

Overview: Time Entry and Security Setup

This document is an overview of **Time Entry and Security Setup** for unit-level Human Resources/Payroll Contact/Business Managers, the Unit Security Contacts (USC) and Superusers.

The overview is broken into five key concepts:

- I. **Timesheet Organization (TS-Org)**
- II. **Time Entry Method**
- III. **Time Entry Roles**
- IV. **Time Approval Routing Queues**
- V. **Time Entry and Approval Proxies**

I. TIMESHEET ORGANIZATION

Timesheet Organization (TS-Org) is an attribute assigned on the **Employee Jobs Form (NBAJOBS)** in **Banner** that facilitates the time approval and payroll process for employees within a specific department or organization. In most cases, the TS-Org will reflect either the employee's **Home Org** (home department) or a subset of the **Home Org**.

Position definitions

Human Resources/Payroll Contact/Business Manager:
Coordinates the approval routing security setup for a unit's human resources and payroll functions

Superuser: Changes or approves all time transactions either in Employee Self-Service or **PHATIME**

Unit Security Contact (USC): Initiates security access requests and changes

II. TIME ENTRY METHOD

There are three methods of employee time entry. The time entry method must be determined before time entry roles and approval routing queues are established.

1. **Employee Time Entry via Web** – This time entry method uses the web-based **Employee Self-Service** system for employees to report and submit their time for approval. **Employee Time Entry via Web** is the default time entry method on the **Employee Jobs Form (NBAJOBS)** in **Banner**. In the **HR Front End**, the choice appears as **W-Web**. It can be found in the **Job Detail** of the **Employee Record View (ERV)** along with the assigned timesheet organization (see *Figure 1*).

2. **Dept Time Entry with Approvals** – Units who choose this time entry method use paper timesheets. They are filled out by employees, reviewed by the supervisor and then submitted to one individual who enters the time for each employee directly into the **Electronic Approvals of Time Entry Form (PHATIME)** in **Banner**. Completed electronic timesheets are then submitted to the designated individual for approval. Units must specify that **Dept Time Entry with Approvals** is the preferred time entry method when submitting an **HR Front End** transaction to Human Resources for job additions or changes.



If your unit's preferred time entry method is **Dept Time Entry with Approvals** or **Payroll Time Entry** because your unit uses a third party time reporting tool, submit an **HR Front End** transaction to change the time entry method from **Employee Time Entry via Web** (i.e., **W-Web**) to the appropriate time entry method.

3. **Feeder System** – Some units may have a third party time reporting tool or clocking system (e.g., **Kronos**) that interfaces with **Banner**. Time entry roles, approval routing queues and corresponding security reside within the third party system and not in **Banner**. Units must specify that **Payroll Time Entry** is the preferred time entry method when submitting an **HR Front End** transaction to Human Resources for job additions or changes.

JOB DETAIL

DATES
 PERSONNEL DATE: 8/16/2016 EFFECTIVE DATE: 8/16/2016 LAST PAID DATE: 11/15/2016 JOB BEGIN DATE: 2/1/2006 JOB END DATE:

POSITION: C2*****00 **SUFFIX:** **POSITION CLASS:** NFCLA-***** **JOB TITLE:** ***** **JOB TYPE:** P - Primary

PAY ID: ***** **FACTOR:** **JOB FTE:** 1.000 **APPT %:** 100.0 **PAY RATE**
 HOURLY: ***** MONTHLY: ***** ANNUAL: ***** **JOB STATUS:** A - Active

JOB CHANGE REASON: SA018 - Salary Planner Upload **TIMESHEET**
COA: ORG: 9 374000 - OBFS - Univ Payroll & Benefits **TIME ENTRY METHOD:** W - Web **FLSA PRIMARY POSITION:**

JOB EMPLOYEE CLASS: ***** **LEAVE CATEGORY:** Y3 - 12/12 mth 2 FH SICK/SICN **ACCRUE LEAVE:** Y - Yes

SALARY
GROUP: 2017 **TABLE:** AA **GRADE:** UNDFD **STEP:** 0-0 **PROBATIONARY**
PROB PERIOD: **BEGIN DATE:** **END DATE:** **INCREASE MM/DD:** **ANNIV DATE:**

