Banner Self-Service Time Sheet and Leave Report Approving

Action Items:
- Approve time for bi-weekly paid employees in Self-Service Banner
- Approve leave for monthly paid employees in Self-Service Banner

Approving Bi-weekly Time

1. Log into Self-Service Banner > on the Main Menu screen > click on the Employee Tab

2. Click on Time Sheet
3. The Selection Criteria will default to "Approve or Acknowledge Time" > Click on Select Button

**Time Reporting Selection**

Select a name from the pull-down list to act as a proxy or select the check box to act as a Supersuser. All Time Approvers should have at least one PROXY setup.

**PROXY SET UP**

Both monthly and biweekly timesheets are available to view under the timesheet drop down for the six months prior to April 1, 2006 Leave Report Implementation. The Leave Reports drop down will display only monthly pay periods effective April 1, 2006 and going forward.

**Selection Criteria**

- My Choice
- Access my Time Sheet: 
- Access my Leave Report: 
- Access my Leave Request: 
- Approve or Acknowledge Time: 
- Approve as Department: 
- Approve as Supersuser: 
- Act as Proxy: 
- Act as Supersuser: 

4. For Bi-weekly employees, you will be approving the actual timesheets. Select the appropriate Pay Period from the drop down box > Click on Select Button

**Approver Selection**

**IMPORTANT**: In order to access Leave Reports, the radio button selection in the "My Choice" column below will need to be switched from Time Sheet (default) to Leave Report. If you do not take this action before selecting the pay/leave period from the provided drop down menu and clicking on the "Select" button, you will retrieve prior period Time Sheets instead of Leave Reports.

**Time Sheet**

<table>
<thead>
<tr>
<th>Department and Description</th>
<th>My Choice</th>
<th>Pay Period</th>
</tr>
</thead>
</table>

**Sort Order**

- My Choice
- Sort employees' records by Status then by Name: *
- Sort employees' records by Name: 

5. Department Summary Page, top section of the summary provides an overview of Department, Proxy and Pay Period.

**Department Summary**

- **COA:** 1, Saint Louis University
- **Department:** D339, Human Resource Information Systems
- **Pay Period:** May 08, 2016 to May 21, 2016
- **Act as Proxy:** Not Applicable
- **APPROVAL DEADLINE ONLY:** Closed as of May 24, 2016.
6. The timesheets for each employee is listed by **STATUS** if the Pay Period Time Entry Status is still **OPEN**

**Status Types:**
Completed, Approved, Pending, In Progress, Not Started, Returned for Correction, Error

---

7. **Pay Event Transactions** section indicates various totals for the timesheets listed in the time approver’s queue

8. To review timesheet, click on **Change Time Record** (on the right side of screen) which will take you to the Time and Leave Reporting screen
9. You will select the day or earnings code combination to review each time in and time out entry.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular-hours</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Vacation</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Sick</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Sick-Caregiver Leave</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Holiday Pay</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Holiday Worked(Overtime)</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Holiday/Inclement Time</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Unpaid Leave</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>PMRA-Vacation</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>PMRA-Sick</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>PMRA-Sick-Caregiver</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>PMRA-Regular</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Bereavement-Leave</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. If you would prefer, you can select on the Preview button for a more efficient view of the timesheet.

11. Here the time approver will want to review the time entry for regular hours and all other reporting (i.e. vacation, sick, FMLA, military leave, bereavement, jury duty, shift differentials and holiday reporting).
12. If you would like to add a comment, click on the Add Comment button.

13. If the approver chooses to make the comment confidential, it will only be viewable to the employee and approver. The approver would need to select the Confidential Indicator box and Save button.

14. If entries are correct, then you will want to click on the Approve button and go onto next employee.

15. If you need to make a change, click on the Change Record button and this will take you back to the time and leave reporting screen.
16. Select a record by clicking on the **displayed hours for the date and earnings code** to be changed.

17. This will bring up the Time In and Out screen for the date and earnings code selected. The approver can type over the times originally entered by the employee.
18. Once the timesheet has been reviewed, changes made and comments added (if applicable), the timesheet is ready to approve. Click on the Approve box.

19. After successfully completed this, you will receive the message “The time sheet was approved successfully” at the top of the screen.

20. Click Previous Menu to return to the Department Summary to proceed with the next Pending Employee.

21. Once all Pending employee timesheets have been browsed, it will automatically take you to the In Progress, then In Error timesheets. If all other timesheets have been approved then you may exit banner.

