

## **BANNER HUMAN RESOURCES**

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TIME & LEAVE ENTRY

FUNCTIONAL TRAINING MANUAL FOR  
DEPARTMENTAL STAFF



# **Banner HR Departmental Time & Leave Entry**

Banner 9 Edition Revised 2018

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## INTRODUCTION TO BANNER HR TIME & LEAVE ENTRY

Banner HR gives Department Payroll Liaisons direct system access to enter timesheet information into Banner. In addition, Banner requires Payroll Liaisons to designate a Proxy or Proxies (alternates, or back-ups) for instances when they are unavailable to complete the Time Entry process. Banner also provides query pages to view timesheet information, in summary, before and after, data entry.

The period of time each month in which these hours can be entered is controlled by the Banner HR system and spans from the first day of a month until approximately mid-month. Detailed monthly time entry periods will be published on the Banner HR website: <https://banner.uncg.edu/hr/hr-dates-and-deadlines/> under the current year and titled 'Employee Leave/Time Reporting Schedule, including Pay Stub Available and Pay Dates'. The deadline for time entry is always 8pm. The date time entry must be completed is listed under the heading PHATIME Time Entry 8PM\*.

Time entry is done on a Banner HR page called PHATIME. PHATIME entry must be done separately for the different Leave ID Classes of employees

-  Hourly [HR] employees
-  EHRA & SHRA exempt [EX]
-  SHRA Non-exempt [NE].

Because the time entry screens do not display confidential information, such as pay rate, for hourly employees who have more than one job assignment active at a time, you will need to know their Banner position-suffix number combination in order to correctly match their timesheet with their job, and thus post the hours to the correct job. The timesheet template for hourly workers, SHRA & student, has been modified to include the position-suffix at the top.

The timesheets can be located on the Banner HR website:

[https://hrs.uncg.edu/Leave\\_Management/](https://hrs.uncg.edu/Leave_Management/)

Please note these timesheets are updated on an annual basis using the dates listed on the Employee Leave/Time Reporting Schedule. It is recommended you bookmark this page instead of save the timesheets to your computer as you will need to ensure the employees in your department are using the most up-to-date form each time period reported for auditing purposes.

## APPOINTING PROXIES TO ACT ON YOUR BEHALF

The Electronic Approval Proxy Rule Page (NTRPROX) permits each time-entry originator to designate *proxies*, or individuals authorized to enter time and/or leave records, in their absence. You can designate multiple proxies, but each one must have the same security access as you, or they won't be able to see the information needed to complete the entry tasks.

### You are required to:

- ✚ Establish at least one Proxy for Time Entry purposes in the event you are unable, for whatever reason, to complete the time entry process during the window of time for time entry.
- ✚ Establish proxies that have the same Time Entry authority and security as *your* User ID. A proxy is someone who would act on your behalf to approve or enter time for a time transaction in your absence.

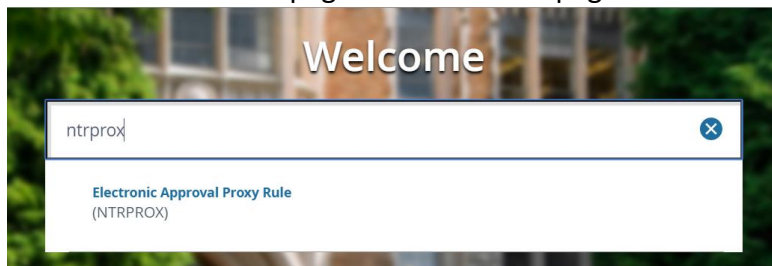
If you fail to do so, and you become unavailable (vacation, illness, or for whatever reason!), what will happen?

- ✚ No one can attempt to finish the time entry for your department, or to alter any time or leave records you had begun.
- ✚ The employees in your department might not be paid, or might be paid incorrectly!

## NTRPROX - APPOINTING A TIME-ENTRY PROXY

In Banner

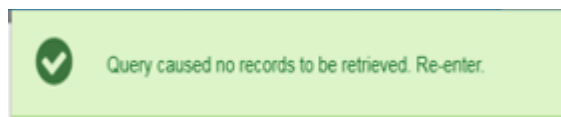
- ✚ Access the **NTRPROX** page from the Main page search bar by entering NTRPROX. Press Enter.



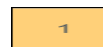
[Press  or **Alt+PageDown**]



You will be directed to the entry page. Banner displays the following message on either the Electronic Approval page or Other Modules page:



Click on the Highlighted Number Box to close the messages.



A screenshot of the NTRPROX application interface. The top navigation bar shows "Electronic Approval Proxy Rule NTRPROX 9.3.3 (UGVAL4)" and a "TOOLS" button. A banner message is displayed: "Query caused no records to be retrieved. Re-enter." The main content area has two tabs: "Electronic Approval" and "Other Modules". The "Electronic Approval" tab is active, showing a table with columns "Level Code", "Description", and "Approval Level". The table is empty, and the pagination shows "Record 1 of 1".

When you first open NTRPROX, the page defaults to the “Electronic Approval” tab. To access the “Other Modules” tab – click on the “**Other Modules**” tab or press **Alt+Page Down (Twice)**

A screenshot of the NTRPROX application interface with the "Other Modules" tab selected. The "PROXY" section shows a table with columns "Proxy ID \*", "Description", and "Admin ID". The table contains one record: "SSDO05" with description "Scrappy Doo". The "PROXY MODULES" section shows a table with columns "Modules" and "Modules Description". The table contains one record: "TIME" with description "Time Entry".

The cursor will default into the first line on the Proxy ID Field. If you do not have a current Proxy set up, follow the instructions listed below. If you need to enter a new proxy or more than one proxy, you will need to arrow down to the next available Proxy ID line.



Enter the “User Name” of the person who will be your proxy.

Press TAB to retrieve the Proxy’s name


Place your cursor in the Proxy Modules section or press **Alt+PageDown** to proceed to the Proxy Modules section

Enter the word “**TIME**” in the Modules field – if you do not enter TIME in this space, the proxy will not be able to enter time or change time for you. See reference below.

Proxy ID *	Description	Admin ID
SSDO05	Scrappy Doo	
CMDO85	Cat Man Do	

Modules	Modules Description
TIME	

Click  to save your record. 'X' out of this page.

The time entry proxy has access to the Electronic Approvals of Time Entry Page (PHATIME) and the Web/Department Employee Time Page (PHIETIM).

When you have completed the Proxy set up, please ensure your Alternate Payroll Liaison(s) have set you up on NTRPROX as well.

**In addition to filling out the NTRPROX page as described above, your Proxy must attend Banner HR Time & Leave Entry training, and submit a Banner HR Access form to gain access to your Time/Leave records.**

Use of the NTRPROX page is only for initial set up of your proxy and/or proxies and for changes you may need to make in the future. Please be aware once you have appointed your proxy, you cannot remove this name from the system. You would add a new name if there are changes in your department. In order to ensure the previous individual does not have access, you will need to notify the Systems Support Specialist responsible for making security changes for your Org.

## ORGANIZING THE TIME ENTRY WORKFLOW

If you have multiple ORG numbers assigned to your department, you can use them to better organize the employees on your timekeeping lists. For instance, let's say your department has these org numbers:

17778                      17780                      17782

You can have the HR office reassign your departmental employees to a particular ORG number for timekeeping purposes. In Banner, the timekeeping ORG operates completely independently of the ORG in which the employee works – or the ORG that gets charged for their salary.

You could put all of the employees that do not report leave into Timekeeping Org# 17782. That way they are isolated off to themselves, and you simply ignore them for timekeeping purposes – just don't call up Org 17782 on PHATIME.

You could put all of your employees into one timekeeping ORG number. This is especially recommended for those who have employees scattered among many ORG numbers. With everyone assigned to one number, you don't have to start time entry so many times!

## BALANCING TO TIMESHEETS or CHECKING YOUR WORK

There is no printed report produced by the time/leave entry process with which to balance your work. With your direct access to time/leave entry, the middle-man has been removed from the workflow, along with the opportunity for errors. Fewer steps = fewer errors!

To check your work, there are two options:

**Review each timesheet as you enter it.** When you have completed all the time/leave for a given employee, pause to compare what is on your screen with the paper timesheet submitted by that employee. Make any necessary corrections. If it is correct, it will stay that way – Banner doesn't sneakily change your work overnight!

**Use the PHIETIM page to review totals.** The PHIETIM page shows a grand total of hours entered on each employee. You can use this view to compare totals on timesheets to totals on Banner. If you want to check the individual lines of time you entered, that detail can only be viewed on the PHATIME page.

At the end of the month, following the monthly payroll, a Departmental Leave Balances report (PWRWLBAL) is available through HR EPrint. This report lists the current leave balances for all employees in a given organization number. You must have security access to EPrint for your org in order to view this report (See BANNER HR REPORTING documentation for additional information regarding the Departmental Leave Balance report).

## PHIETIM – Verify Information Prior to Beginning Time Entry

Before you begin time entry, you **should** use the PHIETIM query page to show a listing of employees assigned to your leave report organization. You **should** use this listing to verify that all employees for whom you are responsible for are indeed showing on the screen, and to verify that you have received a timesheet for all the employees displayed. You **should** verify that all position numbers listed for employees belong to your organization code or codes.