BUDGET PROFILE CODE: R - Recurring **BARGAINING UNIT:** NONE **SEARCH NUMBER:** **HOURS PER DAY:** 8.0 **HOURS PER PAY:** 173.33

Figure 1

III. TIME ENTRY ROLES

Time entry roles in *Banner* and *Employee Self-Service* are partly dependent upon the time entry method chosen by the unit: **Employee Time Entry via Web** or **Dept Time Entry with Approvals**. They may differ from the security profile titles in the *Security Application*. Explanations of each role are below:

1. **Employee Web Time Entry Originator:** This role is for employees who start, complete and submit Web timesheets for approval on a biweekly basis within units that have chosen **Employee Time Entry via the Web**. The security for the employee to enter the time in the *Employee Self-Service* application is automatically granted when the time entry method "Web" is chosen as the preferred Time Entry Method and the appropriate TS-Org is assigned in the Timesheet Organization field during the *HR Front End (HRFE)* transaction to add or change an employee's job record. This will be reflected in the *Banner Employee Jobs Form (NBAJOBS)*.

- The **Employee Web Time Entry Originator Time Entry** security profile does not exist in the *Security Application*.
- **Employee Web Time Entry Originator** is not included in the time approval routing queue defined in the *Routing Queue Rules Form (NTRRQUE)* in *Banner*.



The *Security Application* allows the USC to request only one **Web and/or Department Time Entry Approver** individual per TS-Org. However, multiple **Time Approvers** can be assigned to a TS-Org time approval routing queue in *NTRRQUE*. If a TS-Org has already been assigned a **Web and/or Department Time Entry Approver** in the *Security Application*, it is recommended that the USC requests **Time Entry Approver Proxy** profile for the additional **Time Approvers** so the original **Time Approver's** security access is not inadvertently removed.

2. **Department Originator:** The person who reviews paper timesheets, enters the information into the **Electronic Approvals of Time Entry Form (PHATIME)** in *Banner* and submits the electronic timesheets for approval.
 - The security profile for **Department Originator** is **Department Time Entry Originator**. It is located in the **Time Entry** increment of the *Security Application*.
 - **Department Originator** is not included in the time approval routing queue defined in *NTRRQUE*.
3. **Time Approver:** The person who reviews and approves timesheets submitted by the originator either in *Employee Self-Service* or *PHATIME*.
 - The **Web and/or Department Time Entry Approver** profile is located in the **Time Entry** increment of the *Security Application*.
 - At least one **Time Approver** must be included in the time approval routing queue defined in *NTRRQUE*.
4. **Superuser:** A person designated to change or approve all time transactions either in *Employee Self-Service* or *PHATIME*.
 - The **Web and/or Department Time Entry Superuser** profile is requested by the USC in the *Security Application* and is located in the **Time Entry** increment.
 - The **Superuser** is not included in the time approval routing queue defined in *NTRRQUE*.

5. **Acknowledger:** The person designated to review a timesheet before it is routed to the approver. They can add a comment to the timesheet but cannot edit the hours submitted or approve time. In addition, the **Acknowledger** action is not required for the approval of the timesheet.

- The USC can request either the **Department Time Entry Originator** or **Time Entry Originator Proxy** profile in the **Security Application** for an **Acknowledger**. Both are located in the **Time Entry** increment.
- The **Acknowledger** is the FYI role in a time approval routing queue defined in **NTRRQUE**.
- **Acknowledgers** can only review and add comments. They have no approval authority.

6. **Originator Proxy:** The person who can act on the behalf of the **Department Originator**.

- The **Time Entry Originator Proxy** profile is located in the Time Entry increment of the **Security Application**, and can be requested by the USC.
- The **Originator Proxy** is not included in the time approval routing queue defined in **NTRRQUE**.
- The **Originator Proxy** is set up by the **Department Originator** in the **Electronic Approval Proxy Rules Form (NTRPROX)** in **Banner** or in the **Web for Employee** module of **Employee Self-Service**.

7. **Approver Proxy:** A person who can act on the behalf of the **Time Approver**.

- The **Time Entry Approver Proxy** profile is requested by the USC in the **Security Application**.
- The **Approver Proxy** is set up by the **Time Approver** in **NTRPROX**.
- The **Approver Proxy** may appear as an additional Time Approver in the time approval routing queue defined in **NTRRQUE** but is not required.

