The College of William & Mary

PROJECT MAST

Mastering Administrative Systems & Technologies

Human Resources and Payroll

Banner Employee Self Service
Time Sheet Approver and Proxy Guide

January 2006
Release 1.0

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Section 1: Getting Started

Overview

This section explains how to log in to Employee Self Service and where to get help in using ESS.

Objectives

After completing this section, you will be able to:

- Log in to ESS
- Locate online resources

Banner Employee Self Service Log In

Log in to my.wm.edu portal

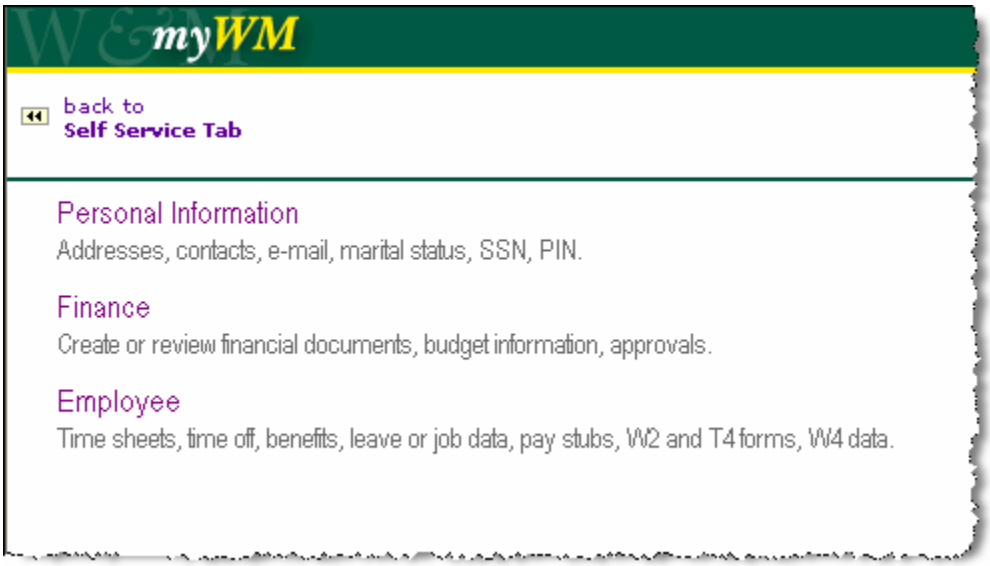
1. Open Internet Explorer (preferred browser for all Sungard SCT Banner products.)
2. Navigate to http://my.wm.edu.

3. Enter your WM User ID and Password.
   a. If you do not remember your WM User ID or password information, please call the TSC at 757-221-4357 for assistance.