The time entry originator (Payroll Liaison) and the designated proxy and/or proxies have access to this page. You cannot access this information without the proper security setup.


In Banner HR, *all* employees are assigned to a timekeeping org, even if that employee doesn't track time or leave (doesn't turn in a timesheet). **Check with the HR Office responsible for your employees to confirm whether they should track time via a timesheet due to ACA Healthcare Laws.**

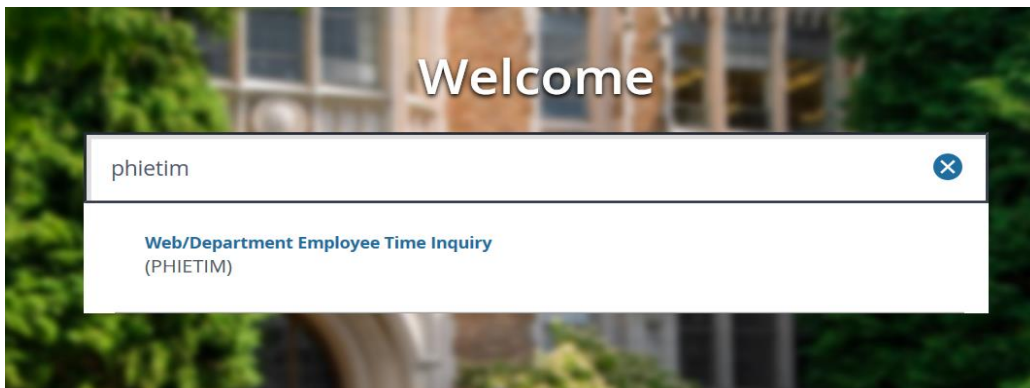
**!** A proxy and/or proxies have the same privileges as the originator *only if* the proxy and/or proxies have the same Time Entry security setup as that originator.

**!** PHIETIM is used prior to starting your time entry, to verify that all employees for whom you are responsible for are indeed showing on your screen, and that you have a timesheet for all the employees Banner displays.

### KEY BLOCK

In Banner

 Access the **PHIETIM** page from the Main page search bar by entering PHIETIM. Press **Enter**.





Use the Key block of PHJETIM to select the time sheet information that determines which employees display in the Employee section. All fields are required, except 'Proxy For'. A different value in any of the fields can create different results or no results.

The **User ID** of the person accessing this page is displayed in the top left corner. In order to access this page, the user must be defined. Display only. This would be the originator (Payroll Liaison). **This would be the individual who has logged into Banner. This is an auto completed field.**

Banner requires entry of these fields in a particular order. You should **[TAB]** your way through the fields. Cursor defaults to Organization field and ends with COA field. You must place your mouse in the Proxy field if you need to enter this information.

The screenshot shows the PHJETIM 9.3.4 (UGVAL4) web interface. The form contains the following fields and values:

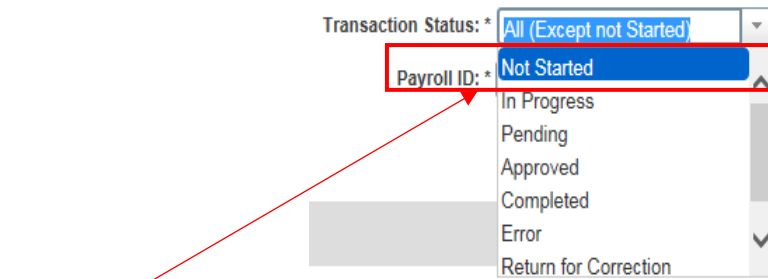
- User ID: Scooby Doo
- Proxy For: (empty)
- Entry By: Leave Report
- COA: G
- Transaction Status: Not Started
- Organization: 56202
- Accounting Services: (empty)
- Year: 2018
- Payroll ID: HR
- Payroll Number: 5


A yellow box with the text **\*\*Payroll ID MUST be entered before entering Payroll Number\*\*** is located at the bottom right of the form.

- 1. Organization** – The organization for which time sheet information is displayed. Only valid combinations of COA codes and organization codes are allowed since Banner Finance is installed. You can only view time records for Orgs where you have been granted security access. **[TAB]**

**Transaction Status** - The current status of the leave reports. The selection that you make in this field queries the remaining information on PHJETIM. Your first time accessing time sheets for this pay period, select 'Not Started' from the drop down menu. **[TAB]** (See illustration next page)




Complete descriptions for time transactions appear later in this document, under the Electronic Approvals of Time Entry Page (PHATIME).



 **Not Started** – Transactions for time have not been extracted for entry. [TAB]

**Year** - The current payroll year. This information defaults into the system. You will need to change the year on the 1<sup>st</sup> payroll of the new year. [TAB]




2. **Payroll ID** - The payroll ID identifies the three populations of employees at UNCG for the leave report. **This field MUST be entered prior to entering the Payroll Number.** Manually enter the value, then [TAB]:

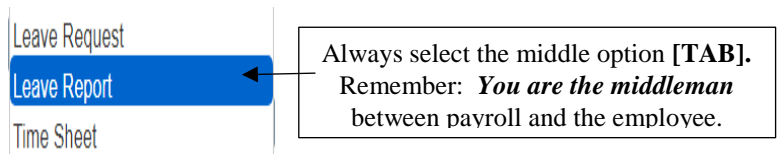
-  HR – for departmental hourly, graduate hourly, work-study students and SHRA temporary employees
-  NE – for non-exempt SHRA employees
-  EX – exempt SHRA and all EHRA employees; undergraduate/graduate flat pay

3. **Payroll Number** – This is a 1 or 2 digit number that identifies the month being **paid**. (Example: Jan = 1, Feb = 2, Dec = 12, etc.) Pay period dates for recording Leave display based on selected Payroll ID and will **NOT** match the calendar month in all cases [TAB].





**!** For SHRA NE (non-exempt) employees, Banner only recognizes a maximum of 31 days in a pay period, the Leave Period will be based on the SHRA Monthly Schedule published on the HR Website found at:  
<https://banner.uncg.edu/hr/hr-dates-and-deadlines/>

4. **Entry By** - Pull down list identifying type of time entry activity. This determines what information will be displayed on the remaining sections of PHJETIM. Values are:

-  *Time Sheet* (default)
-  **Leave Report** –! UNCG will always use **Leave Report**
-  *Leave Request* – not used by UNCG



**Time Entry Method** - The type of time sheet or leave request. **This is a required field.**  
[System defaults to **Department**] **[TAB]**

-  **All** - Retrieves timesheet information that has been entered through self-service, department or third party time entry, or retrieves leave request information that has been entered through self-service, department or third party – not used at UNCG
-  **Department** - Retrieves decentralized timesheet/leave report/leave request information that has been entered on the Electronic Approvals of Time Entry Page (PHATIME).
-  **Third Party** – not used at UNCG
-  **Web** - not used at UNCG

**! UNCG will *always* use **Department** for [Time Entry Method].**  
**This selection defaults when you enter this page.**

**COA – ‘G’** - The chart of accounts used by the Banner Finance system

 Click the  button or press **Alt+PageDown**.

If you do not see a display of the employees you want in the WEB/DEPARTMENT EMPLOYEE TIME Listing Section, it may be because you have not selected the correct options in the Key Block.

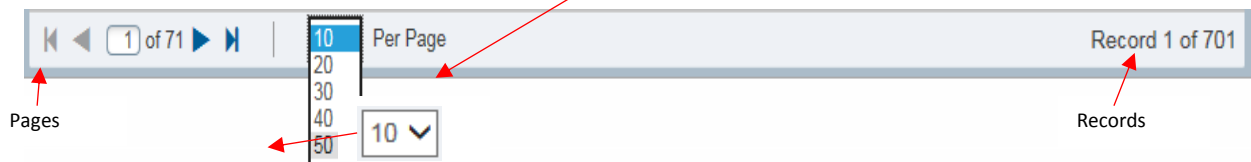
You can click the  button and reselect your options.

## EMPLOYEE DETAIL LISTING SECTION – All fields are display-only

This section identifies the employees that meet the criteria listed in the Key block of PHIETIM - employees for that organization number, with that Payroll ID.

**ID** - Employees are listed alphabetically by name with their ID.

**Last Name – First Name** - Use the vertical scroll bar to the right to display other employees. You may select the number of employees to be displayed by using the **drop down arrow** under Per Page at the bottom left corner. Here you can also identify the number of pages. The scroll bar will ONLY work with the current number displayed per page. The information bar will also identify the number of records (position/suffix) for this org and this Payroll ID.



The blue information bar at the bottom of the page will also identify the number of records.



**Position & Suffix** - The employee's unique Position + Suffix associated with the Organization Field listed in the Key block defaults to this field.

**Days** – UNGC will not have information displayed in this field.

**Units** – UNGC will not have information displayed in this field.

**Hours** – Prior to time entry, the Hours field will be blank.

**Status** - The transaction status of the individual employee's leave report.

The value that is displayed in the **Status** field in the Employee Detail Listing section is the same as the value selected for the **Status** field in the Key block, except when *All (Except Not Started)* is selected in the Key block. When this happens, the individual status displays in the Employee Detail Listing section.