IV. TIME APPROVAL ROUTING QUEUES

Simply being assigned a time entry approval security profile in the **Security Application** does not grant the ability to approve timesheets in **Banner** or **Employee Self-Service**. Time approval routing queues are a second level of security for the **Time Approver** and **Acknowledger** roles described above in the Time Entry Roles section.

A time approval routing queue is created for a specific timesheet organization. The time approval routing queue assigns one or more individuals the role of reviewing and/or approving timesheets that are tied to that TS-Org. Time approval routing queues are set up in **NTRRQUE** (see *Figure 2*).

Approver Sequence	Mandatory Approver	Approver Position	Current Incumbent	Approver Action
1	<input type="checkbox"/>	UA6953 RES ASST PROF	John Cook	Approve
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Figure 2



Based on new time entry and org security profile requests, AITS will create the time approval routing queue for the TS-Org in **NTRRQUE**.

The unit **Superuser** should review and make any necessary changes to the time approval routing queue prior to the time entry period.

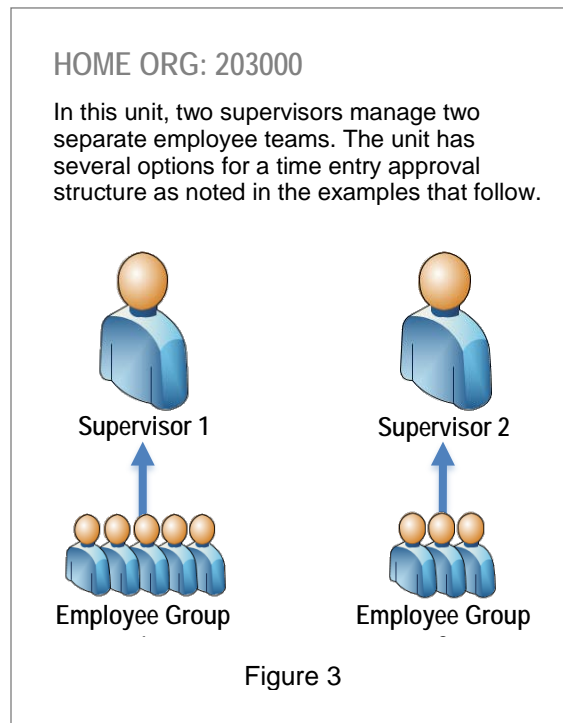
V. TIME ENTRY AND APPROVAL PROXIES

Originator Proxies and **Approver Proxies** are another security option for units that add some flexibility. Proxies are granted access to assume the role of the **Department Originator** or **Time Approver** through **NTRPROX** by the **Department Originator** or **Time Approver**.

Individuals who have been assigned an **Approver Proxy** role can be included in the time approval routing queue in **NTRRQUE**, but it is not required. Adding an **Approver Proxy** to the time approval routing queue changes their role from **Approver Proxy** to a **Time Approver** and will change the unit's time approval process. University of Illinois System business practice prefers time entry and approval proxies are not included in the routing queue defined in **NTRRQUE**.

Time Approval Routing Queue and Proxy Options

If a unit has multiple supervisors who are each responsible for reviewing and approving timesheets for a different set of employees (See *Figure 3*), the unit can assign time entry roles without creating additional TS-Orgs and time approval routing queues or the unit can design time approval routing queues that reflects the internal structure.



Option 1: Separate TS-Orgs (Recommended by UPB)

The unit separates the supervisors and their employees into two separate TS-Orgs (See Figure 4). Each supervisor is assigned the role of **Time Approver** for their TS-Org. When approving timesheets for their TS-Org, the supervisor will only see the timesheets for their employees.

In addition to the **Time Approver** roles, the unit also choose to have each supervisor take on the role of **Time Entry Approver Proxy** for the other supervisor. If an approver is unexpectedly out of the office, the other supervisor can access the other TS-Org timesheets as the proxy and approve the timesheets before the time entry deadline.

