Colgate University

Web Time Entry & Approval Guide

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Web Time Entry & Approval Guide

Purpose

This document is intended to provide an introduction to Web Time Entry. Web Time Entry is the time sheet method for hourly employees at Colgate University. Hourly employees will enter and submit their time sheets every pay period. All hours worked and any exception time in which the employee is eligible will be entered and submitted on time sheets such as sick leave, vacation leave, overtime, etc. Once the time sheet is submitted, the employee's supervisor will be responsible for approving the time entered. Once the time sheet is approved, it will then be reviewed and processed by Payroll.

What is Banner?

Banner is a suite of integrated software systems designed for managing colleges and other institutions. Banner is an Enterprise Resource Planning (ERP) system, which is a single solution to Colgate University's Human Resources, Finance, Student, Financial Aid, and Advancement systems.

Banner itself is divided into two parts: Internet Native Banner (INB) which includes administrative and other functions used to change or maintain Banner, and Banner Self-Service.

Important Notes

Time must be entered via the Web Time Entry method according to the posted payroll schedule.

When entering time, it is important to note your available sick and vacation leave balances.

Download payroll schedules at: http://www.colgate.edu/payroll

Work Flow Summary

1 Employee enters time daily.

2 Two days prior to the end of the scheduled pay period, 7am
Email reminder sent to the employee

3 On the day time sheets are due, 7am
Email reminder to the employee for any time sheets not in progress

4 Deadline for time sheet submission by the employee, 9am

5 On the day time sheets are due, 9am
Email reminder to the supervisor that time sheets are due today

6 On the day time sheets are due, 11am
Email reminder sent to the supervisor if time sheets are not submitted

7 On the day time sheets are due, 1:30pm
Email reminder sent to supervisor, proxy and employee, if time sheets have not been submitted

8 Deadline for time sheet approval by the supervisor or proxy, 4pm

Accessing Banner Self Service through the Colgate Portal

1. Open your internet browser on your computer.

2. In the Address field, enter: **portal.colgate.edu** and press **Enter.**

3. Select **Sign in to the Portal**.

4. Enter your **Colgate Username** and **Password** and then click **Sign In**.

5. You will automatically be taken to the home page of the **Colgate Portal**.

6. On the **Banner Self-Service** channel, click **All Banner Self-Service Links**. You will be navigated to the home page of **Banner Self-Service**.

Accessing Your Time Sheet

1. After logging into **Banner Self-Service**, click on the **Employee Services** link. You will be taken to the **Employee** menu.

2. Click on **Time Sheet**. If you are setup to approve time sheets for employees or act as a proxy for an approver, you will be taken to the **Time Sheet/Approver/Proxy** page. If you do not approve time sheets or are not a proxy for an approver, you will be taken to the **Position Selection** page.

3. If taken to the **Time Sheet/Approver/Proxy** page, select the **Access my Time Sheet** radio button and click **Select**. You will then be navigated to the **Position Selection** page. This page lists all your active jobs that required a time sheet and the status of the time sheet.

4. Select the **My Choice** radio button next to the job for which you want to enter hours. The **Pay Period and Status** will default to the most recent. Select the pay period from the drop-down list and then click **Time Sheet**. You will be taken to the **Time Sheet** page.

Entering Your Time

NOTE: The header of the **Time Sheet** page contains the *Job Title* and *Position Number*, Department, *Time Sheet Period*, and *Submit by Date*. The *Submit by Date* is the due date and time when the time sheet must be submitted for approval.

Time Sheet

Title and Number:			Administrative Assistant -- AS2002-00							
Department and Number:			Human Resources Office -- 52050							
Time Sheet Period:			SEP 30, 2013 to OCT 13, 2013							
Submit By Date:			OCT 14, 2013 by 12:00 PM							

Earning	Shift	Default Hours or Units	Total Hours	Total Units	Monday SEP 30, 2013	Tuesday OCT 01, 2013	Wednesday OCT 02, 2013	Thursday OCT 03, 2013	Friday OCT 04, 2013	Saturday OCT 05, 2013	Sunday OCT 06, 2013
Regular Pay	1	75	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Regular Hours-Above Base Hours	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Overtime Pay	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Vacation Pay	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Sick Pay	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Holiday Pay	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Summer Adjustment	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Winter Holiday Break	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Total Hours:			0		0	0	0	0	0	0	0
Total Units:				0	0	0	0	0	0	0	0

[Position Selection] [Comments] [Preview] [Submit for Approval] [Restart] [Next]

NOTE: The time sheet portion of the **Time Sheet** page lists the earning types for which your job is eligible, and the days during the pay period in which you can enter hours. The page only shows seven days at one time. In order to access the next or previous seven days, you would click on the **Next** or **Previous** button.

