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.

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.

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

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.

![Figure 1](image-url)
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 NTRRQUE.

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).

![Figure 2](image)

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 reflect the internal structure.

HOME ORG: 203000

In this unit, two supervisors manage two separate employee teams. The unit has several options for a time entry approval structure as noted in the examples that follow.

Figure 3
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](image-url)

TS-ORG: 203000  
Supervisor 1  
Time approver  
Employee Group 1

TS-Org: 203001  
Supervisor 2  
Time approver  
Employee Group 2

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)

![Image](https://example.com/image5.png)

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.

![Image](https://example.com/image6.png)

Figure 6
Figure 7

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.

The unit chose to assign Supervisor 1 as the **Time Approver**.

Supervisor 2 was given the role of **Approver Proxy** but was not added to the time approval routing queue.

While Supervisor 1 and Supervisor 2 will see all of the employee timesheets, they only need to review and approve the timesheets for their employees. If a supervisor is out of the office, the other supervisor can review and approve all of the employee timesheets.

Figure 9
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).

![Routing Queue Rules Form](image-url)

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).

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<tr>
<th>Time Entry</th>
<th>Time Entry Approver Proxy</th>
<th>Time Entry Approver Proxy Proxy Maintenance Form</th>
<th>Time Entry Approver Proxy Proxy Maintenance Form</th>
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Figure 11

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Figure 12
c. Electronic Approval Proxy Rules Form (NTRPROX)
Supervisor 1 assigns Supervisor 2 as their Approver Proxy in NTRPROX (see Figure 13).

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).

Figure 14

Supervisor 1 is taking on the role of an **Acknowledger**. He can only review and add comments to the timesheets. Supervisor 1 cannot approve timesheets.

Supervisor 2 has been assigned the role of **Time Approver**. Supervisor 2 would have the responsibility of approving all of the timesheets.
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).

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).
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.

Routing queue approval roles are sequential. If Supervisor 1 is a *Time Approver*, Supervisor 2 would not be able to review or approve any of the timesheets until Supervisor 1 approved all of the timesheets.

This can cause delays in the time entry and approval process if an approver is unexpectedly out of the office.

Figure 18
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).
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).
c. Electronic Approval Proxy Rules Form (NTRPROX)
Supervisor 1 assigns Supervisor 2 as their Approver Proxy in NTRPROX (see Figure 22).

Figure 22