4. Click **Login**.

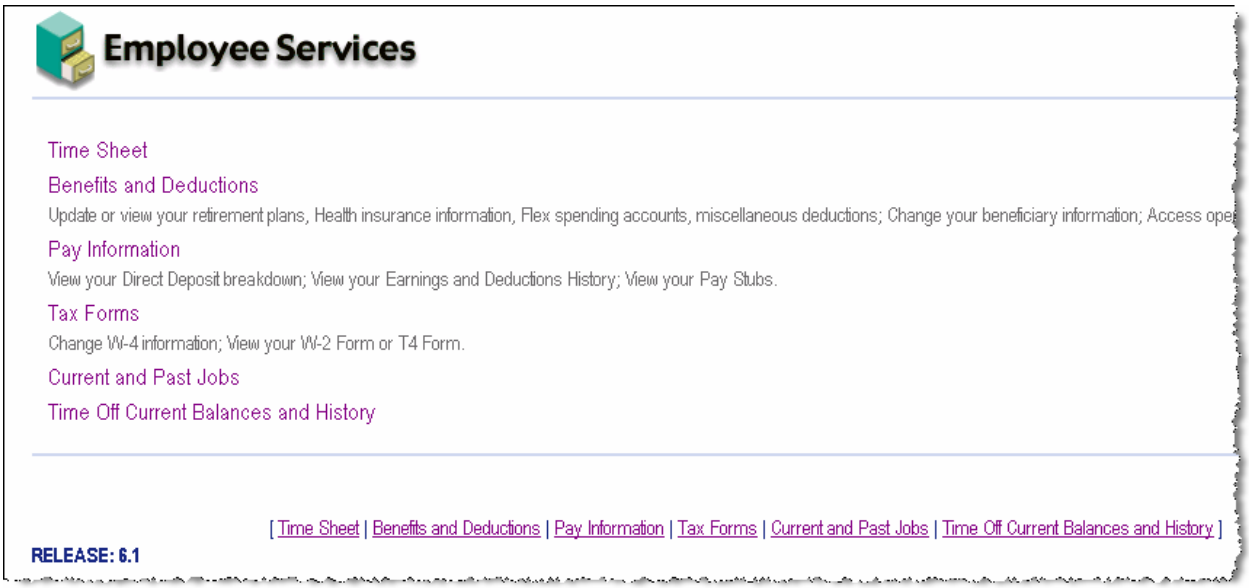
Access Employee Self Service

1. Select the **Self Service** tab.
2. Click **Banner Self Service**.
3. Click the **Employee** link.



Employee Self Service Main Menu

This is the main menu for Banner Human Resources Employee Services



Return to the Self Services menu by clicking **back to Self Service tab** in the upper left hand corner.

About this Guide

The purpose of this guide is to introduce the Banner Employee Self Service Time Approval tool and give instructions on how to approve time worked or leave taken by each employee who reports to you. It is not meant to explain any Payroll or Human Resources policies and/or procedures.

Getting Help

1. If you have employment, benefits, or payroll questions, please visit the Human Resources and/or Payroll web pages for a list of all William & Mary policies and procedures concerning your pay and benefits at http://www.wm.edu/hr

2. If you still have questions concerning HR or Payroll, please contact the Human Resources office at 757-221-3169 or the Payroll office at 757-221-2824.

3. Please contact the Banner Assistance Network for questions relating to the use of Banner and the Employee Self Service module by email to banner@wm.edu or call 757-221-BANN (2266).

4. The ESS Users Guide, this guide, and quick reference guides can be found at www.wm.edu/ess.

Section 2: Approving Time Sheets

Overview

This section explains how to locate your employees' time sheets, approve an employee's time sheet, defines the key terms, and demonstrates the navigation tools you will need to get started.

Objectives

After completing this section, you will be able to:

- Locate your employee's time sheet in ESS
- Review an employee's time sheet
- Add any comments to the time sheet record
- Approve an employee's time sheet

Approving Time

The College of William and Mary as well as the Virginia Institute of Marine Sciences use two different pay periods based on employee classification as shown in the chart below.

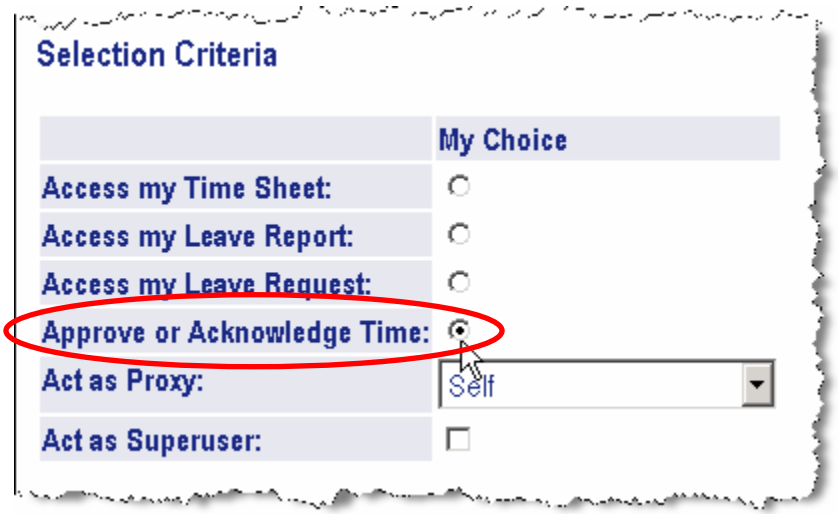
Time Periods: 10th – 24th and 25th – 9th	
AP Faculty Instructional Faculty Classified – Exempt Instructional 12 mo. Faculty	Only submit a time sheet for leave taken. Time sheet must be approved.
Non-Exempt	Always submit a time sheet for all hours worked and leave taken. Time sheet must be approved.
Time Periods: 1st – 15th and 16th – 31st	
Hourly (including Student Hourly)	Always submits a time sheet. Time sheet must be approved.

If you supervise AP Faculty/Classified employees and Hourly employees you will need to approve time sheets in EACH pay period.

