field.
 - **In Progress** – Time sheets that have been extracted and are ready to be edited or are in the process of being edited.
 - **Pending** – Time sheets that have been submitted to the Department Approver. Leave entry has been completed. A Department Originator cannot make changes unless time sheets are returned for correction.
 - **Approved** – Leave transactions have been approved by all Department Approvers in the routing queue. Time sheets cannot be changed once they are approved.
 - **Completed** – For leave, the leave balances are updated in the system as soon as the transactions are approved.
 - **Error** – Timesheets that have problems and may need to be corrected. Time transactions can go into Error status when submitted for approval and during the approval process. All errors that are generated can be viewed using the View Errors option of this form. The Pay History Display Errors (PHIDERR) form is used to view errors.
 - **Return for Correction** – Leave transactions that have been returned to the Department Originator by a Department Approver during the approval process. These transactions need to be corrected by the Department Originator and resubmitted to the Department Approver.
 - **All (Except Not Started)** – All timesheets that are in Approved, Completed, Error, In Progress, Pending, or Return for Correction status.

6. Year field should be current calendar year. Verify that the correct year is in the Year field. The current year is displayed by default. If this is incorrect, you can overtype it
7. Leave ID should be B1 (Bi-weekly Salaried Payroll)
8. In the Leave Number field, type the leave period. The leave period corresponds to the current payroll number. **NOTE:** The leave period must be open in order to extract timesheets.
9. Tab
10. You can either extract one employee or extract all employees in the org. If you want one employee, enter the employee's ID or enter their last name. Click ok and the one employee will extract.

If you want to extract all employees in this org, do not enter ID or last name and click OK.

Note: extracting all employees in the leave extract is the easiest way to key leave for an organization.

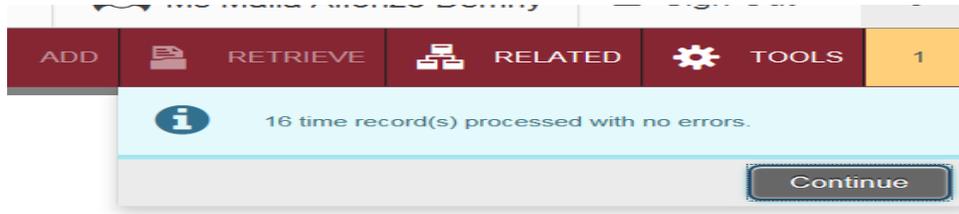
11. Up in the top right hand corner you will see a message box, notice the arrow in the above. Click yes to extract the leave records.

The screenshot displays the PHATIME 9.2.1 software interface. At the top, a dialog box titled "Time Entry Selection Criteria PHATIME 9.2.1 (banesmx)" is open. It contains the following fields: "Begin" (11/25/2017), "End" (12/08/2017), and "Check" (12/07/2017). Under the "Employee" section, there are fields for "ID" and "Last Name". The "ID" field is highlighted in blue. At the bottom of the dialog box are "OK" and "Cancel" buttons.

Below the dialog box, the main application window is visible. It has a title bar "Electronic Approvals of Time Entry PHATIME 9.2.1 (banesmx)" and a menu bar with "ADD", "RETRIEVE", "RELATED", and "TOOLS". The main area contains various input fields: "User ID" (redacted), "Superuser" (checkbox), "Time Entry Method" (Department), "Organization" (HITCO), "Year" (2017), "Leave Number" (25), "Proxy For" (empty), "Entry by" (Leave Report), "COA" (M), "Transaction Status" (Not Started), and "Leave ID" (B1). A message box in the top right corner asks "Extract Process Do you want to extract time to begin time entry?" with "Yes" and "No" buttons. A blue arrow points to the "Yes" button.