**Time Sheet Organization** – This field displays the current organization for which you querying.

**Time Entry Method** – This field will always reflect Department.

Scroll through your PHIETIM results to verify that all the displayed employees are correctly placed in your leave report organization, and that you have received a timesheet from every employee on this list which reports time or leave. Remember – **ALL** employees are assigned to a timekeeping list, so you will see employees that do not turn in timesheets. It's okay to ignore those folks for these purposes.

**NOTE:** Remember the system is looking back at the prior month for leave reporting. If you have a new employee, which started during the current month, you will not see this employee listed until next month.

If you have an employee in your organization that **does not** appear on PHITIM (and you are sure you've selected the correct options in the Key Block!), **OR** you have an employee listed on PHITIM that is NOT in your leave report organization, you may select from the following options:

- review NBAJOBS to determine if the job is set up in the system correctly
- review EPAF Summary to determine if your EPAF has not progressed as expected
- call the appropriate Department for assistance as described below

**UNCG Human Resources:** SHRA Permanent, Undergraduate Flat Pay, Undergraduate Hourly, SHRA Temporary, Work Study Hourly and EHRA Non-Faculty

**Graduate School:** Graduate/Teaching/Research Assistantships & Graduate Hourly employees

**Faculty Personnel Services:** EHRA Faculty

'X' out of PHITIM



**STOP!!!!**  
**DO NOT ENTER LEAVE ON EMPLOYEES WHO HAVE TERMINATED in the **previous month**.**  
**Give the appropriate timesheets to UNCG Human Resources or the**  
**Faculty Personnel Services Office.**

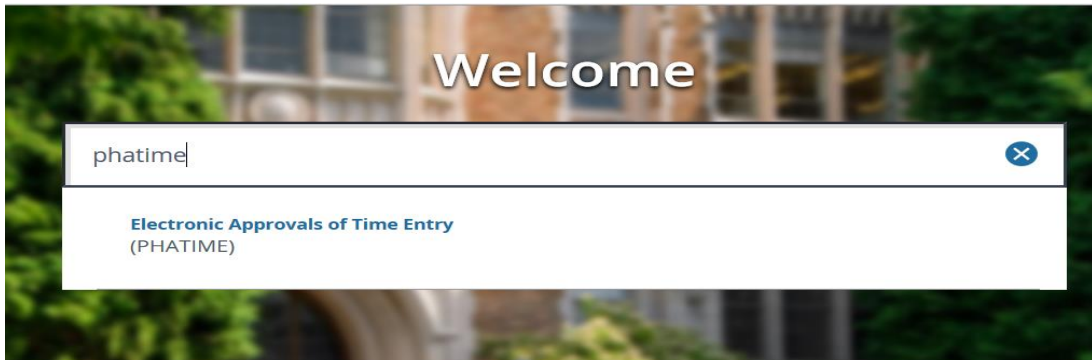
## **PHATIME - ENTERING HOURS WORKED and/or LEAVE TAKEN**

At the end of each pay period, employees at UNCG report their hours worked and/or leave taken for that period to their supervisors for approval. Once approved, these time records are collected by the appropriate Department Payroll Liaison for entry into Banner HR.

These time records will be used to calculate the employee's paycheck and adjust their leave balances (if they accrue leave). Leave balances and pay stubs will be available on pay-day for on-line viewing, by the employee, through UNCGenie.

In Banner

- ✚ Access the **PHATIME** page from the Main page search bar by entering PHATIME. Press **Enter**.



### KEY BLOCK

- ✚ Use the Key block of PHATIME to select the parameters that determine which employees display in the Employee block.

**NOTE:** If you viewed PHATIME prior to selecting PHATIME, the information in the key block is the same on this page. Proceed to Page 15.

Banner requires entry of these fields in a particular order. You should **[TAB]** your way through the fields. Cursor defaults to Organization field and ends with COA field. You must place your mouse in the Proxy field if you need to enter this information.

All fields are required, except 'Proxy For'. A different value in any of the fields can create different results or no results.

The **User ID** of the person accessing this page is displayed in the top left corner. In order to access this page, the user must be defined. This would be the originator (Payroll Liaison). **[This would be the individual who has logged into Banner. This is an auto completed field.]**

**!** If you are acting as a proxy, you will need to indicate that in the section title **Proxy For** next to your displayed **ID**. Enter the "User Name" for the Payroll Liaison for whom you are acting as proxy. This would be the user name of the individual who brought time in for entry this month.

Web/Department Employee Time Inquiry PHITIM 9.3.4 (UGVAL4)

ADD RETRIEVE RELATED TOOLS

Go

User ID: Scooby Doo

Proxy For: ...

Superuser: ☐

4. Entry By: \* Leave Report

Time Entry Method: \* Department

COA: \* G

1. Organization: 56202

Transaction Status: Not Started

Accounting Services

Year: \* 2018

2. Payroll ID: HR

3. Payroll Number: 5

**\*\*Payroll ID MUST be entered before entering Payroll Number\*\***

1. **Organization** – The organization for which time sheet information is displayed. Only valid combinations of COA codes and organization codes are allowed since Banner Finance is installed. You can only view time records for Orgs where you have been granted security access [TAB].




**Transaction Status** - The current status of the leave reports. The selection that you make in this field queries the remaining information on PHITIM. Your first time accessing time sheets for this pay period, select **'Not Started'** from the drop down menu [TAB].

- First time accessing time sheets for this payroll, **Not Started**
- Once you extract time sheets for this payroll, **In Progress**
- Once this payroll cycle is done, **Completed**

**[NOTE: If time is not submitted for a position/suffix job during this payroll time period, the position/suffix will default back to 'Not Started' during payroll processing.]**

**Year** - The current payroll year. This information defaults into the system, however, you will need to change it on the 1<sup>st</sup> payroll of the new year [TAB].


2. **Leave ID** - The leave ID identifies the three populations of employees at UNCG for the leave report. This field **MUST** be entered prior to entering the Payroll Number. Manually enter the value, then **[TAB]**:

-  HR – for departmental hourly, graduate hourly, work-study students and SHRA temporary employees
-  NE – for non-exempt SHRA employees
-  EX – exempt SHRA and all EHRA employees

3. **Leave Number** – This is a 1 or 2 digit number that identifies the month being **paid**. (Example: Jan = 1, Feb = 2, Dec = 12, etc.) Pay period dates for recording Leave display based on the selected Leave ID and will **NOT** match the calendar month in all cases. **[TAB]**

! For SHRA NE (non-exempt) employees, Banner only recognizes a maximum of 31 days in a pay period, the Leave Period will be based on the SHRA Monthly Schedule published on the HR Website found at:  
<https://banner.uncg.edu/hr/hr-dates-and-deadlines/>

4. **Entry By** - Pull down list identifying type of time entry activity. This determines what information will be displayed on the remaining sections of PHATIME. Values are:

 Time Sheet (default)


 **Leave Report** – ! UNCG will **always** use **Leave Report**


 Leave Request





Always select the middle option **[TAB]**.  
Remember: ***You are the middleman*** between payroll and the employee.

**Time Entry Method** - The type of time sheet or leave request. **This is a required field.**  
[System defaults to **Department**] **[TAB]**

 **All** - Retrieves timesheet information that has been entered through self-service, department or third party time entry, or retrieves leave request information that has been entered through self-service, department or third party – not used at UNCG

 **Department** - Retrieves decentralized timesheet/leave report/leave request information that has been entered on the Electronic Approvals of Time Entry Page (PHATIME).


 **Third Party** – not used at UNCG

 **Web** - not used at UNCG

**COA** – ‘G’ - The chart of accounts used by the Banner Finance system

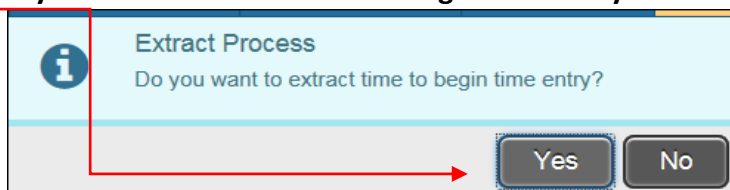


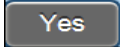
## BEGIN TIME ENTRY

To begin time entry, click the  button or press **Alt+PageDown**.

Click  in the message window if you want to extract time to begin time entry.

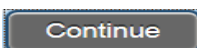
Banner has some odd wording!  
This question actually means "do you want to begin time entry?"

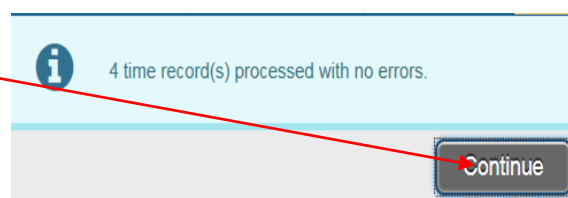


Only click  if you are the one to enter time for your department's employees for this Leave ID. Once you extract employees for time entry during a pay period, those employees are locked under your User ID, **so only you and your proxies can enter time for that pay period**. If others in your department want to work on time/leave afterwards, they will have to go in as your Proxy to see these records.