[Position Selection] [Comments] [Preview] [Submit for Approval] [Restart] [Previous] [Next]

Time In and Out

ⓘ Please enter your time in intervals of 15 minutes (10:00, 10:15, 10:30, 10:45). The format should be 99:99. Please also remember to indicate whether the hours worked are an AM or PM shift.

Minimum time lengths for meals are mandated by state law; please refer to the Personnel Policies and Benefits Handbook for additional information.

Date: Monday, SEP 30, 2013
Earnings Code: Regular Pay

Shift	Time In		Time Out		Total Hours
1	08:00	AM	12:00	PM	4
1	01:00	PM	04:30	PM	3.5
1		AM		AM	0
1		AM		AM	0
1		AM		AM	0
					7.5

[Time Sheet] [Next Day]
[Add New Line] [Save] [Copy] [Delete]

Account Distribution
Earnings Code Shift Hours
Regular Pay   1   7.5   [Account Distribution]

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1. To enter hours, click the **Enter Hours** link for the appropriate **Earning** under the day in which you worked. You will be navigated to the **Time In and Out** page.

2. The **Time In and Out** page will be displayed. You will record your hours worked by entering time-in as the time you started working and time-out as the time you stopped working for each day you worked. Please ensure that all unpaid breaks (for example required meal breaks) are not included in the hours worked. Time must be entered in 15 minute increments (i.e. 10:00, 10:15, 10:30, and 10:45). If you have filled out all the available lines for that day and need additional room, click **Add New Line** to enter additional time in and out.

3. When you have entered your hours, click **Save** and your total hours for the day will be automatically calculated. **You must click Save for your hours to be recorded**.

4. You can then select **Previous Day, Next Day** or go back to **Time Sheet**. **Previous Day** or **Next Day** will allow you to enter hours for that date. **Time Sheet** will navigate you back to the **Time Sheet** page. Either option will allow you to continue entering until all hours worked for the pay period have been recorded.

5. You also have the options to either **Copy** or **Delete**. If you would like to copy the time-in and time-out to different days under the same **Earnings**, click on **Copy**. Then, select the dates that you want to copy to by selecting the check box for each date and then click **Copy**. **Delete** will remove the hours that you entered for that date.

6. If you have not completed entering your hours for the entire pay period, you may exit out of the system. You can return to enter additional hours at a later date. To exit out, click the X at the top right of the screen.

[Position Selection] [Comments] [Preview] [Submit for Approval] [Restart] [Previous] [Next]

Copy

ⓘ To copy to the end of the pay period, click the corresponding check box. If you want to copy weekend dates, be sure to check Include Saturday(s) and/or Include Sunday(s). To copy individual dates, click the check box under the appropriate dates. If you select copy to a date in which time has previously been entered, that information will be overwritten with the new **Earnings** and **Hours** information.

Earnings Code: Regular Pay
Date and Hours to Copy: SEP 30, 2013, 7.5 Hours
Copy from date displayed to end of the pay period: ☐
Include Saturdays: ☐
Include Sundays: ☐
Copy by date:

Monday SEP 30, 2013	Tuesday OCT 01, 2013	Wednesday OCT 02, 2013	Thursday OCT 03, 2013	Friday OCT 04, 2013	Saturday OCT 05, 2013	Sunday OCT 06, 2013
☐	☑	☑	☑	☐	☐	☐

Monday OCT 07, 2013	Tuesday OCT 08, 2013	Wednesday OCT 09, 2013	Thursday OCT 10, 2013	Friday OCT 11, 2013	Saturday OCT 12, 2013	Sunday OCT 13, 2013
☑	☑	☐	☑	☑	☐	☐

[Time Sheet] [Previous Menu] [Copy]

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⚠ Your hours have been copied successfully.

WARNING: Copying will override any previously recorded hours for that earn code for the days selected.

Entering Comments

Before submitting your time sheet for approval, you have the option to enter comments on your time sheet for your supervisor. Any comments made should be appropriate and relevant to the information on the time sheet only.

1. On the **Time Shee**t page, click **Comments**.

2. Enter your comments.

3. Click **Save.**

Comments

ⓘ Comments may be entered in the text box below. Any comment made should be appropriate and relevant to the information on the time sheet only. Click the **Save** button to save your comments, then click **Previous Menu** to return to the time sheet.