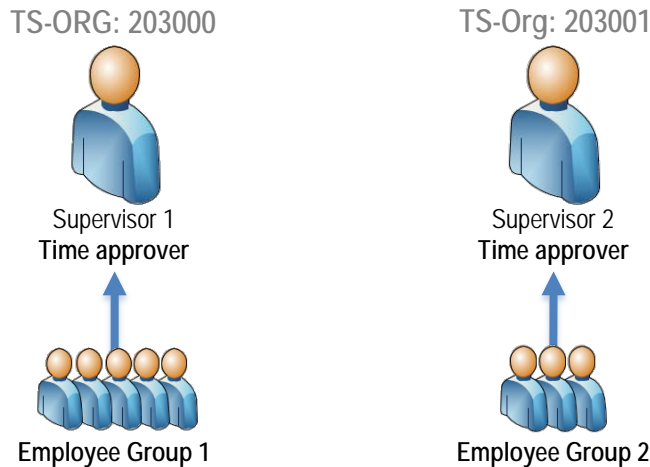


Figure 4

a. Routing Queue Rules Form (NTRRQUE)

Supervisor 1 is assigned the **Approver Action** of **Approve** and is designated as the **Time Approver** in the **NTRRQUE** for the first TS-Org (see Figure 4). Supervisor 2 is assigned the **Approver Action** of **Approve** and is designated as the **Time Approver** in **NTRRQUE** for the second TS-Org. (See Figure 5)

Approver Sequence	Mandatory Approver	Approver Position	Current Incumbent	Approver Action
1	<input type="checkbox"/>	U66662 PROF	Jim Hawkland	Approve
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Figure 5

b. Security Application

The **Web and/or Department Time Entry Approver** security profile is requested for Supervisor 1 for TS-Org 203000 through the **Security Application**. The same security profile is requested for Supervisor 2 for TS-Org 203001 (see Figure 6).

Even though Supervisor 1 and Supervisor 2 will be acting as each other's **Approver Proxy**, no additional time entry security profiles need to be requested. With the **Web and/or Department Time Entry Approver** security, the supervisors only need to be added to **NTRPROX**.

Profile Name	Authorizer Comments	Current Access	Action	Settings
Department Time Entry Originator		<input type="checkbox"/>	▼	
Web and/or Department Time Entry Approver		<input type="checkbox"/>	Add ▼	Time Entry Approver Organization*
Web and/or Department Time Entry Superuser		<input type="checkbox"/>	▼	
Time Entry Originator Proxy Proxy Maintenance Form		<input type="checkbox"/>	▼	
Time Entry Approver Proxy Proxy Maintenance Form		<input type="checkbox"/>	▼	

Buttons: Save, View/Submit Request

Figure 6

The screenshot shows a web application window titled "Electronic Approval Proxy Rules: NTRPROX 8.10 (BANUSER) (ZUIC)". The "User ID" field contains "JCOOK01". The interface has two tabs: "Electronic Approval" (selected) and "Other Modules".

Proxy Section:

Proxy ID	Admin ID	Activity Date
JHAWK01	Jim Hawkland	08-APR-2011

Proxy Modules Section:

Modules: TIME (selected), Time Entry

Figure 7

The screenshot shows the same web application window as Figure 7, but with "User ID" set to "JHAWK01".

Proxy Section:

Proxy ID	Admin ID	Activity Date
JCOOK01	John Cook	08-APR-2011

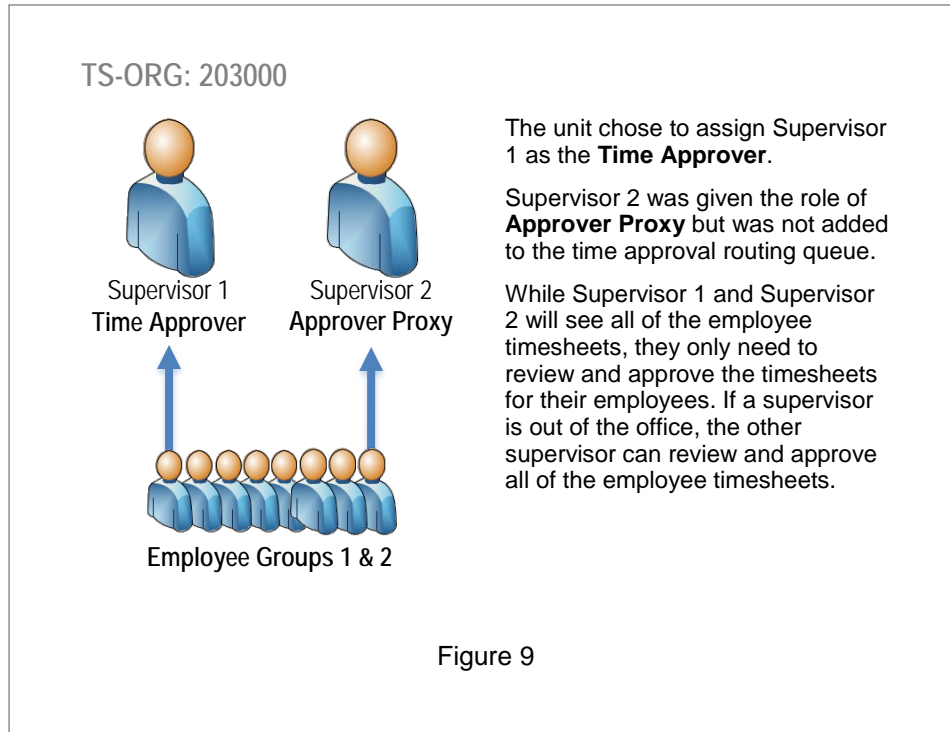
Proxy Modules Section:

Modules: TIME (selected), Time Entry

Figure 8

Option 2: One Time Approver & One Approver Proxy

The unit chooses to have one **Time Approver** and one **Approver Proxy**. The advantages of this structure are that only one TS-Org is required and that approvals are not sequential since Supervisor 2 is not added to the time approval routing queue in **NTRRQUE**. Each timesheet approval period, Supervisor 2 accesses either **PHATIME** in **Banner** or **Employee Self-Service** as a proxy for Supervisor 1 and approves his employees' timesheets while Supervisor 1 reviews and approves his employees' timesheets.



a. Routing Queue Rules Form (NTRRQUE)

Only Supervisor 1 is assigned a role within **NTRRQUE**. Because every time approval routing queue must have at least one **Time Approver**, Supervisor 1 is assigned the **Approver Action** of **Approve** (see Figure 10).

Approver Sequence	Mandatory Approver	Approver Position	Current Incumbent	Approver Action
1	<input type="checkbox"/>	UA6953 RES ASST PROF	John Cook	Approve
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Figure 10

b. Security Application

The **Web and/or Department Time Entry Approver** security profile is requested for Supervisor 1 through the **Security Application** (see *Figure 11*). Supervisor 2 has been assigned the **Security Application** profile of **Time Entry Approver Proxy** (see *Figure 12*).

Time Entry

Note:
 You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

Profile Name <small>Double Click on the profile name to see info about the profile</small>	Authorizer Comments	Current Access	Action	Settings <small>* = Required</small>
Department Time Entry Originator		<input type="checkbox"/>	▼	
Web and/or Department Time Entry Approver		<input type="checkbox"/>	Add ▼	Time Entry Approver Organization*
Web and/or Department Time Entry Superuser		<input type="checkbox"/>	▼	
Time Entry Originator Proxy Proxy Maintenance Form		<input type="checkbox"/>	▼	
Time Entry Approver Proxy Proxy Maintenance Form		<input type="checkbox"/>	▼	

Figure 11

Time Entry

Note:
 You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

Profile Name <small>Double Click on the profile name to see info about the profile</small>	Authorizer Comments	Current Access	Action	Settings <small>* = Required</small>
Department Time Entry Originator		<input type="checkbox"/>	▼	
Web and/or Department Time Entry Approver		<input type="checkbox"/>	▼	Time Entry Approver Organization*
Web and/or Department Time Entry Superuser		<input type="checkbox"/>	▼	
Time Entry Originator Proxy Proxy Maintenance Form		<input type="checkbox"/>	▼	
Time Entry Approver Proxy Proxy Maintenance Form		<input type="checkbox"/>	Add ▼	

Figure 12

c. Electronic Approval Proxy Rules Form (NTRPROX)

Supervisor 1 assigns Supervisor 2 as their **Approver Proxy** in **NTRPROX** (see Figure 13).