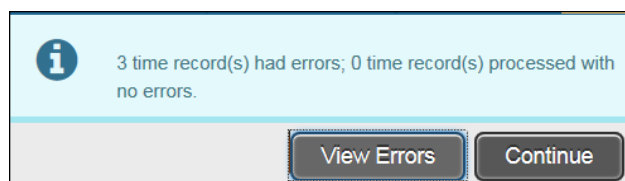
A message window will appear stating how many record(s) were processed and how many record(s) had errors.

If there are no errors, click





You may receive a message window stating how many record(s) were processed and how many record(s) had errors.



If the message displays error messages, if you click on View Errors or Continue, it will return you to the Key Block. The Transaction Status does not change from [Not Started] to [In Progress], so you in effect haven't started time entry. Correct the choices in your Key Block and try again. If making corrections to the key block does not fix the issue, please contact [payroll1@uncg.edu](mailto:payroll1@uncg.edu) for assistance. Errors **MUST** be corrected in order to continue with the time entry process.

**Electronic Approvals of Time Entry PHATIME 9.3.3 (UGVAL4)**

User ID:  Proxy For: Superuser: ☐ Entry by: Leave Report Time Entry Method: Department COA: G

Organization: 56202 Accounting Services Transaction Status: In Progress Year: 2018 Leave ID: HR Hourly

Leave Number: 5 04/11/2018 to 05/10/2018

**JOB S**

ID	Last Name	First Name	Position	Suffix	Status	Method
896125518	Adeal	Let's Make	T99864	00	In Progress	Department
888982340	First	Safety	D99864	00	In Progress	Department
895054204	Lemonade	Pink	T99862	00	In Progress	Department
881880264	Times	Hilarious	W99864	00	In Progress	Department

Record 1 of 4

**TIME ENTRY LEAVE BY HOUR**

Earn *	Earn Description	Possible Insufficient Leave Indicator	Totals by Earn	Wed Apr 11	Thu Apr 12	Fri Apr 13
		<input type="checkbox"/>				
	Total					
	Total Units					

EDIT Record: 1/4 PHVTIME PHVTIME\_ID [1] ellucian

Or - to search for a specific employee use the F7 key and choose the fields to filter and locate the specific employee, then press F8 to activate your query

## Rev. 05/08/2018

## JOBS SECTION DISPLAYED

This section identifies the employees that meet the criteria listed in the Key block of PHATIME  
- employees for that organization number, with that Leave ID.

**ID** - Employees are listed alphabetically by name with their ID.

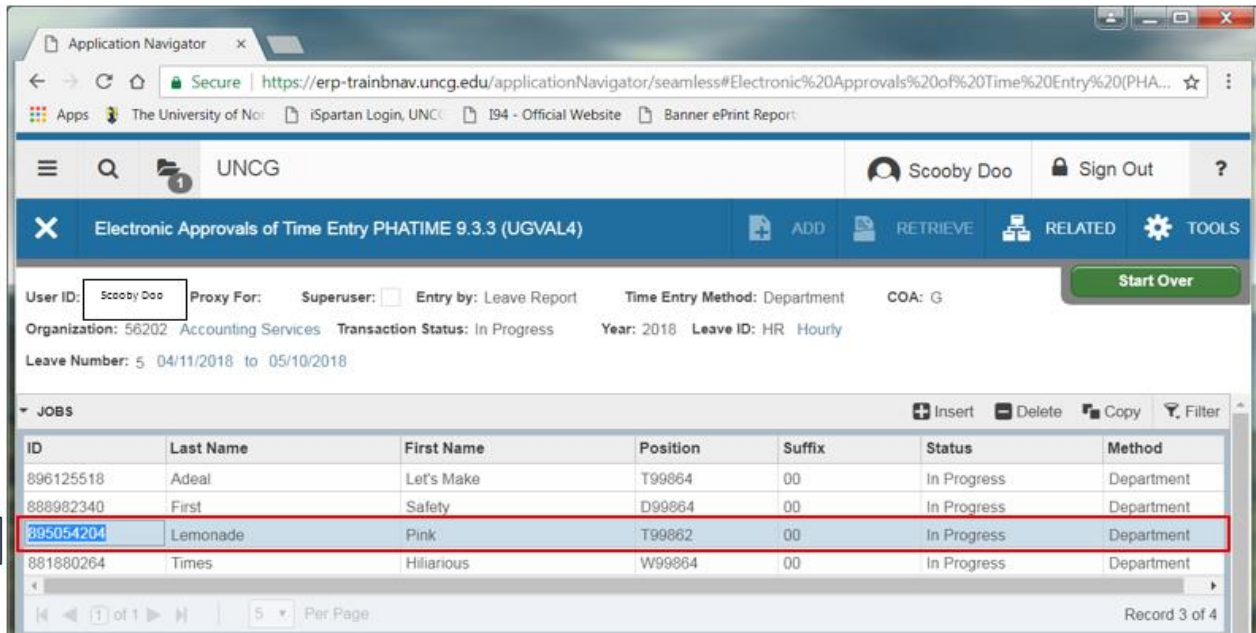
**Last Name – First Name** - Use the vertical scroll bar to the right to display other employees. You may select the number of employees to be displayed by using the **drop down arrow** under Per Page at the bottom left corner. Here you can also identify the number of pages. The scroll bar will ONLY work with the current number displayed per page. The information bar will also identify the number of records (position/suffix) for this org and this Payroll ID.

The blue information bar at the bottom of the page will also identify the number of records.

ID	Last Name	First Name	Position	Suffix	Status	Method
896125518	Adeal	Let's Make	T99864	00	In Progress	Department
888982340	First	Safety	D99864	00	In Progress	Department
895054204	Lemonade	Pink	T99862	00	In Progress	Department
881880264	Times	Hilarious	W99864	00	In Progress	Department

Earn *	Earn Description	Possible Insufficient Leave Indicator	Totals by Earn	Wed Apr 11	Thu Apr 12	Fri Apr 13
		<input type="checkbox"/>				
	Total					
	Total Units					

## ENTER HOURS



Application Navigator x

Secure | [https://erp-trainbnav.uncg.edu/applicationNavigator/seamless#Electronic%20Approvals%20of%20Time%20Entry%20\(PHA...](https://erp-trainbnav.uncg.edu/applicationNavigator/seamless#Electronic%20Approvals%20of%20Time%20Entry%20(PHA...)

Apps The University of No iSpartan Login, UNCG I94 - Official Website Banner ePrint Report

UNCG Scooby Doo Sign Out ?

Electronic Approvals of Time Entry PHATIME 9.3.3 (UGVAL4) ADD RETRIEVE RELATED TOOLS

User ID: Scooby Doo Proxy For: Superuser: Entry by: Leave Report Time Entry Method: Department COA: G Start Over

Organization: 56202 Accounting Services Transaction Status: In Progress Year: 2018 Leave ID: HR Hourly

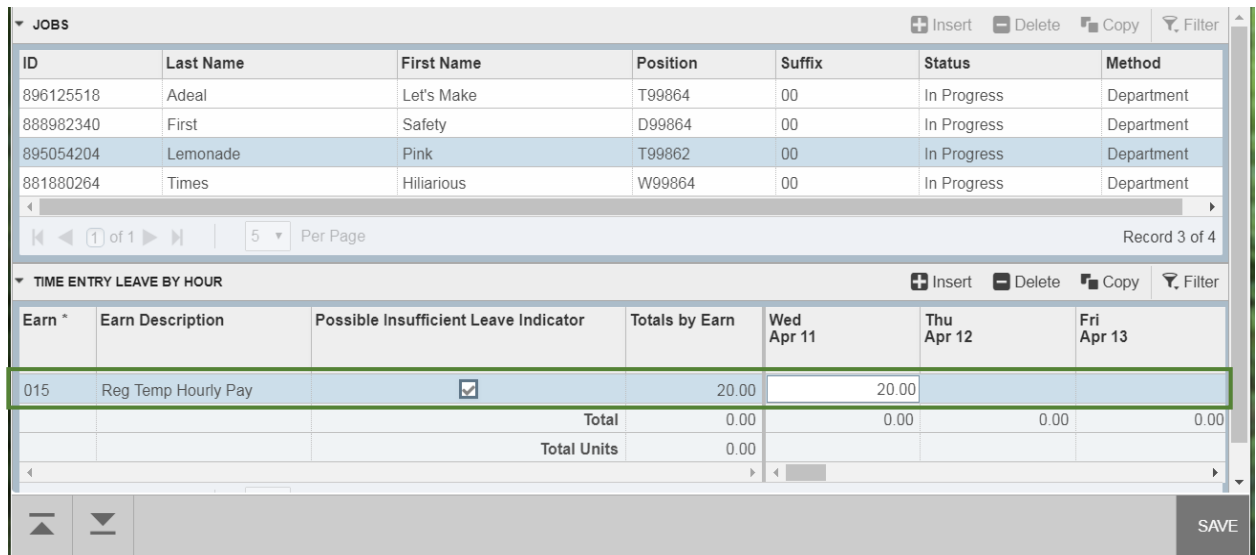
Leave Number: 5 04/11/2018 to 05/10/2018

JOBS Insert Delete Copy Filter

ID	Last Name	First Name	Position	Suffix	Status	Method
896125518	Adeal	Let's Make	T99864	00	In Progress	Department
888982340	First	Safety	D99864	00	In Progress	Department
895054204	Lemonade	Pink	T99862	00	In Progress	Department
881880264	Times	Hilarious	W99864	00	In Progress	Department

Record 3 of 4

- 1 When you find an employee you need to enter time on (just double click on the ID number or name to highlight it in blue).