Made By: You
Comment Date: OCT 03, 2013
Enter or Edit Comment: [   ]

[Save] [Previous Menu]

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Submitting Your Time Sheet for Approval

After you have entered hours for the entire pay period and you are ready to submit your time sheet to your supervisor for approval:

Time Sheet

Earning Code	Shift	Total Hours	Total Units	Monday , SEP 30, 2013	Tuesday , OCT 01, 2013	Wednesday, OCT 02, 2013	Thursday , OCT 03, 2013	Friday , OCT 04, 2013	Saturday , OCT 05, 2013	Sunday , OCT 06, 2013	Monday , OCT 07, 2013	Tuesday , OCT 08, 2013	Wednesday, OCT 09, 2013	Thu OCT 201
Regular Pay	1	60		7.5	7.5	7.5	7.5				7.5	7.5		
Vacation Pay	1	7.5						7.5						
Sick Pay	1	7.5											7.5	
Total Hours:		75		7.5	7.5	7.5	7.5	7.5			7.5	7.5	7.5	
Total Units:			0											

Time In and Out, Regular Pay

Monday SEP 30, 2013	Tuesday OCT 01, 2013	Wednesday OCT 02, 2013	Thursday OCT 03, 2013	Friday OCT 04, 2013	Saturday OCT 05, 2013	Sunday OCT 06, 2013	Monday OCT 07, 2013	Tuesday OCT 08, 2013	Wednesday OCT 09, 2013	Thursday OCT 10, 2013	Friday OCT 11, 2013	Saturday OCT 12, 2013	Sunday OCT 13, 2013
08:00 AM 12:00 PM 01:00 PM 04:30 PM	08:00 AM 12:00 PM 01:00 PM 04:30 PM	08:00 AM 12:00 PM 01:00 PM 04:30 PM	08:00 AM 12:00 PM 01:00 PM 04:30 PM				08:00 AM 12:00 PM 01:00 PM 04:30 PM	08:00 AM 12:00 PM 01:00 PM 04:30 PM		08:00 AM 12:00 PM 01:00 PM 04:30 PM	08:00 AM 12:00 PM 01:00 PM 04:30 PM		

1. On the **Time Sheet** page, click **Preview** to review and confirm the hours entered for the pay period are correct. Preview allows you to review hours entered and the time in and out for each day entered. Also, any comments that have been entered will display. Once confirmed correct, click **Previous Menu**.

2. Click **Submit for Approval,** this will allow your supervisor to be able to review and approve your time sheet. If you mistakenly click **Submit for Approval** prior to entering all your hours, and prior to the employee submission deadline, you may return your time sheet by clicking **Return Time**. If the employee submission deadline has passed, or your supervisor has already accessed your time sheet, then your supervisor will need to use the **Return for Correction** function to return the time sheet to you.

⚠ Your time sheet was submitted successfully.

Options Before Submitting

| Position Selection | Comments | Preview | Submit for Approval | Restart | Previous | Next |

Options After Submitting

| Position Selection | Comments | Preview | Next | Return Time |

NOTE: Once a time sheet has been submitted for approval, the submission date and Approver will populate.

Account Distribution: Displays the labor distribution for the position. This is for informational purposes only.

Position Selection: Navigates you to the **Position Selection** screen which allows you to select another time sheet for a different position, if applicable.

Restart: If the time sheet has not been submitted for approval, this button will erase all hours previously entered and saved for the given pay period.

Time sheet Status Descriptions

Time sheet Status	Description
Not Started	The employee has not yet started to enter hours on the time sheet.
In Progress	The time sheet has been started by the employee, but has not been submitted for approval.
Pending	The time sheet has been completed by the employee and submitted for approval. The record is waiting for the approver (or proxy) to approve the time. The approver may send it back for correction.
Return For Correction	The time sheet has been returned to the employee for correction.
Approved	The time sheet has been approved and has been electronically sent to the Payroll Department.
Error	The time entry record contains an error. The error message will be displayed.
Completed	The time sheet has been fully processed for payment.

Logging Off

It is important that you exit out of your session when you are finished entering time and close the internet browser.

Accessing Banner Self Service through the Colgate Portal

1. Open your internet browser on your computer.

2. In the Address field, enter: **portal.colgate.edu** and press **Enter**.

3. Select **Sign in to the Portal**

4. Enter your **Colgate Username** and **Password** and then click **Sign In**.

5. You will automatically be taken to the home page of the **Colgate Portal**.

6. On the **Banner Self-Service** channel, click **All Banner Self-Service Links**. You will be navigated to the home page of **Banner Self-Service**.

Accessing Your Employees' Time Sheets

1. After logging into **Banner Self-Service**, click on the **Employee Services** link. You will be taken to the **Employee** menu.

