Time Entry and Approval Routing Security Setup

This job aid contains the steps to initiate time entry and approval routing security.

I. **Initiate Time Entry Security and Setup**
II. **Request Security Profiles in the Security Application**
III. **Review and Modify Time Approval Routing Queue**
IV. **Situations to Avoid**

Position definitions

There are three key unit roles involved in the time entry and approval routing security setup process:

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

I. Initiate Time Entry Security and Setup

The time entry and security setup has several interrelated pieces. Each of these pieces should be coordinated between the USC and Administrative Information Technology Services (AITS).

New TS-Orgs

The TS-Org is used by the USC in the security profile requests. The individuals in your unit who are being assigned time entry and approval roles will also need security access to the TS-Org. If the unit chooses to create separate time approval routing queues by TS-Org, the unit should identify an unused Banner Org Code related to their department which can be assigned as a new TS-Org.

Adjustment Notification Application Security for the New TS-Org

If your unit decides to add a new TS-Org and time approval routing queue, your USC will need to request the appropriate security related to the ***Adjustment Notification Application (ANA)*** so that any ***ANA*** based transactions (e.g., overpayment adjustments, leave balance requests) for employees moved to the new TS-Org can be processed.

Your USC will submit a request to designate a **Department Workflow Originator** and a **Department Workflow Approver** for each new TS-Org through the ***Security Application***.

If the unit does not have an unused org code, a new Banner Org Code can be requested from University Accounting and Financial Reporting by filling out and submitting Banner Organization Code Request Form to cfoapalmaintenance@uillinois.edu.

PARIS Security for New TS-Org

Your USC will need to request the appropriate security related to ***PARIS***. New ***PARIS*** users need to complete training before your USC can request the ***PARIS PUA*** security profile. More information can be found at the ***PARIS Resource*** page.

1. Request Security Profiles in the Security Application

Before a time entry routing queue is created, the USC submits the security requests for the time entry roles. If the individual is being granted Banner HR access for the first time, the USC must also request the appropriate organization and employee class (e-class) access. The USC submits these security requests through the ***Security Application*** found on the ***Unit Security Contact (USC) Website***.

1. Login to the Security Application

1)	Go to https://www.aits.uillinois.edu/access/usc_website.
2)	Click the **Security Application Login** button.
3)	Type your **ID** and **Password**.
4)	Click the **Login** button.

2. Initiate an Employee Access Request

The USC will provide their department information to direct the security profile request to the appropriate university authorization group and the UIN of the employee *(see Figure 24)*.

1)	Click **Initiate Request**.
2)	Select the **Campus**. *(See Figure 24)*
3)	Select the **College** code.
4)	Select the **Department** code.
5)	Type the employee **UIN**.
6)	Click the **Retrieve** button.

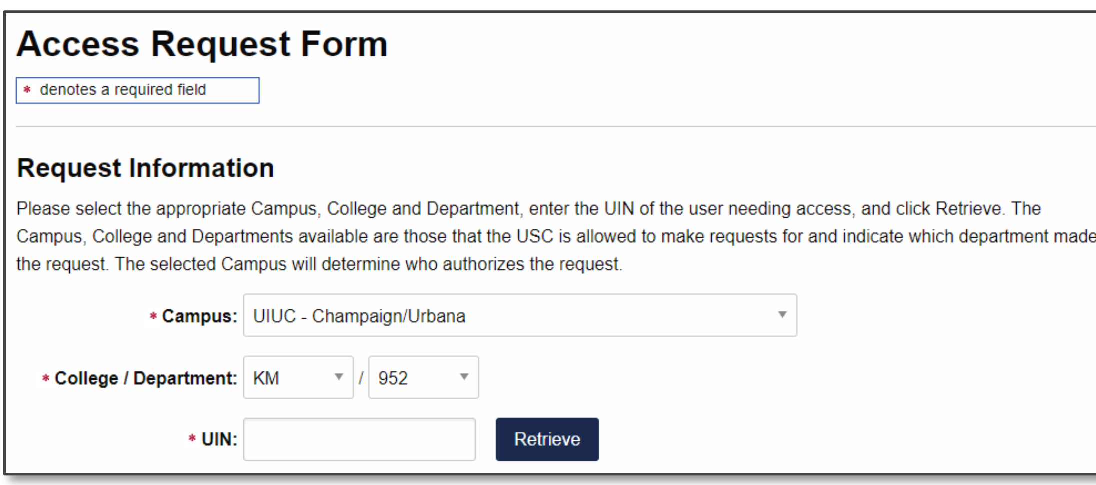


Figure 24

3. Review and Complete the Security Compliance Statements

With every security profile request, the USC must review and complete the security compliance statements *(see Figure 25)*.