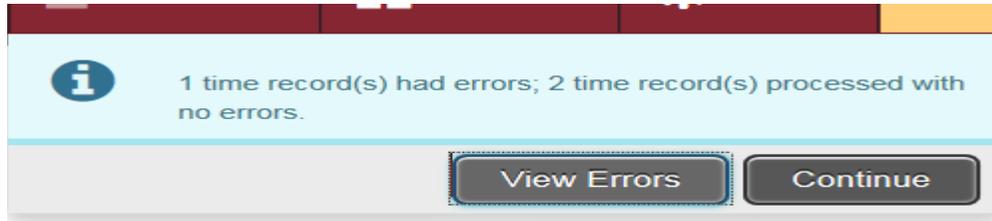
At the bottom of the application window, there are two tables. The first table is titled "JOBS" and has columns: ID, Last Name, First Name, Position, Suffix, Status, and Method. The second table is titled "TIME ENTRY" and has columns: Earn *, Earn Description, Possible Insufficient Leave Indicator, and Totals by Earn. The "Totals by Earn" column has sub-columns for "Total" and "Total Units".

At the very bottom of the application window, there is a status bar that says "Get Started. Fill out the fields above and press Go."



IF THERE ARE ERRORS IN THE LEAVE EXTRACT

- Click on View Errors



* PAY HISTORY DISPLAY ERRORS

ID	Last Name	First Name	Error
[REDACTED]	Botten	Melynda	*ERROR* An approver's job is not active as of the pay period.

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Any error messages that you get, please call Kim Slaney – HR Technology 864-2072.

****NOTE:** The other 2 employees have been extracted into the leave period. Close this error and change the “Transaction Status” in PHATIME to “In Progress” and you will find the other employees who didn’t have errors.

12. Click the **Continue** button.

The timesheets are extracted, and they are ready for completion. Click Page Up/Down to change the employee that you are viewing/updating.

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

Electronic Approvals of Time Entry PHATIME 9.2.1 (banesmxe)

ADD RETRIEVE RELATED TOOLS

User ID: [REDACTED] Proxy For: Superuser Entry by: Leave Report Time Entry Method: Department COA: M Start Over

Organization: 40100 Fac of Humanities & Social Science Transaction Status: In Progress Year: 2017 Leave ID: B1 Bi-weekly Payroll (Salaried) Leave Number: 25 11/25/2017 to 12/08/2017

JOBS

ID	Last Name	First Name	Position	Suffix	Status	Method
[REDACTED]	Angus	Josephine	S01687	00	In Progress	Department
[REDACTED]	Antlia	Iris	S01439	00	In Progress	Department
[REDACTED]	Beaulieu	Clelia	S00157	00	In Progress	Department
[REDACTED]	Chiappinelli	Eryn	S19020	00	In Progress	Department
[REDACTED]	Feringo	Laurie	S05362	00	In Progress	Department

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TIME ENTRY LEAVE BY HOUR

Earn *	Earn Description	Possible Insufficient Leave Indicator	Totals by Earn	Sat Nov 25	Sun Nov 26	Mon Nov 27	Tue Nov 28	Wed Nov 29	Thu Nov 30	Fri Dec 01	Sat Dec 02	Sun Dec 03	Mon Dec 04	Tue Dec 05	Wed Dec 06	Thu Dec 07	Fri Dec 08
		<input type="checkbox"/>															
			Total														
			Total Units														

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You have extracted all the employees in your org.

In the Jobs Window of this form, the employees are listed 5 per page (this can be changed to suit your needs) over a number of pages. To see other employees, just click on the next page arrow on this form.

Keying leave for an employee:

1. In the Time Entry Leave by Hour Window, click on their ID
2. Click in the Earn Field, type in the employee's leave code or if you don't know the code, click on the dropdown box and select the code required.
3. Tab across to the dates and enter the leave hours
4. Once you have completed entering the employee's hours, click on Tools (top right hand corner) and Submit for Approval. In the top right hand corner, a green box will appear letting you know that the time was successfully submitted. You will notice the transaction status has changed to "Pending". The "pending" status means that the leave is gone to the approver for approval.

If the employee has more than one leave code to enter:

1. Click on the Insert button or use the keyboard arrow down key
2. Enter the leave code and tab over to enter the hours
3. Once all leave has been keyed, click on Tools (top right hand corner) and Submit for Approval. In the top right hand corner, a green box will appear letting you know that the time was successfully submitted. You will notice the transaction status has changed to "Pending". The "pending" status means that the leave is gone to the approver for approval.

Saving a leave record:

1. Once leave has been entered, click on the save button in the bottom right hand corner. This will save your leave record until you are ready to submit it at a later time.