2. Click on **Time Sheet**. You will be taken to the **Time Sheet/Approver/Proxy** page.

3. The **Approve or Acknowledge Time** radio button will be defaulted. To select all departments, click the **Approve All Departments** checkbox. Click **Select**.

Accessing Your Employees' Time Sheets (continued)

5. Select the Payroll ID and Pay Period for which you want to approve time for from the drop-down list. Click **Select.** You will then be navigated to the **Departmental Summary** page.

Selection

Type of Records: Time Sheet
Pay Periods: B1, SEP 30, 2013 to OCT 13, 2013
Chart of Accounts: C, Colgate University

Sort Order

	My Choice
Sort employees' records by Status then by Name:	⦿
Sort employees' records by Name:	◯

Select

Payroll ID	Web Time Entry Employee Groups
B1	Support Staff and Technical Staff
B2	Casual Wage Employees
B3	Student Employees

COA: C, Colgate University
Department: All
Pay Period: SEP 30, 2013 to OCT 13, 2013
Act as Proxy: Not Applicable
Pay Period Time Entry Status: Open until OCT 14, 2013, 05:00 PM

Change Selection | Select All, Approve or FYI | Reset | Save

Pending

ID	Name, Position, Title and Department	Required Action	Total Hours	Total Units	Queue Status	Approve or FYI	Return for Correction	Cancel	Other Information
001004578	Test Employee AS2002 - 00 Administrative Assistant 52050, Human Resources Office	Approve	75.00	.00		☐	☐		Change Time Record Comments Leave Balance

Pay Event Transactions
Action required by all approvers:	0
Time or Leave Transactions Approved or FYI:	0
Time or Leave Transactions Awaiting Approval or FYI:	1
Total:	1
Total Hours:	75.00
Total Units:	.00

Change Selection | Select All, Approve or FYI | Reset | Save

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Monitoring and Approving Time Sheets

The **Departmental Summary** page will display. The page consists of three sections; the General Information section, the Employee List section, and the Pay Event Transactions section.

Field	Description
Chart of Accounts (COA)	Displays the COA
Department	Displays the Org Code and Description
Pay Period	Displays the date range of the pay period
Act as Proxy	Displays either Not Applicable if you are approving your department time sheets or the name of the supervisor for the time sheets you are approving
Pay Period Time Entry Status	Displays the date and time in which time sheets should be submitted and approved

General Information

Field	Description
ID	Banner ID number of the employee
Name, Position, and Title	Employee's Name Position Number and Position Title
Required Action	The next action that needs to be taken
Total Hours	The total number of hours that have been recorded on the time sheet.
Total Units	Not applicable
Queue Status	Will display Overridden if the time sheet has been approved by Payroll
Approve or FYI	Check box to approve or acknowledge the time sheet
Return for Correction	Check box to return the time sheet to the employee for correction
Other Information	Links to for the following: Change Time Record View Comments View Leave Balances

Employee List

Field	Description
Action required by all approvers	Displays the number of time sheets that require approver action
Time or Leave Transactions Approved or FYI	Displays the number of time sheets that have been approved
Time or Leave Transactions Awaiting Approval or FYI	Displays the number of time sheets that are awaiting approval
Act as Proxy	Displays either Not Applicable if you are approving your department time sheets or the name of the supervisor for the time sheets you are approving
Total Hours	Displays the combined total hours

Pay Event Transactions

1. To review a specific employee's time sheet, click on the employee's name. This will navigate you to the **Employee Detailed Information** screen. This preview of the time sheet will consist of the following sections; General Information section, Time Sheet section, Time In and Out, Comments, Routing Queue, Account Distribution Default Data section, and the following buttons:

2. You can return the time sheet for correction to the employee by clicking **Return for Correction**. Once this option has been selected, the **Transaction Status** will change from **Pending** to **Returned for Correction**. **If you are going to return a time sheet for correction, a comment should be entered and saved indicating what needs to be corrected on the time sheet.**

3. You can add a comment to the time sheet by clicking **Add Comment**. Any comment made should be appropriate and relevant to the information on the time sheet only.

4. You can approve the time sheet by clicking **Approve**. Once this option has been selected, the **Transaction Status** will change from **Pending** to **Approved**. The time sheet will then be processed for payment by the Payroll Department.

5. You can delete the time sheet by clicking **Delete**. Once this option has been selected, the employee's time sheet will be deleted and will not be processed for payment. The delete function should only be used in select circumstances, and when you are sure the time sheet needs to be deleted.

6. You can go to the previous or next employee's time sheet by clicking either **Previous** or **Next.**

It is important that you exit out of your session when you are finished approving

time and close the internet browser.