1)	Click **Continue**.
2)	Read the verification message and respond to it as needed to confirm that the department has a signed copy of the *Information Security Compliance Form* on file. (*See Figure 25)*

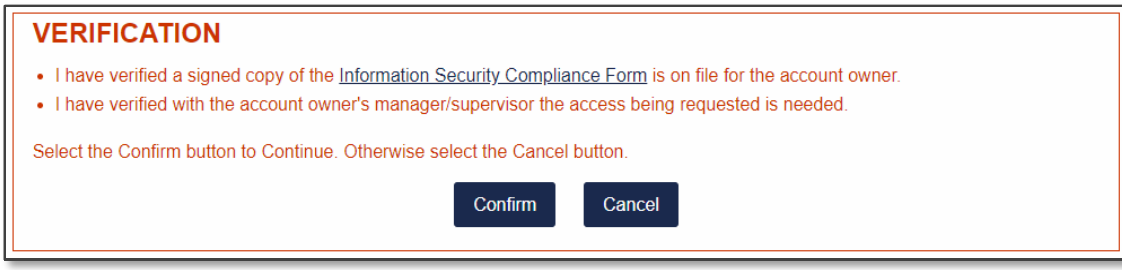


Figure 25

4. Request E-class Access

Before requesting an e-class security profile, the USC needs to determine if the individual needs access to Master e-classes (all e-classes) or Restricted e-classes (certain e-classes i.e. BA, CC, etc). An individual cannot have both Master e-class and Restricted e-class access.

Master E-class Access Request Steps

1)	In the Security Application, in the **Security Main Menu**, click on the **Banner HR-Pay** link.
2)	Click the **Employee Class Access** increment link.
3)	Click **Add** from the drop down in ***Action*** column for **Master Employee Class Access**. *(See Figure 26)*.
4)	Click either of the two settings (it does not matter which one) in the **Settings** column.
5)	Under the Master Access heading, select **MASTER** with an Action of **Add**.
6)	Click the **Save** button.
7)	Click the **View/Submit Request** button if finished requesting access for this individual.

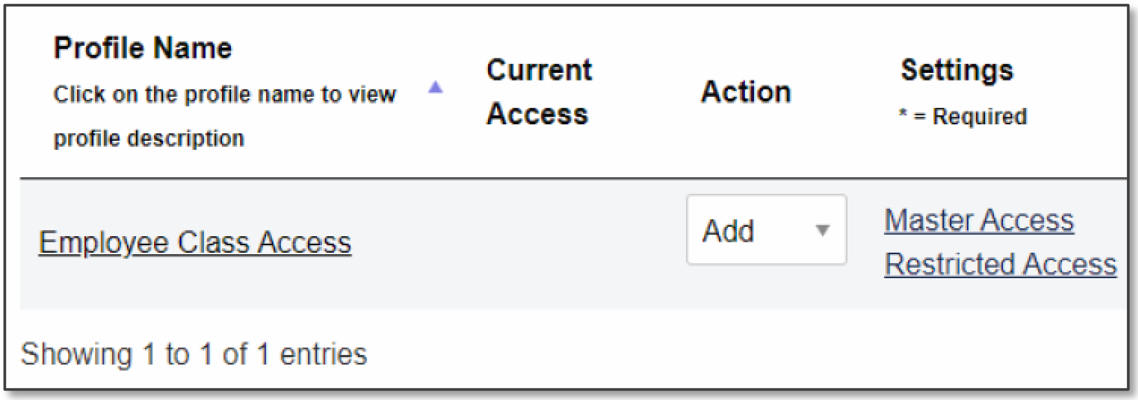


Figure 26

Restricted E-class Access Request Steps

1)	In the Security Application, in the **Security Main Menu**, click on the **Banner HR-Pay** link.
2)	Click the **Employee Class Access** increment link.
3)	Click **Add** from the drop down in the ***Action*** column. *(See Figure 26)*
4)	Click either of the two settings in the ***Settings*** column. *It does not matter which one you click as both will take you to the same Settings screen.*
5)	Under the **Restricted Access** header, select the appropriate e-class code from the drop down.
6)	Select **Action** as **Add**. *(See Figure 27)*
7)	Click the **Save** button.
8)	If there are additional employee classes to be added, select any additional e-classes from the drop down as needed, with Action as Add. *Click* **Save** *after each additional e-class has been added until all e-classes are added.*
9)	Click the **Profiles** button when finished adding e-classes. Click **View/Submit Request** button if finished requesting access for this individual.