Approve a Single Time Sheet

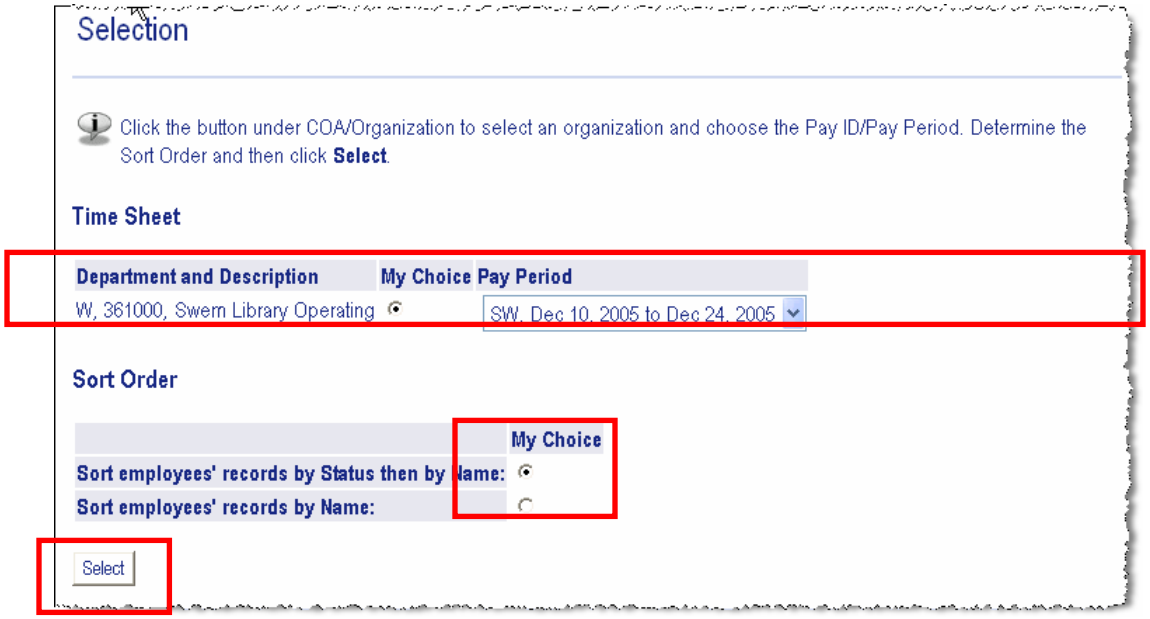
As an Approver/Proxy, you are responsible for approving time submitted by each employee reporting to you. You will now be able to approve time at any time (23/7) using the new Approval process through Employee Self Service.

1. Complete Employee Self Service Login.
2. Click on **Time Sheet** from the ESS menu.
3. Select **Approve or Acknowledge Time**.
4. Click **Select.**



5. By default the department(s) that you are approving will appear.
   a. Select the department you wish to approve and the correct pay period from the drop down list. You must approve one department at a time.

NOTE: The Pay Period date is preceded by SW, HW, SV, or HV. S represents Salaried; H represents Hourly; W represents William & Mary; and V represents VIMS.



   b. Select the **Sort Order** for employees' records.

NOTE: The *Sort employees' records by Status then by Name* option should be selected. Time sheets will be ordered by status: Not Started, In Progress, Pending, and Approved.

   c. Click **Select**, the Time Sheet Summary page displays.

6. The summary lists each status and corresponding employees' time sheets.

NOTE: You may see employees listed in the Not Started queue that do not report to you. This is because the sort is also based on the Department/Organization. An Organization covers many areas and may have many approvers.

You will need to pay attention to employees that report to you. You will also need to recognize if the employee is Exempt, Non-Exempt or Hourly and recognize who needs to submit a time sheet each pay period.

a. Take special notice of the Pay Period Time Entry Status as the time sheet must be submitted **and approved** by that specific date and time.

COA:	W, The College of William and Mary
Department:	361000, Swem Library Operating
Pay Period:	Dec 10, 2005 to Dec 24, 2005
Act as Proxy:	Not Applicable
Pay Period Time Entry Status:	Open until Jan 31, 2006, 12:00 P.M.

7. Scroll through all the statuses to view whose time sheet is ready for approval, in progress or not started.

Returned for Correction

ID	Name and Position	Total Hours	Total Units	Other Information
930292240	Jessica M Smith 00602W - 00	8.00	.00	

Not Started

ID	Name and Position	Other Information

NOTE: You may view time sheets for your employees if the time sheet status is Approved, Pending, Returned for Correction or In Progress only.