Monitoring and Approving Time Sheets (Continued)

Employee Detailed Information

Please review the time sheet to confirm the accuracy. If correct, click **Approve**. If corrections need to be made, click **Add Comment** to enter the reason for the time sheet being returned, and then click **Return for Correction**.

Employee ID and Name: 001004578 Test Employee	**Department and Description:**	C 52050 Human Resources Office
Title: AS2002-00 Administrative Assistant	**Transaction Status:**	Pending

[Previous Menu] [Approve] [Return for Correction] [Change Record] [Delete] [Add Comment]

Comments | Routing Queue | Account Distribution

Time Sheet

Earnings	Shift	Special Rate	Total Hours	Total Units	Monday, SEP 30, 2013	Tuesday, OCT 01, 2013	Wednesday, OCT 02, 2013	Thursday, OCT 03, 2013	Friday, OCT 04, 2013	Saturday, OCT 05, 2013	Sunday, OCT 06, 2013	Monday, OCT 07, 2013	Tuesday, OCT 08, 2013	Wednesd OCT 09, 2013
Regular Pay	1		75		7.5	7.5	7.5	7.5	7.5			7.5	7.5	
Total Hours:			75		7.5	7.5	7.5	7.5	7.5			7.5	7.5	
Total Units:				0										

Time In and Out

Earnings	Monday, SEP 30, 2013	Tuesday, OCT 01, 2013	Wednesday, OCT 02, 2013	Thursday, OCT 03, 2013	Friday, OCT 04, 2013	Saturday, OCT 05, 2013	Sunday, OCT 06, 2013	Monday, OCT 07, 2013	Tuesday, OCT 08, 2013	Wednesday, OCT 09, 2013	Thursday, OCT 10, 2013	Friday, OCT 11, 2013	Sa O 20

Adding and Removing Approval Proxies

Time Sheet/Approver/Proxy

ℹ️ Determine the action you want to take and click the radio button. If you are approving time sheets, click the check box to **Approve All Departments**. If you are acting as a Proxy for an approver, please select the approver's name from the drop-down list and click **Select**.

Selection Criteria

	My Choice
Access my Time Sheet:	○
Access my Leave Report:	○
Access my Leave Request:	○
Approve or Acknowledge Time:	◉
Approve All Departments:	☐
Act as Proxy:	Self ▾
Act as Superuser:	☐

[Select]

Proxy Set Up

1. Click on the **Proxy Set Up** link at the bottom of the **Time Sheet /Approval /Proxy** page.

2. You will be navigated to the **Proxy Set Up** page.

3. Select the employee that you want to setup as your proxy from the **Name** drop-down list. The names will appear alphabetically by last name. If the individual you wish to select is not listed, contact Human Resources at ext. 7411.

4. After you have selected the employee, click the **Add** check box and then click **Save**.

5. To remove a proxy, click the **Remove** check box and then click **Save.**

Proxy Approval Instructions

Accessing Banner Self Service through the Colgate Portal

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2. In the Address field, enter: **portal.colgate.edu** and press **Enter.**

3. Select **Sign in to the Portal**

4. Enter your **Colgate Username** and **Password** and then click **Sign In**.

5. You will automatically be taken to the home page of the **Colgate Portal**.

6. On the **Banner Self-Service** channel, click **All Banner Self-Service Links**. You will be navigated to the home page of **Banner Self-Service**.

Accessing Employees' Time Sheets

1. After logging into **Banner Self-Service**, click on the **Employee Services** link. You will be taken to the **Employee** menu.

2. Click on **Time Sheet**. You will be taken to the **Time Sheet /Approver /Proxy** page.

3. As the Proxy you would then select the approver's name from the **Act as Proxy** drop-down list and then click **Select**. This will navigate you to the **Approver Selection** page.

NOTE: If they are no names within the drop-down list, you have not been set up as a proxy. Contact the approver.

4. The Proxy would then select the department in which they want to approve time for and click **Select.** This will navigate the proxy to the **Departmental Summary** page.

5. Select the **Employee Name** to review their time sheet for approval.

6. Clicking **Approval** submits the time sheet to the Payroll Department for processing. **Return for Correction** would be selected if changes need to be made to the time sheet by the employee, comments should be entered if selecting to return the time sheet. Selecting **Delete** will delete the entire time sheet and will not allow the time sheet to be processed for payment. The delete function should only be used in select circumstances, and when you are sure the time sheet needs to be deleted.

It is important that you exit out of your session when you are finished approving time and close the internet browser.

Questions or Comments