Deleting a Earn Code:

1. Click on the earn code
2. Click on the Delete button and save

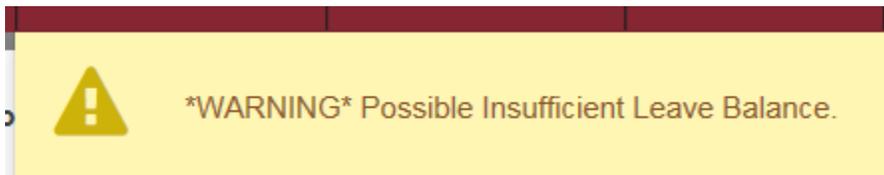
Restarting the leave extract:

1. Follow the above extract leave procedures, changing step 5 to "In Progress"
2. In the Time Entry Leave by Hour Window, click on their ID

3. Click in the Earn Field, type in the employee's leave code or if you don't know the code, click on the dropdown box and select the code required.
4. Tab across to the dates and enter the leave hours
5. Once you have completed entering the employee's hours, click on Tools (top right hand corner) and Submit for Approval. You will notice the transaction status has changed to "Pending". The "pending" status means that the leave is gone to the approver for approval. In the top right hand corner, a green box will appear letting you know that the time was successfully submitted.

NOTE: When records are submitted for approval the employee's status changes from in progress to Pending, those records are gone to your approver to review and approve.

NOTE: When you are entering/approving leave, earn codes such as, family leave, sick leave and annual leave will highlight the check box under the "Possible insufficient Leave Indicator". There is no draw down balance for sick, annual or family leave. You will have to check the employee's leave balances to make sure they have not overdrawn. Please note, family and sick leave balances are displayed as negative numbers. The negative number represents the number of hours the employee has taken, not the number of hours they have overdrawn.



Family leave will have to be monitored by your department as different unions have different family leave entitlements.

To check the hours the employee has taken

- Click on the Tools and select List Leave Balances.

Sick Leave will also appear as negative meaning those are the hours that were taken.

Family leave will have to be monitored by your department as different unions have different family leave entitlements.

Reviewing Leave Entry Records

PHIETIM – Web/Department Time Entry Inquiry

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

Memorial University Ms

Web/Department Employee Time Inquiry PHIETIM 9.0 (banesmx)

Superuser:
 Time Entry Method: * Department
 Organization: 40105
 Year: 2017
 Payroll Number: * 25

Proxy For:
 Entry By: * Leave Report
 COA: * M
 Transaction Status: * All (Except not Started)
 Payroll ID: * B1

Get Started: Fill out the fields above and press Go.

In PHIETIM

- Enter the Time Entry Method: Department
- Organization: the org you want to view
- Year: current calendar year
- Payroll number: This is the leave schedule
- Proxy For: If needed
- Entry By: Leave Report
- Transaction Status: Choose an option (The best is All (Except Not Started)) if you cannot find an employee, select the “Not Started” status
- Click the “Go” button

Memorial University Ms Malia Alfonso Demny Sign Out ?

Web/Department Employee Time Inquiry PHIETIM 9.0 (banesmx) ADD RETRIEVE RELATED TOOLS

Proxy For: Superuser: Entry By: Leave Report Time Entry Method: * Department COA: M Start Over

Organization: 40105 Department of Economics Transaction Status: All (Except not Started) Year: 2017 Payroll ID: B1 Bi-weekly Payroll (Salaried) Payroll Number: 25 11/25/2017 to 12/08/2017

ID	Last Name	First Name	Position	Suffix	Days	Units	Hours	Status	Time Sheet Organization	Time Entry Method
	Clausell	Elden	S99305	00			30.00	Pending	40105	Department
	Sedlier	Lamont	S00240	00				In Progress	40105	Department
							Total	30.00		

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Leave Returned for Correction

- When the Timekeeper makes an incorrect entry and the leave is gone for approval, the approver should find the error and send it back to the timekeeper for correction. The approver will have to notify the timekeeper personally and let them know they have returned leave for correction. The timekeeper will then go to PHATIME for that schedule and change the status for the leave schedule to “Returned for Correction”.
- If the incorrect leave code was keyed, (ie: SKW instead of SKN) it cannot be typed over. You will have to clear the record. To do this, click on RELATED and then select Clear Record. Once cleared, you will get a Saved successfully message. This means that you have successfully removed the record.
- If you need to enter another leave type, click in the Earn box and key the leave and enter the hours with the corresponding days.
- If you need to enter or remove hours. To enter hours, click in the day and key the number of hours and to remove hours, click on the incorrect hours and delete, using the delete key on your keyboard.