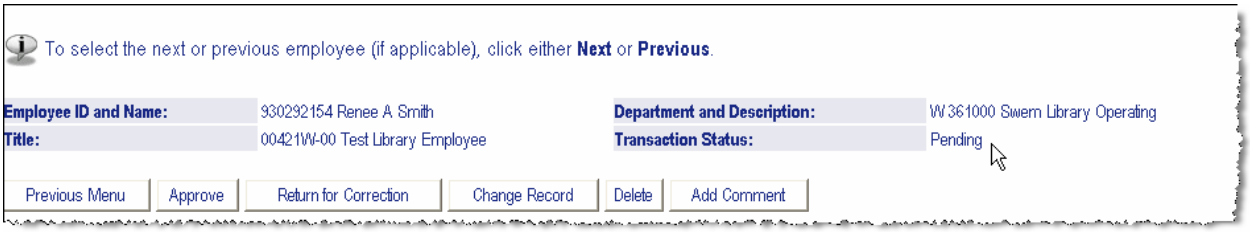
8. To view an individual time sheet, click on the name of the employee you will be approving. The Employee Detailed Information Page is displayed.

   a. If the you need to approved a time sheet and it has a status of "Not Started" or "In Progress", you must contact the **employee**. Only the employee can complete and submit the time sheet.

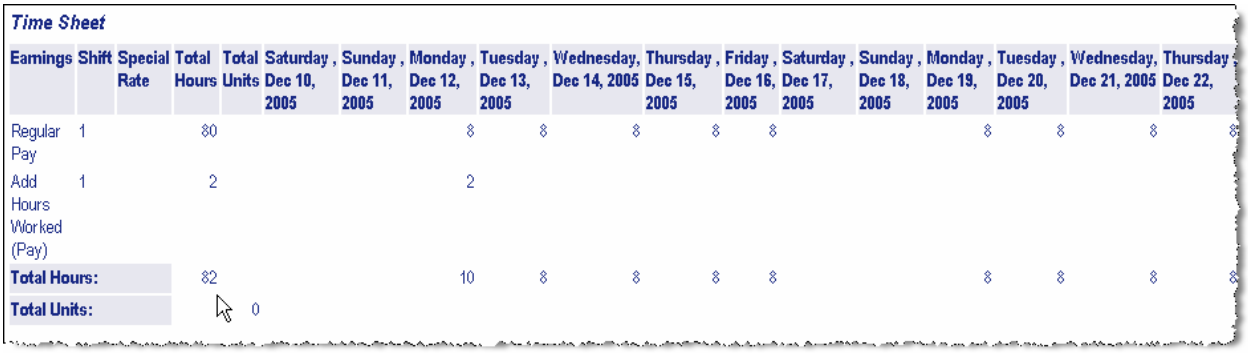
Pending

ID	Name and Position	Required Action	Total Hours	Total Units	Queue Status	Approve or FYI	Return for Correction	Other Information
930292154	Renee A Smith 00421W - 00	Approve	82.00	.00		☐	☐	Change Time Record

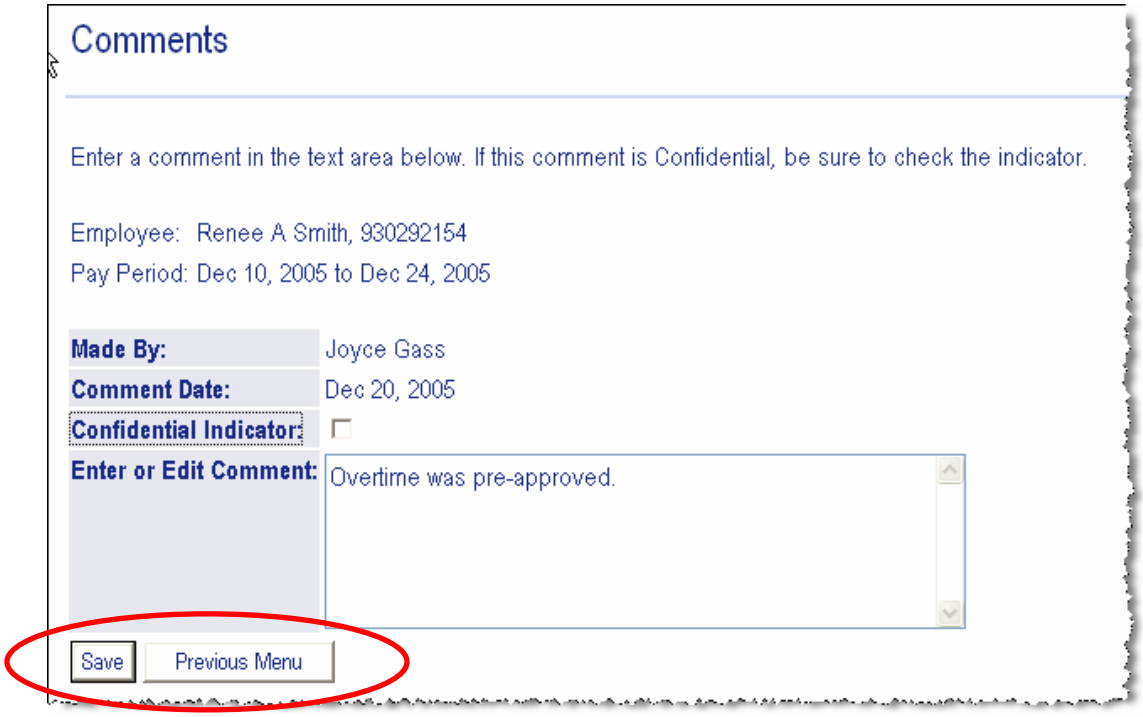
9. For each employee, verify the following information is correct:
   a. Employee ID and Name
   b. Title (including Position Number)
   c. Department and Description
   d. Transaction Status – must read "Pending". (If not, you must contact the employee to submit his/her time.)