NOTE: if the actual due date and time indicated on timesheet has passed and you have employees with In Progress timesheets then you will need to take action on their behalf to ensure processing of their timesheet for payment. Access Department Summary screen, go to In Progress timesheets (if there are any), and click on employee name and when the employee detail screen is up click on the Submit button. This will move the timesheet into a Pending status. If the timesheet is complete you will click on the Approve box. If the timesheet is not complete then make the correct changes to complete it and then click on the Approve box.
Approving Monthly Time

1. Log into Self-Service Banner > on the Main Menu screen > click on the Employee Tab

2. The Selection Criteria will default to “Approve or Acknowledge Time” > Click on Select Button
3. For Monthly employees, you will be approving their leave (not actual time). Since the screen defaults the radio button to the timesheet My Choice column, be sure to select the My Choice button for Leave Reporting. Select the appropriate **Pay Period** from the drop down box > Click on **Select Button**

   **Approver Selection**
   
   (220x130) In order to access Leave Reports, the radio button selected in the "My Choice" column below will need to be selected from Time Sheet (default) to Leave Report. If you do not take this action before selecting the pay/leave period from the provided drop down menu and clicking on the "Select" button, you will retrieve prior period Time Sheets instead of Leave Reports.

   **Time Sheet**
   
   - **Department and Description**
   - **My Choice Pay Period**
   - **Select**

   **Leave Report**
   
   - **Department and Description**
   - **My Choice Leave Period**
   - **Select**

   **Sort Order**
   
   1. Sort employees' records by Status then by Name.
   2. Sort employees' records by Name.
   
   **Select**

4. Department Summary Page, top section of the summary provides an overview of **Department, Proxy and Leave Period**.

   **Department Summary**
   
   - **COA:** 1, Saint Louis University
   - **Department:** D339, Human Resource Information Systems
   - **Start Date:** Jul 01, 2016 to Jul 30, 2016
   - **Act as Proxy:** Not Applicable
   
   ![Department Summary](image)

   **Available Options:**
   
   - **Change Selection** - allows the Approver to return to the Approver Selection Screen to select a different department
   
   - **Select All, Approve or FYI** - allows the Approver to select all Pending timesheets at the same time. This does not approve all of them unless the Save box is checked after this step
   
   - **Reset** - removes the checkmarks that are created when selecting the Select All, Approve or FYI box
   
   - **Save** - will save all options and approve all pending timesheets that have been selected if the “Select All, Approve or FYI” option was identified
5. The leave reports for each employee is listed by **STATUS** if the Pay Period Time Entry Status is still **OPEN**

**Status Types:**
Completed, Approved, Pending, In Progress, Not Started, Returned for Correction, Error

6. **Pay Event Transactions** section indicates various totals for the leave reports listed in the time approver’s queue

7. To review leave report, click on **Change Time Record** (on the right side of screen) which will take you to the Time and Leave Reporting screen
8. You will select the day or earnings code combination to review each time in and time out entry.

9. If you would prefer, you can select on the Preview button for a more efficient view of the leave report.

10. Here the time approver will want to review the time entry for regular hours and all other reporting (i.e. vacation, sick, FMLA, military leave, bereavement, jury duty, Holiday Bank and Holiday used). The time approver will not only see daily reported absences but also see the employees current available leave hours.
11. If you would like to add a comment, click on the Add Comment button

12. If the approver chooses to make the comment confidential, it will only be viewable to the employee and approver. The approver would need to select the **Confidential Indicator** box and **Save** button

13. If entries are correct, then you will want to click on the **Approve** box and go onto next employee.
Banner Self-Service Time Sheet and Leave Report Approving

14. If you need to make a change, click on the **Change Record** button and this will take you back to the time and leave reporting screen.

15. Select a record by clicking on the **displayed hours for the date and earnings code** to be changed.

16. The approver can type over the hours to change them. If the hours should not have been entered then enter 0.

   To go back and change previous weeks, click on **Next** button. This will allow you to find the correct week and date that needs to be changed.
17. Once all of the days/weeks have been reviewed, click on the **Previous Menu** button.

18. Once the leave report has been reviewed, changes made and comments added (if applicable), the leave report is ready to approve. Click on the Approve box.

19. After successfully completed this, you will receive the message “The time sheet was approved successfully” at the top of the screen.
20. After approving leave report, click on **Next** button (bottom of screen) to proceed with the next Pending Employee.

21. Once all Pending employee leave reports have been browsed, it will automatically take you to the In Progress, then In Error leave reports.

*Note: If any of the available balance columns goes to a negative number after the approval of the leave report, then those hours will be docked on the next paycheck to the employee. If the employee leaves employment prior to the recovery of the negative hours, then the department will be contacted with instructions on how to make the recovery.*

22. When you have approved your last leave record, and you are on the Department Summary screen, you may exit banner.

**Please feel free to contact payroll@list.slu.edu with additional questions**