Electronic Approval Proxy Rules NTRPROX 8.10 (BANUSER) (2UIC)

User ID: JCOOK01

Electronic Approval | Other Modules

Proxy

Proxy ID	Admin ID	Activity Date
JHAWK01	Jim Hawkland	08-APR-2011

Proxy Modules

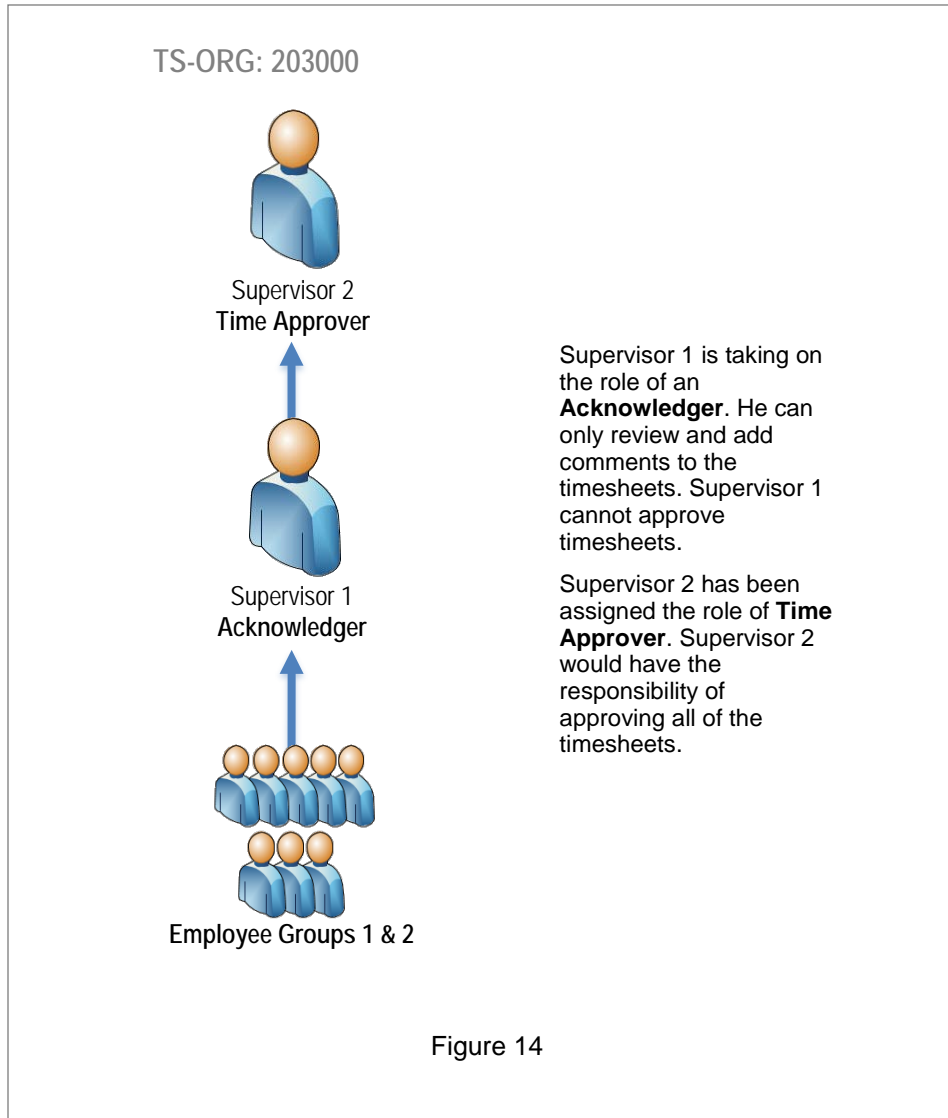
Modules

Modules	Time Entry
TIME	

Figure 13

Option 3: Time Approver & Acknowledger

The unit chooses to route timesheets from all of the employees to the Supervisor 1 and then Supervisor 2 (see Figure 14).



a. Routing Queue Rules Form (NTRRQUE)

The Supervisor 1 is assigned the **Approver Action** of *FYI* in order to fulfill the role of **Acknowledger** in *NTRRQUE*. Supervisor 2 is given the **Approver Action** of *Approve* (see Figure 15).