10. Verify their hours worked.



11. If you need to communicate to the employee or payroll, click the **Add Comments** button.



12. Enter comments.
13. Only use the **Confidential Indicator** if you do NOT want the employee to see the comment. Only you or your proxy and Payroll may view a confidential comment.
14. Click **Save**.
15. Click **Previous Menu** to return to the Time Sheet menu.
16. If you approve the time sheet, click the **Approve** button.

17. If you approved the time sheet, the screen will display a confirmation message as shown below:

This will place the time sheet in the Approved disposition. Payroll can now process this time sheet.

18. Select **Next** or **Previous** to navigate through each employee's time sheet.
19. Select **Previous Menu** to return to the Department Summary Page when you come to the end of the list of time sheets.

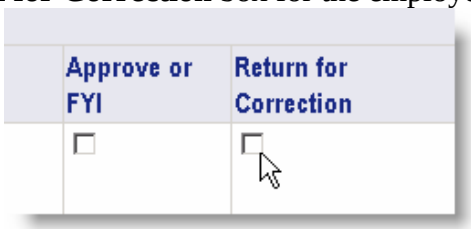
20. From this page you can select another department or exit the system.

Act on the Time Sheets as a Group by Status

1. Scroll through the time sheet records to sight check for accuracy.
2. Click **Select All**, **Approve or FYI**.

   a. A check will appear in the box under **Approve or FYI** for all employee records listed.

3. If any time sheets need to be returned for correction, you must <u>uncheck</u> the **Approve or FYI** box and <u>check</u> the **Return for Correction** box for the employee record that will be returned.



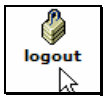
4. Click **Save** to complete the Approval process.

5. When the process is complete, a message is displayed (at the bottom of the Summary page) similar to:

   6 records have been Approved/Acknowledged.
   2 records have been Returned for Correction.

6. If you have another Organization to approve, click on the **Select New Department** button.

7. From this page you can select another department or exit the system by clicking the logout icon in the upper right corner of screen.



Section 3: Making Time Sheet Corrections

Overview

This section explains how to make changes to your employees' time sheets if time worked or leave taken has not been reported correctly.

Objectives

After completing this section, you will be able to:

- Return a time electronically to an employee for correction
- Change a time sheet on behalf of the employee