JOBS Insert Delete Copy Filter

ID	Last Name	First Name	Position	Suffix	Status	Method
896125518	Adeal	Let's Make	T99864	00	In Progress	Department
888982340	First	Safety	D99864	00	In Progress	Department
895054204	Lemonade	Pink	T99862	00	In Progress	Department
881880264	Times	Hilarious	W99864	00	In Progress	Department


Record 3 of 4

TIME ENTRY LEAVE BY HOUR Insert Delete Copy Filter

Earn *	Earn Description	Possible Insufficient Leave Indicator	Totals by Earn	Wed Apr 11	Thu Apr 12	Fri Apr 13
015	Reg Temp Hourly Pay	<input checked="" type="checkbox"/>	20.00	20.00		
	Total		0.00	0.00	0.00	0.00
	Total Units		0.00			

SAVE

- 2 Click into a line in the **Time Entry** section to enter the time.

Manually enter the appropriate Earn Code (most are listed on the timesheets) and press Tab, or Use the “ellipsis”  to view a listing of eligible Earn Codes. Double-click to select an Earn Code from the list.

**!** Banner only displays Earn Codes that are valid for that particular employee (based on their EClass designation - See Appendix A for a list of all EClasses)

## DON'Ts:

- Do NOT enter “0” in any of the time entry fields. If no earnings/leave, no entries.
- Do NOT enter any hours in any day other than the **first** day showing for this pay month no matter what day of the week is reflected.

**DO NOT ENTER TIME ON ANY POSITION WITH AN ALPHA CHARACTER IN THE SUFFIX**

st Name	First Name	Position	Suffix	Days	Units	Hours	Status	Time Sheet Organization	T
bycakes	Lovely	000100	00				Not Started	56202	P
bycakes	Lovely	000100	PO				Not Started	56202	P
hite	Snow	000090	00				Not Started	56202	P
hite	Snow	000090	SV				Not Started	56202	P

- 3** Enter the total number of hours worked, or leave taken for each Earn Code, in the **FIRST TIME SLOT** regardless of the Calendar Date shown. After entering the total hours for that earn code, click Enter, then arrow down to the next line.

**JOBS**

ID	Last Name	First Name	Position	Suffix	Status	Method
896125518	Adeal	Let's Make	T99864	00	In Progress	Department
888982340	First	Safety	D99864	00	In Progress	Department
895054204	Lemonade	Pink	T99862	00	In Progress	Department
881880264	Times	Hilarious	W99864	00	In Progress	Department

1 of 1
5 Per Page
Record 3 of 4

**TIME ENTRY LEAVE BY HOUR**

Earn *	Earn Description	Possible Insufficient Leave Indicator	Totals by Earn	Wed Apr 11	Thu Apr 12	Fri Apr 13
015	Reg Temp Hourly Pay	<input checked="" type="checkbox"/>	60.00	60.00		
080	Holiday Premium Pay	<input checked="" type="checkbox"/>	8.00	8.00		
092	Overtime at 1.5 Temps	<input checked="" type="checkbox"/>	2.00	2.00		
Total			70.00	70.00	0.00	0.00

**3**

2

SAVE

4



4

Click the **SAVE** button or press **F10** after entering all earn codes associated with time entry for each employee to save the hours entered on PHATIME.

You will receive a windows message indicating the number of rows which have been successfully saved.



Saved successfully (6 rows saved)

## POSSIBLE INSUFFICIENT LEAVE INDICATOR

Banner will place a ☒ in the Possible Insufficient Leave Indicator column whenever the number of hours you have entered exceeds the number of accrued hours in the employee's leave bucket. For some types of leave, this is an important flag: Vacation, Sick, Bonus leave, for instance.

For other types, this is a non-issue because we don't accumulate balances: Military Leave, Overtime, Disaster Relief Leave, and Hourly pay for instance. Watch for check marks here, and take action if appropriate.

Possible Insufficient Leave Indicator



An added feature of Banner 9 are the windows messages. You may receive a warning about possible insufficient leave balances as well as the check mark.



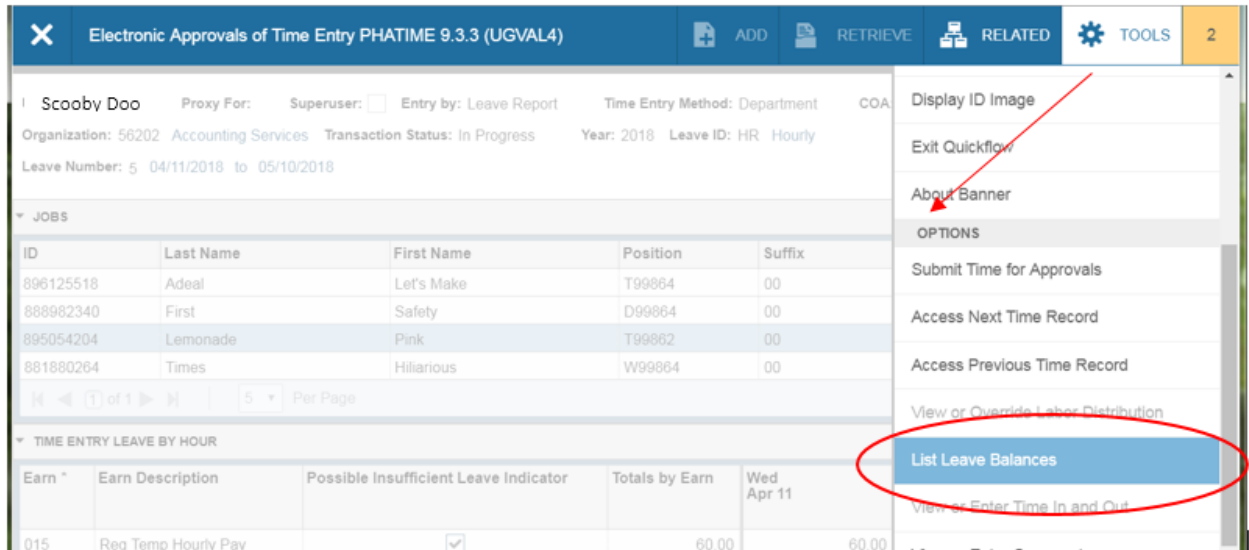
\*WARNING\* Possible Insufficient Leave Balance.

## VIEW LEAVE BALANCES

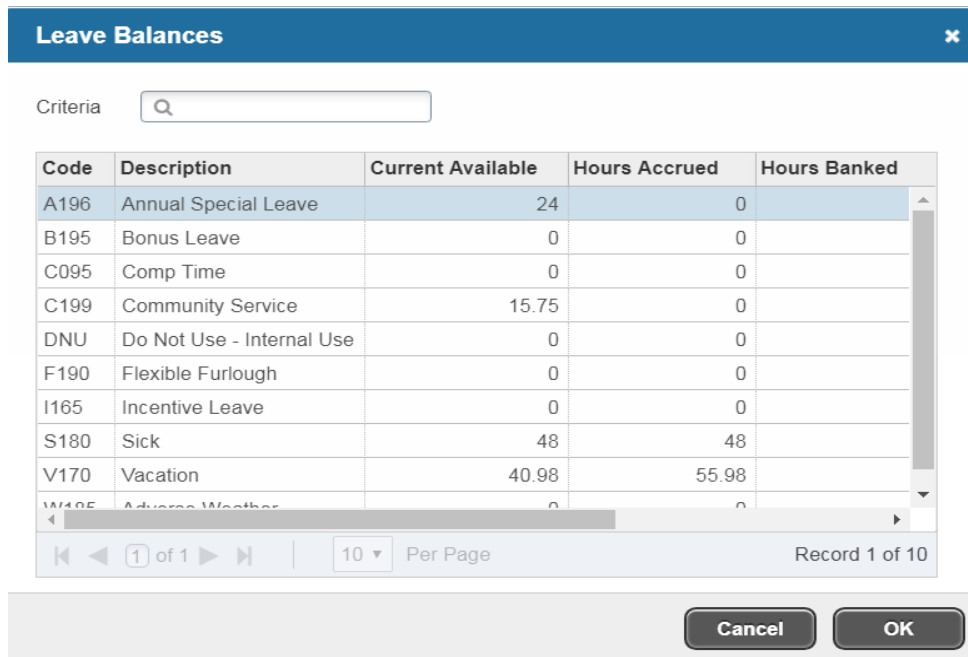
To view the current leave balances for an employee for whom you are entering time,



Select  **TOOLS**, **OPTIONS**, List Leave Balances




This will enable you to view a pop-up window with the leave balances for the employee currently in the “Employee ID” section.