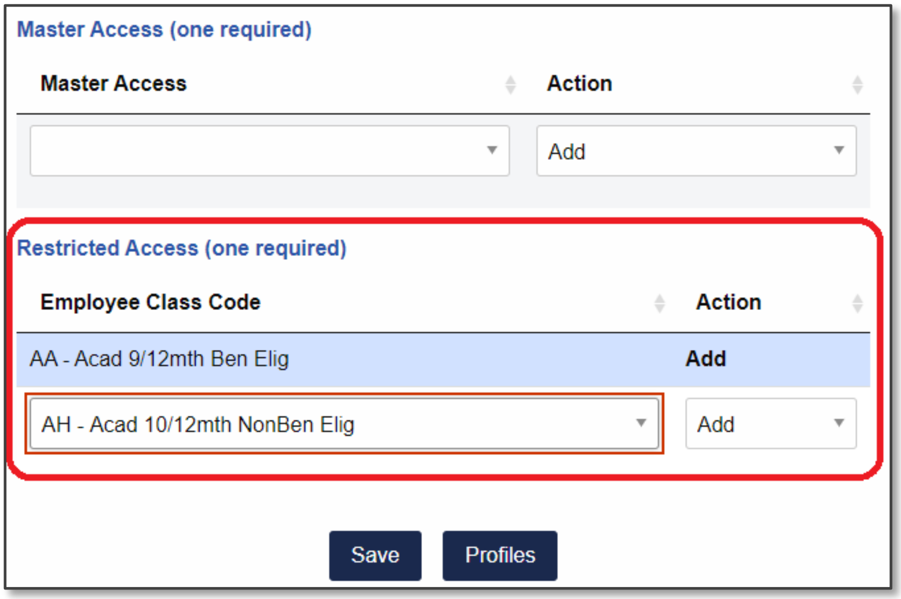


Figure 27

5. Request TS-Org Access

Determine which TS-Org(s) must be accessible to the individuals who will have time entry roles. Remember to include TS-Orgs for proxy roles.

1)	In the Security Application, in the **Security Main Menu**, click on the **Banner HR-Pay** link.
2)	Click the **HR Org Code Access** increment link.
3)	Select **Add** from the drop down in the ***Action*** column for **Department HR Organization Level Access.** *(See Figure 28)*
4)	Click the **Dept Org Code Access** link in the ***Settings*** column for **Department HR Organization Level Access**.
5)	Select the **Chart of Accounts** from the drop down.
6)	Select the **From Organization** to choose a beginning point for a range of organization codes.
7)	Select the **To Organization** to choose an end point for the range of organization codes. *Orgs can be added in ranges, so you don't necessarily have to enter each org individually. But all orgs inside the range will be included, so be certain a range is appropriate.*
8)	Select **Add** in the ***Action*** column.
9)	Click the **Save** button.
10)	Click the **Profiles** button when finished adding TS-Orgs. Then click the **View/Submit Request** button if finished requesting access for this individual.

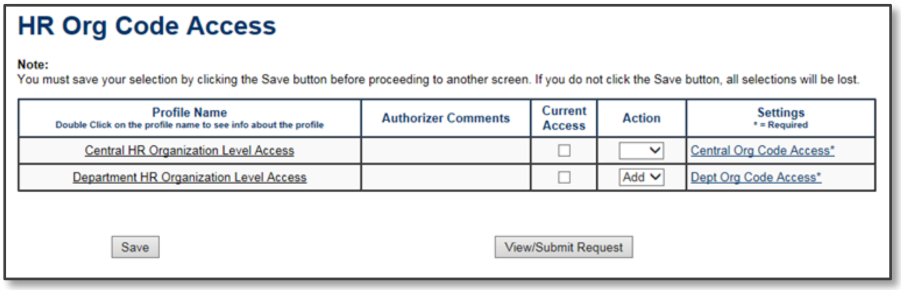


Figure 28

II. Request Time Entry Security Profile

For each individual with a time entry role, determine which time entry security profile is needed for their role (e.g., **Web and/or Department Time Entry Approver** or **Time Entry Approver Proxy**). For each employee with a time entry role, the preceding security steps of *Initiate Employee Access Request*, *Review and Complete Security Compliance Statements*, *Request E-Class Access*, and *Request TS-Org Access* must be completed in that order before the **Time Entry** security profile is requested.