Time Sheet Corrections

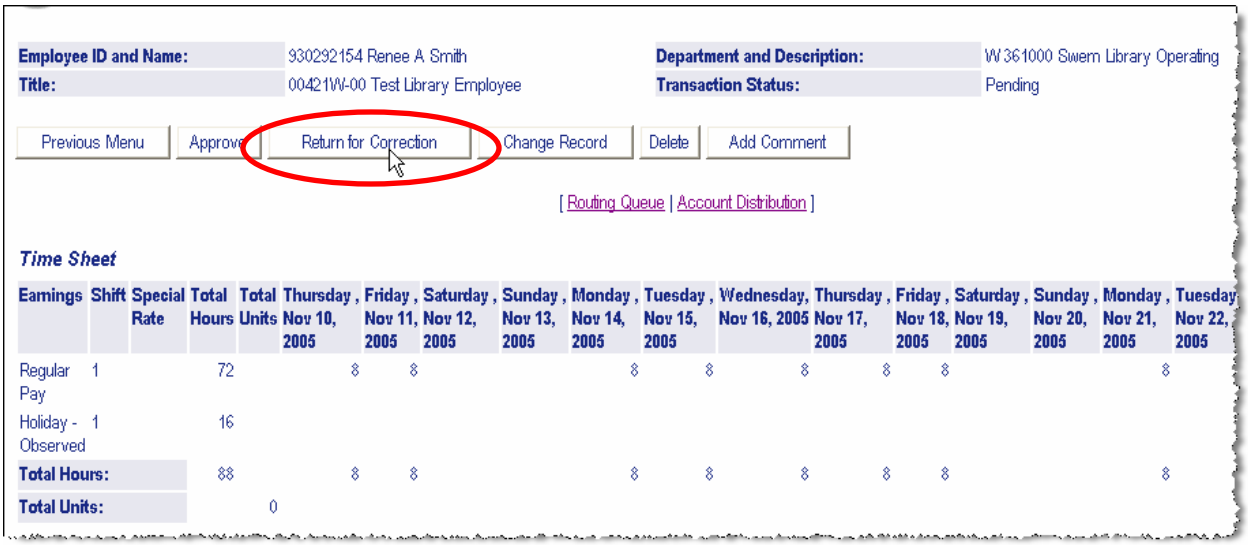
There are two ways in which changes can be made to an employee's time sheet.

- You may return the time sheet to the employee electronically using the **Return for Correction** feature.
- You may change the time sheet yourself using the **Change Time Record** feature but only with permission from the employee.

Return for Correction

This feature allows you to return a time sheet electronically to the employee. It is recommended that you contact the employee (voice/email) to advise them the time sheet is being returned. The employee will need to update the time sheet and resubmit it for approval – all before the Submit By Date.

1. Select the employee's time sheet.
2. Review the hours reported and/or leave taken.
3. If a correction needs to be made, review the proposed change with the employee. Let the employee know you'll be sending the time sheet back electronically.



Employee ID and Name:	930292154 Renee A Smith	**Department and Description:**	W 361000 Swem Library Operating
Title:	00421W-00 Test Library Employee	**Transaction Status:**	Pending

Previous Menu | Approve | Return for Correction | Change Record | Delete | Add Comment

[Routing Queue | Account Distribution]

Time Sheet

Earnings	Shift	Special Rate	Total Hours	Total Units	Thursday , Nov 10, 2005	Friday , Nov 11, 2005	Saturday , Nov 12, 2005	Sunday , Nov 13, 2005	Monday , Nov 14, 2005	Tuesday , Nov 15, 2005	Wednesday, Nov 16, 2005	Thursday , Nov 17, 2005	Friday , Nov 18, 2005	Saturday , Nov 19, 2005	Sunday , Nov 20, 2005	Monday , Nov 21, 2005	Tuesday Nov 22, 2005
Regular Pay	1		72		8	8			8	8	8	8	8			8	
Holiday - Observed	1		16														
Total Hours:			88		8	8			8	8	8	8	8			8	
Total Units:				0													

4. If you'd like to note the proposed change, add a **Comment** before clicking Return for Correction.
5. Click **Return for Correction** to send the time sheet back to the employee.