Managing Proxies - Department Originator/Approver

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

Adding a proxy

- In the Welcome box, type NTRPROX
- Your User ID will be displayed, click the Go button
- Click on the “Other Modules” tab
- In the “Proxy ID” type in your proxy’s user ID
- Click the “Save” button bottom right hand corner
- In the “Proxy Modules” block, in the Modules box, type in TIME (Note: the modules description will be Time Entry this is correct, even though it’s leave entry)

Removing a Proxy

- In the Welcome box, type NTRPROX
- Your User ID will be displayed, click the Go button
- Click on the “Other Modules” tab
- In the Modules block, click on TIME
- Click on the delete button found in the right hand corner of the Modules block
- Save
- In the Proxy block, click on the proxy’s ID
- Click on the delete button found in the right hand corner of the Proxy block

NOTE: When removing a proxy, you have delete the Modules block first and then the Proxy block

Acting as 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.

The screenshot shows the 'Electronic Approvals of Time Entry PHATIME 9.2.1 (banesmx)' interface. The 'Proxy For' field is highlighted with a blue arrow, indicating where to enter the Banner login ID of the person being acted upon. Other fields include User ID, Superuser, Time Entry Method, Organization, Year, Payroll Number, Entry by, COA, Transaction Status, and Payroll ID. The user is identified as Ms. Malia Alfonso Demmy.

Glossary

Term	Definition
Approver	An individual who has the ability to update, change, return, or approve the time submitted by the originator. An approver's action is required for the time entered via the Electronic Approvals of Time Entry Form (PHATIME).
Earnings Code	The code used on the Earn Code Rule Form (PTREARN) to identify a kind of pay or leave, for example regular earnings, sick pay, or vacation pay
Leave Report	A method to collect actual leave time taken that is sent through approvals and posted to leave balances.
Originator	The originator of the time transaction is the department timekeeper who extracts and begins time entry on the Electronic Approvals of Time Entry Form (PHATIME). Only an originator of a time transaction may update information in the daily breakdown area of the form once time entry has begun and the status displayed is In Progress. Other department timekeepers may access this information, but cannot change it as long as they have similar security privileges. There are two exceptions to this rule. A proxy may change time if querying a record started by someone else or a Super user may change time at any time.
Proxy	Someone who can act on another person's behalf to approve or access a time sheet. The time entry proxy has access to the Electronic Approvals of Time Entry Form (PHATIME) and the Departmental Approval Summary Form (PHADSUM). If the proxy is acting on behalf of a Super user, then the proxy also has Super user privileges and can, therefore, change or approve all time transactions, not just those for the person for whom he/she is acting.
Super user	An individual who can change or approve all time transactions. A Super user has access to the Electronic Approvals of Time Entry Form (PHATIME) and the Departmental Approval Summary Form (PHADSUM) once a pay period has closed. As a Super user, you do not have to enter a time sheet organization in the key of PHATIME, PHADSUM, or PHIETIM, unless you wish to work with records in only one organization. When you move into the detail blocks

Term	Definition
	<p>of each of these forms you'll see all employees in the pay event regardless of the time sheet organization.</p> <p>Super users can interact with a time entry transaction at any time, except when the transaction is completely approved. If a super user has originated the time transaction then they must complete it and submit it for approval.</p> <p>On PHATIME, time transactions that are In Progress attain a Pending transaction status when the Super user submits them. The approver then determines if the incomplete time is correct. If the Super user were to submit time that goes into Error status (instead of Pending), the approver and/or the Super user has the power to correct the time and approve it so it moves forward.</p>
Pending Transaction Status	The transaction status for timesheets submitted for approval by a Department Originator. The timesheets remain in the Pending transaction status throughout the approval process, until the timesheets have been fully approved or returned for correction.
Submit for Approval	The approval process for timesheets after the Department Originator submits a timesheet for approval. The transaction status changes from In Progress to Pending.