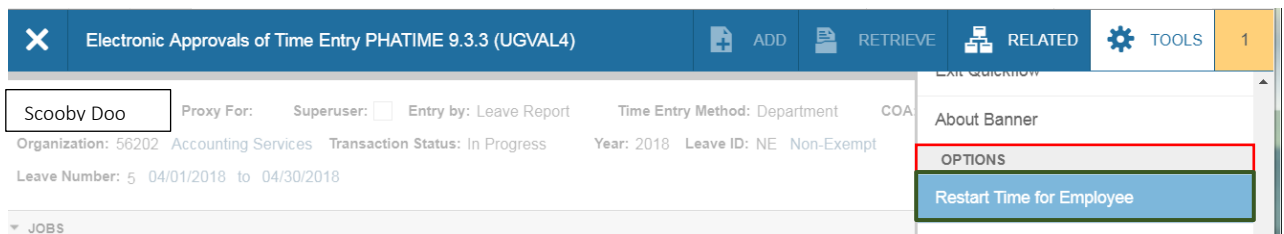


Depending on the information shown, you may need to return their timesheet for corrections before you can continue.

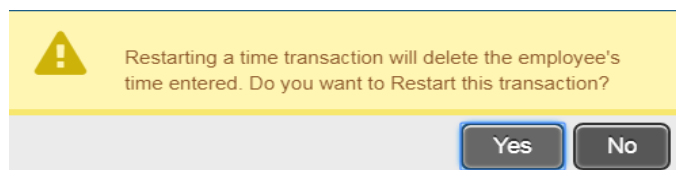
If you need to return the time sheet to the employee for correction, you should delete all earn code time entries from PHATIME. You will re-enter when the employee has updated their time sheet with the correct information.


To remove all time transactions entered for an employee, all at the same time (you selected the wrong employee, or want to begin afresh) follow the following steps:

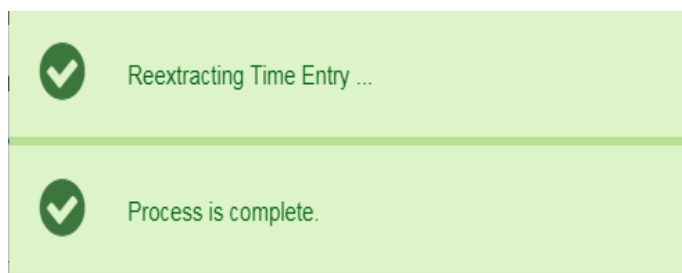
- highlight the employees Job row by placing your cursor in the ID field
- select  **TOOLS** from the window options
- under the **Options** menu section, select 'Restart Time for Employee'.



This action removes data that has been entered, and restarts the time transaction for the employee. You will receive the following Banner 9 message windows.




You will receive the following Banner 9 message window. Select 






## CHOOSE ANOTHER EMPLOYEE FOR TIME ENTRY

 Place your cursor in the Jobs section:

Select an employee by using the arrow keys on your keyboard (with the cursor in the ID field) to navigate through them one at a time

Or – by placing your mouse in the ID field for the employee for whom you want to enter time, checking to make sure you have selected the correction position/suffix

Or - to search for a specific employee use the F7 key and choose the fields to filter and locate the specific employee, then press F8 to activate your query

As you  or **F10** each employee's time records, the Transaction Status remains [In Progress].

## WHAT IF THERE IS NO TIME REPORTED?

Employees who took no time or leave for a given month require no action. Keep their timesheets in your file for the required retention period for auditing purposes. Do not enter zero hours, or any other actions in Banner HR for employees who took no time. Banner is automated to issue a standard paycheck for each salaried employee, so that employee will receive a regular monthly paycheck.


All employees in Banner HR are assigned to a timekeeping org, even if they do not earn paid leave, or report paid leave. For those employees, simply ignore them!

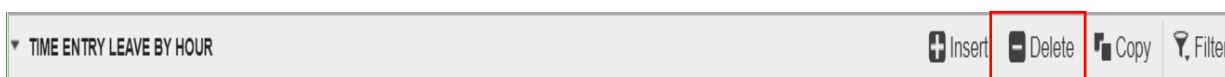
## COMPLETING TIME ENTRY

There is no “submit” process! There's no button to click, or status to change! Time entries that are at status “In Progress” sit ready & waiting for the Payroll Department to begin payroll processing. You have until the monthly deadline to enter and/or edit time entries. After the deadline, Payroll processes will gather time entries from the entire Banner HR system and they will no longer be available for changes.

## REMOVE or CORRECT TRANSACTIONS

Once you've selected an Earnings Code on a time entry line, Banner will not allow you to change the Earn Code, or to delete the Earnings Code using the Del or Backspace keys.

To remove one time transaction entirely from the screen, place your cursor in the [Earn Code] field on that line, and then select [  Delete ] from the menu bar at the top and to the right of the TIME ENTRY LEAVE BY HOUR Section or **Shift F6**. This action completely removes the Earn Code record from PHATIME.



## I'M FINISHED, NOW WHAT? 'X' out of PHATIME



## PHIETIM – Time and Leave Summary Page

The Web/Department Employee Time Page (PHIETIM) lists, by pay period and leave report organization, all employees who are part of department time entry, and summarizes the time and leave that has been entered and/or submitted.

The time entry originator (Payroll Liaison) and their proxy have access to this page. You cannot access this information without the proper authority. Employee, salary, employee class, and organization security protect the information contained on this page.


!

A proxy has the same privileges as the originator *only if* the proxy has the same Time Entry security setup as that originator.

**NOTE:** If you viewed PHIETIM prior to selecting PHATIME, the information in the key block is the same on this page. Proceed to Page 27.

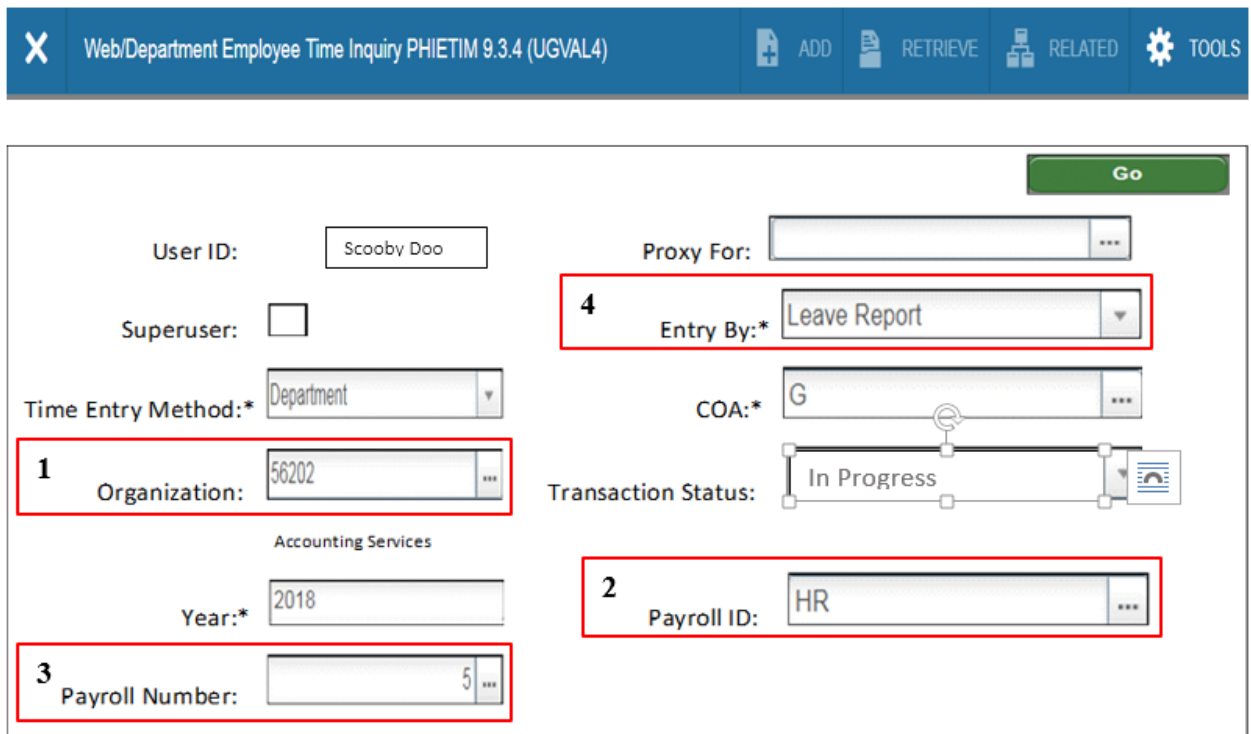
## KEY BLOCK

Use the Key block of PHJETIM to select the time sheet information that determines which employees display in the Employee section.

A different value in any of the fields can create different results. For example, if you do not see a display of the employees you want in the Employee Detail Listing section, it may be because you have not selected the correct options in the Key Block, you can  and reselect your options.