1. Request Web and/or Department Time Entry Approver Security Profile

1)	In the Security Application, in the **Security Main Menu**, click on the **Banner HR-Pay** link.
2)	Click the **Time Entry** increment link.
3)	Select **Add** in the ***Action*** column for **Web and/or Department Time Entry Approver.** *(See Figure 29)*
4)	Click the **Save** button.
5)	If finished requesting access, click the **View/Submit Request** button.

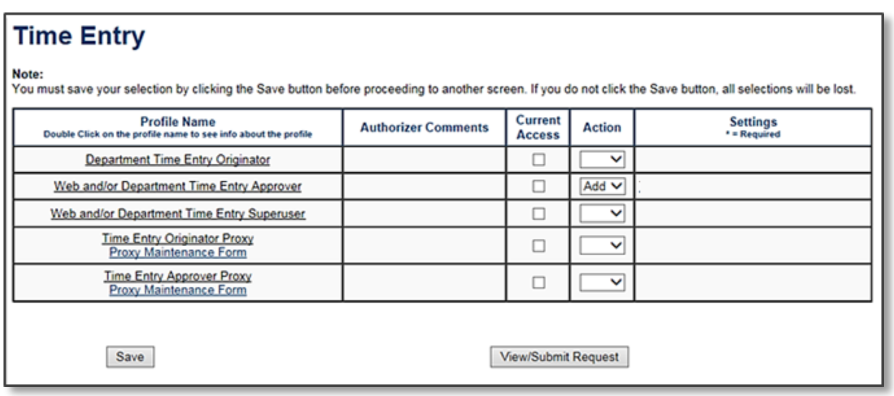


Figure 29

2. Request Web and/or Department Time Entry Superuser Security Profile

1)	In the Security Application, in the **Security Main Menu**, click on the **Banner HR-Pay** link.
2)	Click the **Time Entry** increment link.
3)	Select **Add** in the ***Action*** column for **Web and/or Department Time Entry Superuser.** *(See Figure 30)*
4)	Click the **Save** button.
5)	Click the **View/Submit Request** button.

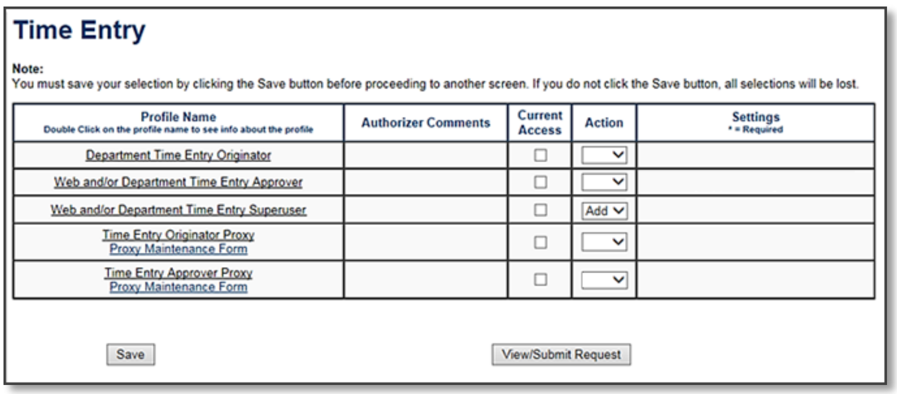
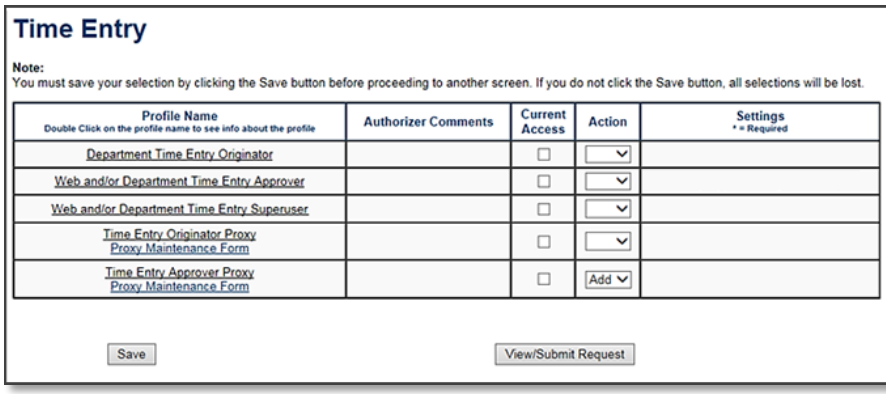


Figure 30

3. Request Time Entry Originator Proxy Security Profile

1)	In the Security Application, in the **Security Main Menu**, click on the **Banner HR-Pay** link.
2)	Click the **Time Entry** increment link.
3)	Select **Add** in the ***Action*** column for **Time Entry Originator Proxy.** *(See Figure 31)*
4)	Click the **Save** button.
5)	Click the **View/Submit Request** button.