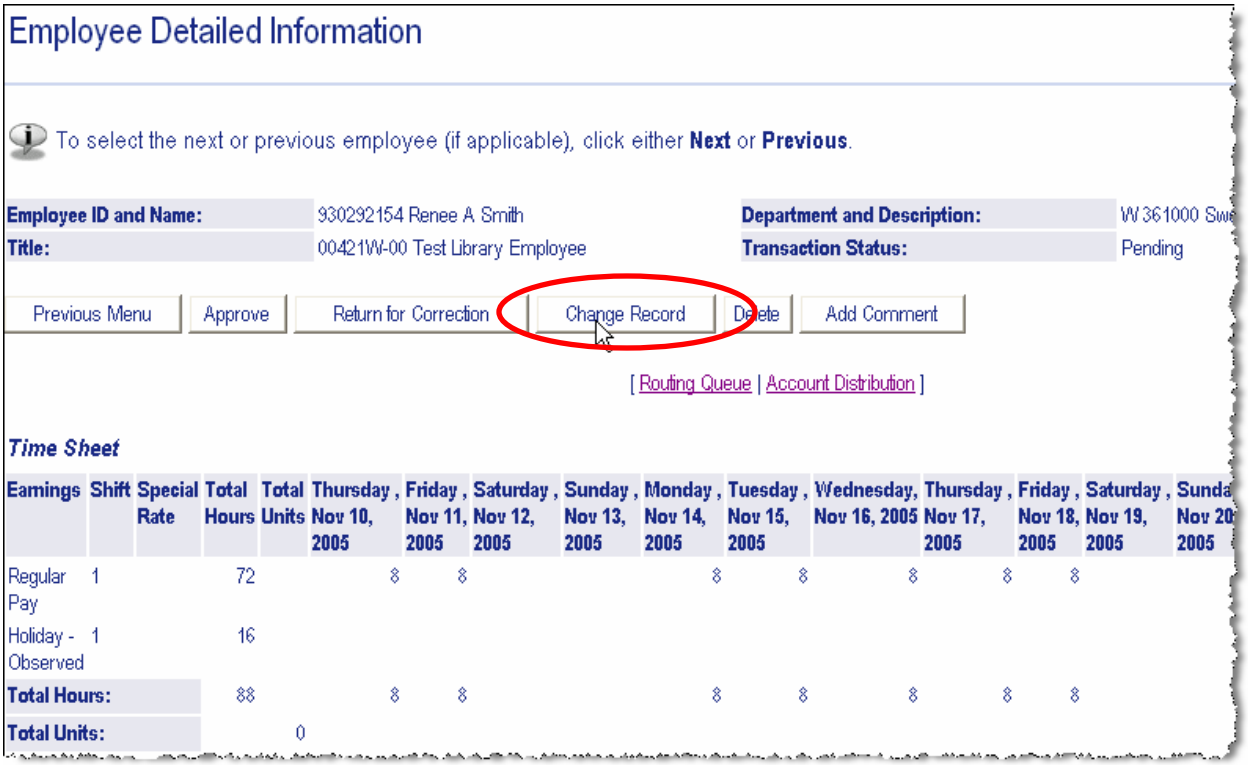
NOTE: There is NO automatic notification to the employee. They must log in to ESS and view their time sheet to know it has been returned unless you let them know.

The time sheet is returned to the employee. On the Time Sheet Summary screen the time sheet is now listed under the status of *Returned for Correction.*

6. Once the employee records the change and re-submits it for approval you will need to review it and approve it.

Change Record

As an approver you may change the employee's time sheet (as long as it is in a Pending status). You must also have permission from the employee to change the time sheet. Remember, this time sheet is the legal record of time worked or leave taken.



1. Click **Change Record** on the Employee Detailed Information screen or **Change Time Record** on the Time Sheet Summary screen.
2. Choose the desired Date and Earning type to edit
    1. Click the corresponding **Enter Hours** link to enter new hours
    2. Or, click on a number of hours to change them.

3. To **remove hours** for a certain date and earning type,
    1. Highlight/select the number of hours
    2. Click **BACKSPACE** to completely remove the value.
4. Click **Approve** to approve the time change.
5. Click **Previous Menu** to return to the Time Sheet Summary screen.

Reminders

- The Approver <u>must let the employee know</u> when a time sheet is returned for correction. Speak directly with the employee or send him/her a brief e-mail.

- The primary Approver or the Proxy Approver <u>must verify all hours</u> and ensure any necessary corrections are made prior to approving time for Payroll.

Section 4: Designating a Proxy

Overview

This section explains how to set up a proxy to approve time sheets on your behalf.

Objectives

After completing this section, you will be able to:

- Add and remove a proxy

Setting Up a Proxy

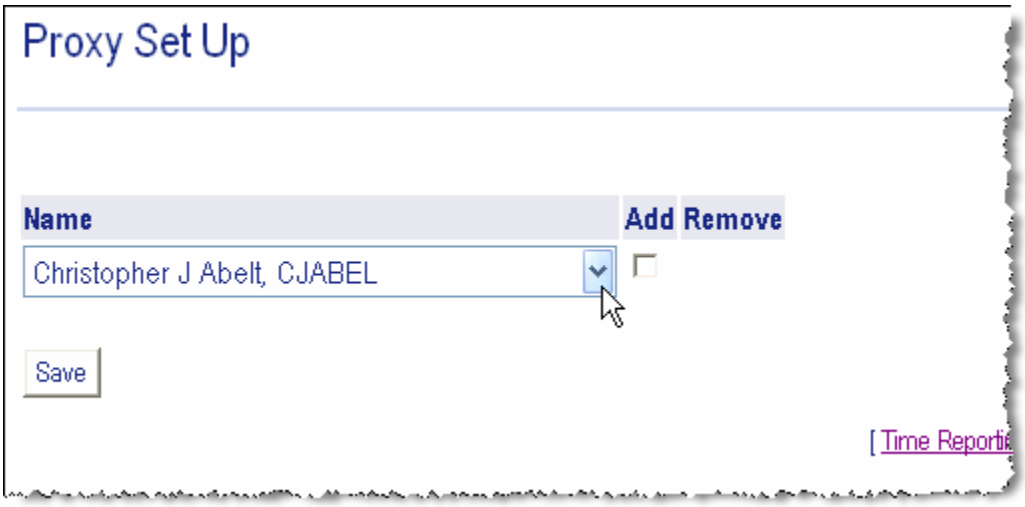
There may be times when you are unavailable to approve time. Approvers must set up a Proxy to act in their behalf and to approve the time sheets assigned. You should set up one or more proxies in advance.

- A proxy assumes your approval power.
- A proxy can only see the employee's time sheet and reported hours. Neither your proxy nor you can see any other information about the employee.
- A proxy should ONLY approve time when requested to do so by you.
- An employee can be made a proxy for more than one approver.

Proxy Set Up

1. Click **Proxy Set Up** at the bottom of the Time Sheet/Leave Request/Proxy screen.

The Proxy Set Up screen displays.



2. Choose a Proxy from the drop down list of users.
3. Check the **Add** checkbox.
4. Click **Save**.

NOTE: A proxy remains active until you remove them from your proxy list.

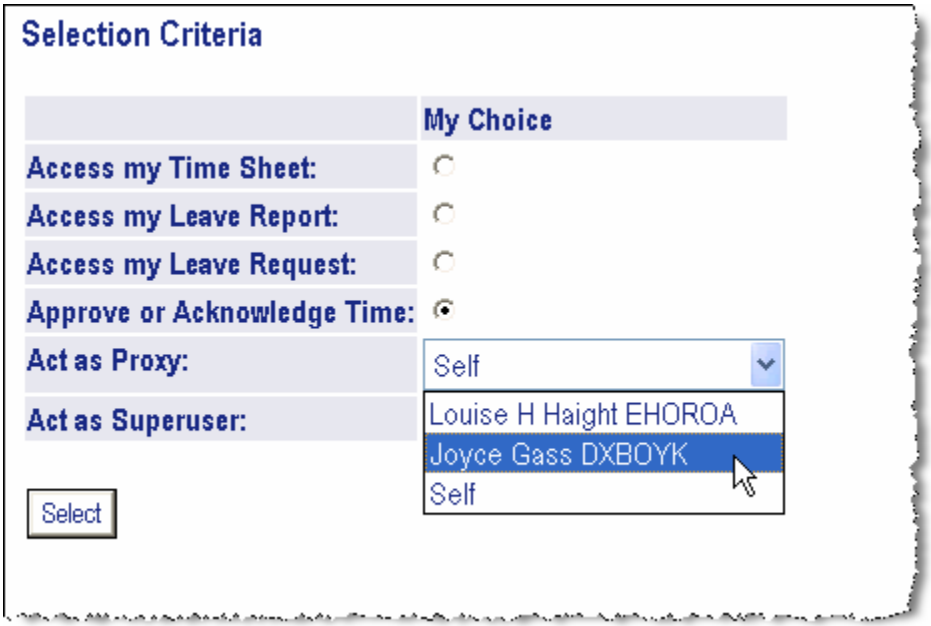
Proxy Reminders
• **Must set up at least one Proxy Approver** to approve time sheets in the absence of the primary Approver. • **Must tell the Proxy** which pay periods to approve. • **May add or delete a Proxy** at any time by using the Proxy Set Up screen.

Acting as a Proxy

As a designated proxy, the approver needs to inform you which pay periods you should approve.

To approve time sheets:

1. Complete Employee Self Service Login.
2. Click on **Time Sheet** from the ESS menu, the Selection Criteria screen displays.



3. Select **Approve or Acknowledge Time**.
4. Using the drop down arrow, select who you are acting as proxy for, (i.e., who is the approver) in the **Act as Proxy** field.

NOTE: You will see the Time Sheet/Proxy Selection Criteria screen when you are an active proxy.

5. Click **Select,** the Selection screen displays.
6. Select the Organization and Pay Period.
7. Refer to Sections 2 and 3 for the complete steps on approving time sheets.