Use the Key block of PHJETIM to select the time sheet information that determines which employees display in the Employee section. All fields are required, except 'Proxy For'. A different value in any of the fields can create different results or no results.

The **User ID** of the person accessing this page is displayed in the top left corner. In order to access this page, the user must be defined. Display only. This would be the originator (Payroll Liaison). **This would be the individual who has logged into Banner. This is an auto completed field.**






1. **Organization** – The organization for which time sheet information is displayed. Only valid combinations of COA codes and organization codes are allowed since Banner Finance is installed. You can only view time records for Orgs where you have been granted security access. **[TAB]**

**Transaction Status** - The current status of the leave reports. The selection that you make in this field queries the remaining information on PHJETIM. Your first time accessing time sheets for this pay period, select 'Not Started' from the drop down menu. **[TAB]**

**Year** - The current payroll year. This information defaults into the system. You will need to change it on the 1<sup>st</sup> payroll of the new year. **[TAB]**




**2. Payroll ID** - The payroll ID identifies the three populations of employees at UNCG for the leave report. This field **MUST** be entered prior to entering the Payroll Number. Manually enter the value, then **[TAB]**:


-  HR – for departmental hourly, graduate hourly, work-study students and SHRA temporary employees
-  NE – for non-exempt SHRA employees
-  EX – exempt SHRA and all EHRA employees

**3. Payroll Number** – This is a 1 or 2 digit number that identifies the month being **paid**. (Example: Jan = 1, Feb = 2, Dec = 12, etc.) Pay period dates for recording Leave display based on the selected Payroll ID and will **NOT** match the calendar month in all cases. **[TAB]**

**!** For SHRA NE (non-exempt) employees, as Banner only recognizes a maximum of 31 days in a pay period, the Leave Period will be based on the SHRA Monthly Schedule published on the HR Website found at:  
<https://banner.uncg.edu/hr/hr-dates-and-deadlines/>

**4. Entry By** - Pull down list identifying type of time entry activity. This determines what information will be displayed on the remaining sections of PHJETIM. Values are:

-  Time Sheet (default)
-  **Leave Report** – **!** UNCG will always use **Leave Report**
-  Leave Request




Always select the middle option.  
Remember: ***You are the middleman***  
between payroll and the employee.

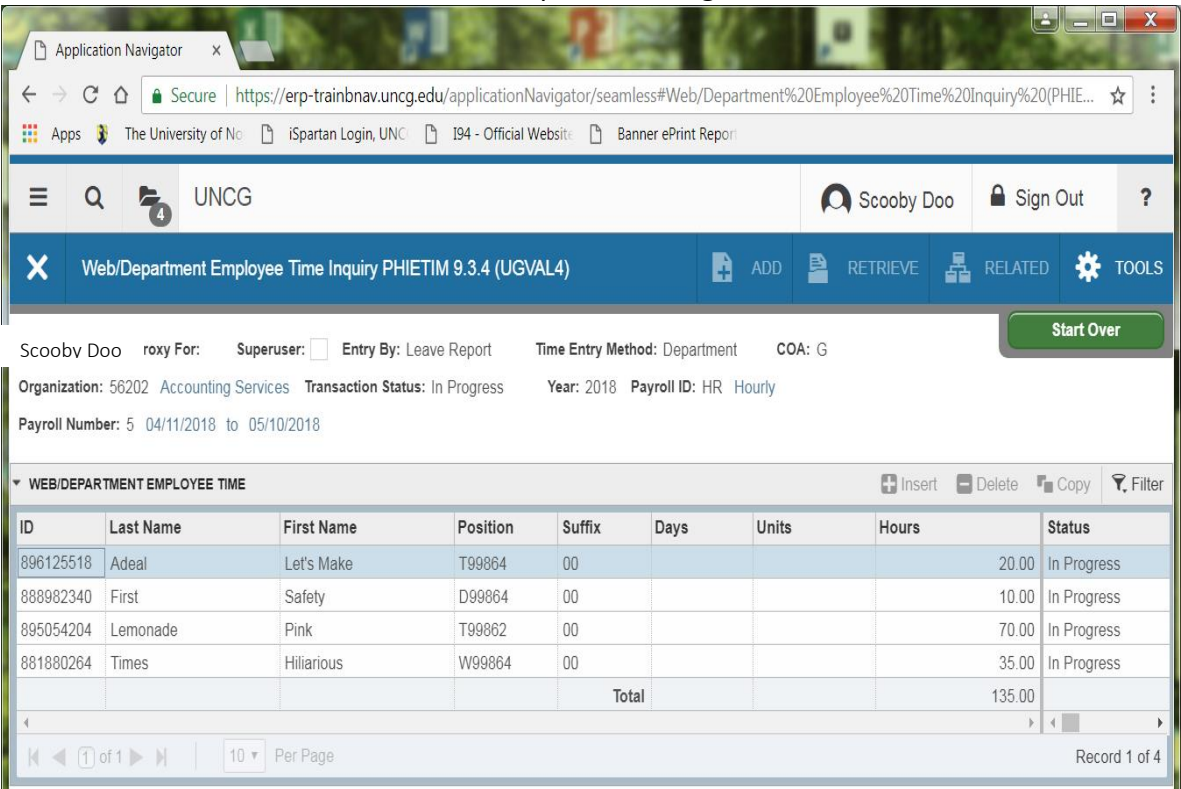
**Time Entry Method** - The type of time sheet or leave request. **This is a required field.** [System defaults to **Department**] **[TAB]**

- ✚ **All** - Retrieves timesheet information that has been entered through self-service, department or third party time entry, or retrieves leave request information that has been entered through self-service, department or third party – not used at UNCG
- ✚ **Department** - Retrieves decentralized timesheet/leave report/leave request information that has been entered on the Electronic Approvals of Time Entry Page (PHATIME).
- ✚ **Third Party** – not used at UNCG
- ✚ **Web** - not used at UNCG

**! UNCG will *always* use Department for [Time Entry Method].**  
**This selection defaults when you enter this page.**

**COA – ‘G’** - The chart of accounts used by the Banner Finance system

✚ Click the  button or press Alt+PageDown.



Scooby Doo roxy For: Superuser: ☐ Entry By: Leave Report Time Entry Method: Department COA: G

Organization: 56202 Accounting Services Transaction Status: In Progress Year: 2018 Payroll ID: HR Hourly

Payroll Number: 5 04/11/2018 to 05/10/2018

WEB/DEPARTMENT EMPLOYEE TIME

ID	Last Name	First Name	Position	Suffix	Days	Units	Hours	Status
896125518	Adeal	Let's Make	T99864	00			20.00	In Progress
888982340	First	Safety	D99864	00			10.00	In Progress
895054204	Lemonade	Pink	T99862	00			70.00	In Progress
881880264	Times	Hilliarious	W99864	00			35.00	In Progress
				Total			135.00	

Record 1 of 4

## **EMPLOYEE DETAIL LISTING BLOCK – All fields are display-only (cannot be edited)**

This block identifies the employees that meet the criteria listed in the Key block of PHATIME. **ID** - Employees are listed alphabetically by name with their ID.

**Last Name – First Name** Use the vertical scroll bar to the right to display other employees.

**Position & Suffix** - The employee's unique Position + Suffix associated with the Organization Field listed in the Key block defaults to this field.

When more than one job exists for an employee, use the vertical scroll bar to the right to display other positions.

**Days** – UNCG will not have information displayed in this field.

**Units** – UNCG will not have information displayed in this field.

**Hours** - The total hours entered per pay period for this employee. The department totals for all employees displayed on this page appear at the bottom. This is a SUMMARY TOTAL field of **ALL** hours, for **ALL** Earnings Codes, entered *per employee*.

**Status** - The transaction status of the individual employee's leave report.

The value that is displayed in the **Status** field in the Employee Detail Listing block is the same as the value selected for the **Status** field in the Key block, except when *All (Except Not Started)* is selected in the Key block. When this happens, the individual status displays in the Employee Detail Listing block.


**Time Sheet Organization** – This field displays the current organization for which you querying.

**Time Entry Method** – This field will always reflect Department.

Banner allows you to Export the information from PHJETIM to an excel spreadsheet as an audit trail.

(The information reflected here indicates time has been entered into PHATIME.)