Approver Sequence	Mandatory Approver	Approver Position	Current Incumbent	Approver Action
1	<input type="checkbox"/>	UA6953 RES ASST PROF	John Cook	FYI
2	<input type="checkbox"/>	US6952 PROF	Jim Hawkland	Approve
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Figure 15

b. Security Application

In the **Security Application**, the **Time Entry Originator Proxy** or **Time Entry Approver Proxy** security profile should be requested for Supervisor 1 who will be acting as an **Acknowledger** (see Figure 16). The security profile of **Web and/or Department Time Approvals** should be requested for Supervisor 2, the **Time Approver** in the time approval routing queue (see Figure 17).

Time Entry

Note:
 You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

Profile Name <small>Double Click on the profile name to see info about the profile</small>	Authorizer Comments	Current Access	Action	Settings <small>* = Required</small>
Department Time Entry Originator		<input type="checkbox"/>	▼	
Web and/or Department Time Entry Approver		<input type="checkbox"/>	▼	Time Entry Approver Organization*
Web and/or Department Time Entry Superuser		<input type="checkbox"/>	▼	
Time Entry Originator Proxy Proxy Maintenance Form		<input type="checkbox"/>	▼	
Time Entry Approver Proxy Proxy Maintenance Form		<input type="checkbox"/>	Add ▼	

Save View/Submit Request

Figure 16

Time Entry

Note:
 You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

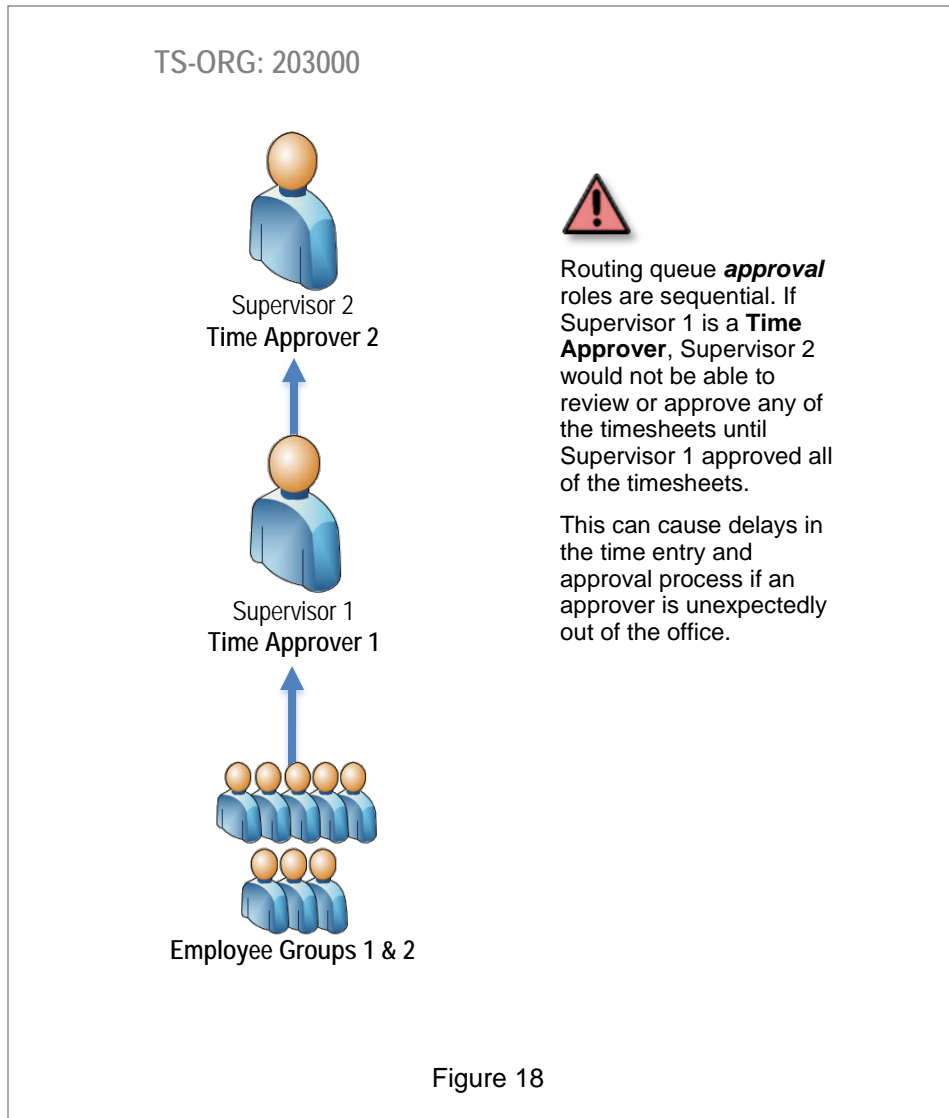
Profile Name <small>Double Click on the profile name to see info about the profile</small>	Authorizer Comments	Current Access	Action	Settings <small>* = Required</small>
Department Time Entry Originator		<input type="checkbox"/>	▼	
Web and/or Department Time Entry Approver		<input type="checkbox"/>	Add ▼	Time Entry Approver Organization*
Web and/or Department Time Entry Superuser		<input type="checkbox"/>	▼	
Time Entry Originator Proxy Proxy Maintenance Form		<input type="checkbox"/>	▼	
Time Entry Approver Proxy Proxy Maintenance Form		<input type="checkbox"/>	▼	