Web/Department Employee Time Inquiry PHJETIM 9.3.4 (UGVAL4)										
TD/NORDAN Proxy For: Superuser: <input type="checkbox"/> Entry By: Leave Report Time Entry Method: Department COA: G Organization: 56202 Accounting Services Transaction Status: In Progress Year: 2018 Payroll ID: HR Hourly Payroll Number: 5 04/11/2018 to 05/10/2018										
WEB/DEPARTMENT EMPLOYEE TIME										
ID	Last Name	First Name	Position	Suffix	Days	Units	Hours	Status	Time Sheet Organization	Time
896125518	Adeal	Let's Make	T99864	00			178.00	In Progress	56202	Dep
888982340	First	Safety	D99864	00			60.00	In Progress	56202	Dep
895054204	Lemonade	Pink	T99862	00			130.00	In Progress	56202	Dep
881880264	Times	Hilarious	W99864	00			15.00	In Progress	56202	Dep
Total							383.00			

- select  from the window options
- under the **Actions** menu section, select 'Export'. Save as an Excel spreadsheet for reconciling your entries

Web/Department Employee Time Inquiry PHJETIM 9.3.4 (UGVAL4)										
TD/NORDAN Proxy For: Superuser: <input type="checkbox"/> Entry By: Leave Report Time Entry Method: Department COA: G Organization: 56202 Accounting Services Transaction Status: In Progress Year: 2018 Payroll ID: HR Hourly Payroll Number: 5 04/11/2018 to 05/10/2018										
WEB/DEPARTMENT EMPLOYEE TIME										
ID	Last Name	First Name	Position	Suffix	Days	Units	Hours	Status		

**ACTIONS**  
 Refresh F5  
 Export Shift+F1

## LATE CHANGES TO TIME/LEAVE RECORDS:

Once the monthly cut-off date has passed and payroll processing has begun, records are locked and further changes cannot be made. If changes must be made after that point, they must be submitted to Payroll on manual forms found on the Payroll Department's website: <https://payroll.uncg.edu/leave-management-forms/>

**CALL THE PAYROLL OFFICE BEFORE PROCEEDING!** To make corrections in BannerHR at this point, the entire payroll process must be stopped. The sooner the payroll department is informed, the better they are able to stop processing. Call first! Then send the appropriate forms.

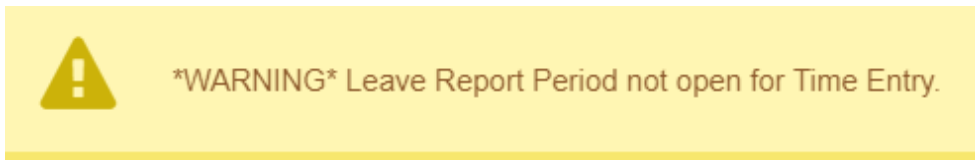
Manual Revisions to PHATIME Entries Form: use this form to correct entries that have already been put into Banner HR.

This includes time submitted for employees who separate prior to the end of the month, which need to be deleted. The associated timesheets for a separated employee need to be submitted to the appropriate Human Resources office so final adjustments to pay can be calculated.

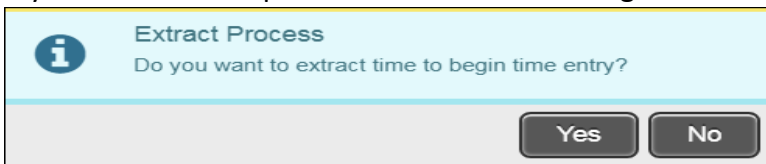
Manifests: use the Monthly, Temporary, Departmental or Work-Study Manifests to submit time that was not originally entered into Banner HR, but needs to be included in the current payroll.

## BANNER BALKS

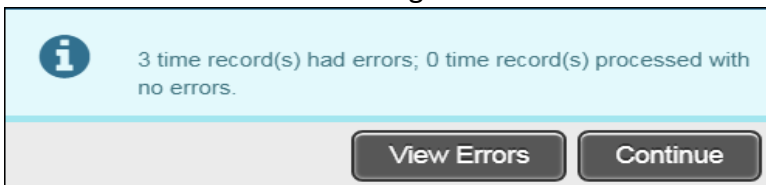
If you specify an incorrect Leave Number, Banner will show a windows message indicating the Leave Report Period is not open.



If you continue and press the 'Yes' button to begin time entry



You will receive an Error message window



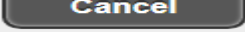
If the message displays error messages, if you click on View Errors or Continue, it will return you to the Key Block. The Transaction Status does not change from [Not Started] to [In Progress], so you in effect haven't started time entry. Correct the choices in your Key Block and try again. If making corrections to the key block does not fix the issue, please contact [payroll1@uncg.edu](mailto:payroll1@uncg.edu) for assistance. Errors **MUST** be corrected in order to continue with the time entry process.



When you enter the Leave Number and press Tab to proceed, Banner displays this entry box:

The screenshot shows the Banner ePrint Report interface. The main window is titled 'Electronic Approvals of Time Entry PHATIME 9.3.3 (UGVAL4)'. It contains several input fields: 'User ID' (Scooby Doo), 'Superuser' (checkbox), 'Time Entry Method' (Department), 'Organization' (56202), 'Year' (2018), 'Leave Number' (5), 'Proxy For' (dropdown), 'Entry by' (Leave Report), 'COA' (G), and 'Transaction Status' (Not Started). A 'Go' button is in the top right. A modal dialog box titled 'Time Entry Selection Criteria PHATIME 9.3.3 (UGVAL4)' is open in the center. It has fields for 'Begin' (04/11/2018), 'End' (05/10/2018), and 'Check' (05/01/2018). Below these is an 'Employee' section with 'ID' and 'Last Name' fields. 'OK' and 'Cancel' buttons are at the bottom right of the dialog. The background interface is dimmed.

You can enter an employee ID in this box, and proceed to extract the employee for which you entered their ID and enter their Time

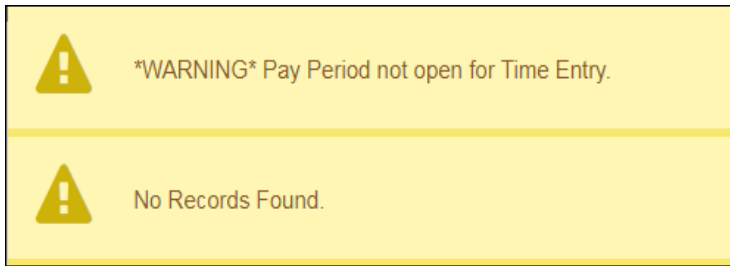
It is recommended you select  to proceed past this box as this will only extract the individual for which you entered their ID#. It is not recommended to extract one employee at a time.

---

If you forget to set the [**Entry By**] field to Leave Report, Banner defaults to 'Time Sheet'...

The screenshot shows the Banner ePrint Report interface with the 'Entry by' field set to 'Time Sheet'. A red box on the left contains the text 'UNCG uses 'Leave Report' ONLY'. The fields shown are: 'Proxy For' (dropdown), 'Entry by: \*' (Time Sheet), 'COA: \*' (G), 'Transaction Status: \*' (Not Started), and 'Payroll ID: HR' (dropdown) with 'Hourly' text to the right.

Banner will respond with the following window messages:



Select  and change the Entry By to 

---

## APPENDIX A – Employee Class Codes

CODE	ECLASS DESCRIPTION	LEAVE ID
E1	SAAO I 12 Mo Leave Earning	EX
E2	SAAO II 12 Month Leave Earning	EX
EA	EHRA 10 month Leave Earning	EX
EB	EHRA 11 month leave earning	EX
EC	EHRA Perm Part-time	EX
ED	EHRA 9 month leave earning	EX
EN	EHRA 9 month non-leave earning	EX
EP	EHRA 12 mo leave earning	EX
ER	Faculty Phased Retirees	EX
ET	EHRA Temporary (Not Faculty)	EX
FA	Temporary Academic Yr Faculty	EX
FC	Faculty 9 month Non Leave earn	EX
FE	Faculty 10 month non-leave ear	EX
FF	Faculty 11 month leave earning	EX
FG	Faculty 12 Mo Leave Earning	EX
FO	Other Temporary Faculty	EX
FP	Faculty Permanent Part-time	EX
FS	Temporary Semester Faculty	EX
GF	Graduate Flat Pay	EX
L1	12 Month Librarians; LeaveEarn	EX
RE	Retired (EHRA) Working	EX
RF	Retired (Faculty) Working	EX
SE	SHRA Exempt	EX
SS	Summer Session Employee	EX
UF	Undergraduate Flat Pay	EX
EZ	EHRA Non - Exempt Permanent	NE
SA	SHRA 10 Month Leave Earning	EX or NE
SB	SHRA 11 Month Leave Earning	EX or NE
SC	SHRA 9 Month Leave Earning	EX or NE
SD	SHRA Seasonal Part-time	EX or NE
SF	SHRA Temp Flat Pay	NE
SN	SHRA Non-Exempt	NE
SP	SHRA Perm PT	NE
EY	EHRA Temp Hourly	HR
GH	Graduate Hourly	HR
RW	Retired (SHRA) Working	HR
ST	SHRA Temp Hourly	HR
UH	Undergraduate Hourly	HR
WG	Graduate Work Study Students	HR
WS	Work Study Students	HR

## APPENDIX A – Employee Class Codes

CODE	ECLASS DESCRIPTION	LEAVE ID
AA	Affiliated Persons	None
AF	Adjunct (Faculty)	None
AJ	Adjunct (EHRA)	None
AR	Affil Research Part Non Paid	None
PH	Prehire Student (Used for I9)	None
RH	Retired Historical	None

! The dates displayed for EX (Exempt) and NE (Non-Exempt) employees are the same.

Banner does not recognize the 4 or 5 week periods for recording leave as defined on the SHRA Monthly Schedule located on the Human Resource Services website: <https://banner.uncg.edu/hr/hr-dates-and-deadlines/> .