Save View/Submit Request

Figure 17

Option 4 – Multiple Approvers (Not Recommended by UPB)

The unit chooses to have both supervisors act as **Time Approvers** who will review and approve all timesheets.



a. Routing Queue Rules Form (NTRRQUE)

Supervisor 1 is assigned the **Approver Action** of **Approve** and is designated as the first **Time Approver** in **NTRRQUE**. Supervisor 2 becomes the second **Time Approver** when added to the routing queue with the **Approver Action** of **Approve** (see *Figure 19*).

Approver Sequence	Mandatory Approver	Approver Position	Current Incumbent	Approver Action
1	<input type="checkbox"/>	UA6953 RES ASST PROF	John Cook	Approve
2	<input type="checkbox"/>	U56852 PROF	Jim Hawkland	Approve
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Figure 19

b. Security Application

The **Web and/or Department Time Entry Approver** security profile is requested for Supervisor 1 through the **Security Application** (see *Figure 20*).

Supervisor 2 has been assigned the **Security Application** profile of **Time Entry Approver Proxy** (see *Figure 21*).

Time Entry

Note:
 You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

Profile Name <small>Double Click on the profile name to see info about the profile</small>	Authorizer Comments	Current Access	Action	Settings <small>* = Required</small>
Department Time Entry Originator		<input type="checkbox"/>	<input type="button" value="v"/>	
Web and/or Department Time Entry Approver		<input type="checkbox"/>	<input type="button" value="Add v"/>	Time Entry Approver Organization*
Web and/or Department Time Entry Superuser		<input type="checkbox"/>	<input type="button" value="v"/>	
Time Entry Originator Proxy Proxy Maintenance Form		<input type="checkbox"/>	<input type="button" value="v"/>	
Time Entry Approver Proxy Proxy Maintenance Form		<input type="checkbox"/>	<input type="button" value="v"/>	

Figure 20

Time Entry

Note:
 You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

Profile Name <small>Double Click on the profile name to see info about the profile</small>	Authorizer Comments	Current Access	Action	Settings <small>* = Required</small>
Department Time Entry Originator		<input type="checkbox"/>	<input type="button" value="v"/>	
Web and/or Department Time Entry Approver		<input type="checkbox"/>	<input type="button" value="v"/>	Time Entry Approver Organization*
Web and/or Department Time Entry Superuser		<input type="checkbox"/>	<input type="button" value="v"/>	
Time Entry Originator Proxy Proxy Maintenance Form		<input type="checkbox"/>	<input type="button" value="v"/>	
Time Entry Approver Proxy Proxy Maintenance Form		<input type="checkbox"/>	<input type="button" value="Add v"/>	

Figure 21

c. Electronic Approval Proxy Rules Form (NTRPROX)

Supervisor 1 assigns Supervisor 2 as their **Approver Proxy** in **NTRPROX** (see Figure 22).

Electronic Approval Proxy Rules NTRPROX 8.10 (BANUSER) (2/UC)

User ID: JCOOK01

Electronic Approval | Other Modules

Proxy

Proxy ID Admin ID Activity Date

Proxy ID	Admin ID	Activity Date
JHAWK01	Jim Hawkland	08-APR-2011

Proxy Modules

Modules

TIME	Time Entry

Figure 22