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.

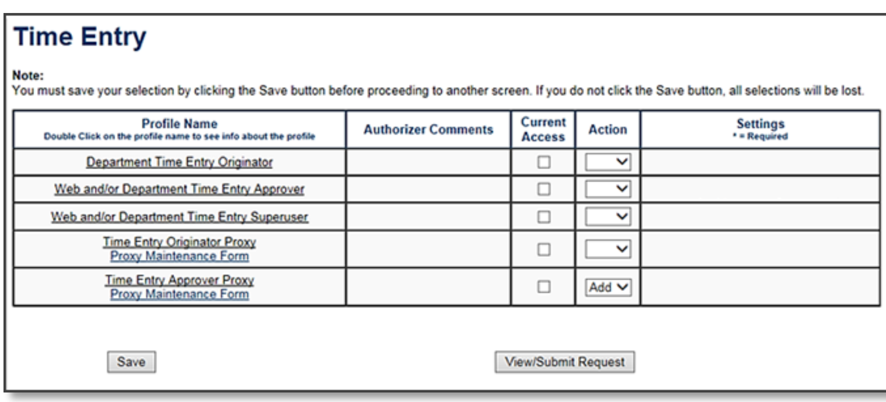
Profile Name Double Click on the profile name to see info about the profile	Authorizer Comments	Current Access	Action	Settings * = Required
Department Time Entry Originator		☐		
Web and/or Department Time Entry Approver		☐		
Web and/or Department Time Entry Superuser		☐		
Time Entry Originator Proxy Proxy Maintenance Form		☐		
Time Entry Approver Proxy Proxy Maintenance Form		☐	Add	

Save   View/Submit Request

Figure 31

4. Request Time Entry Approver Proxy Security Profile

1)	In the Security Application, in the **Security Main Menu**, click on the **Banner HR-Pay** link.
2)	Click the **Time Entry** increment link.
3)	Select **Add** in the ***Action*** column for **Time Entry Approver Proxy.** *(See Figure 32)*
4)	Click the **Save** button.
5)	Click the **View/Submit Request** button.


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 Double Click on the profile name to see info about the profile	Authorizer Comments	Current Access	Action	Settings * = Required
Department Time Entry Originator		☐		
Web and/or Department Time Entry Approver		☐		
Web and/or Department Time Entry Superuser		☐		
Time Entry Originator Proxy Proxy Maintenance Form		☐		
Time Entry Approver Proxy Proxy Maintenance Form		☐	Add	

Save   View/Submit Request

Figure 32

5. Submit a Security Profile Request for Department Time Entry Originator

1)	In the Security Application, in the **Security Main Menu**, click on the **Banner HR-Pay** link.
2)	Click the **Time Entry** increment link.
3)	Select **Add** in the ***Action*** column for **Department Time Entry Originator.** *(See Figure 33)*
4)	Click the **Save** button.
5)	Click the **View/Submit Request** button.

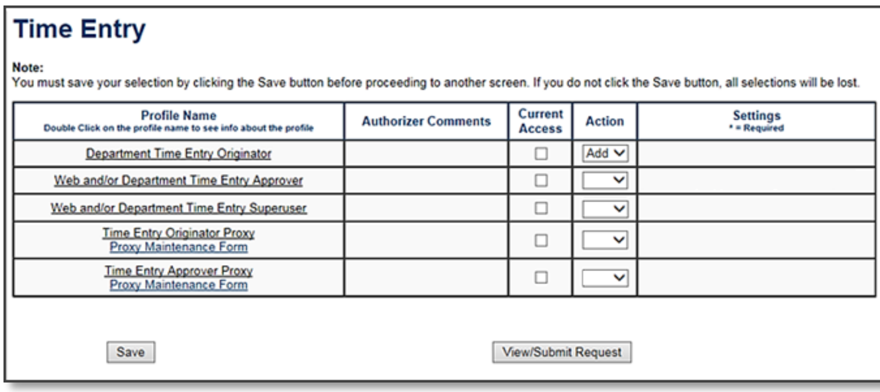


Figure 33

III. Review and Modify Time Approval Routing Queue

AITS will grant the requested security and create the time approval routing queues for the TS-Orgs in ***NTRRQUE*** in ***Banner*** based on new time entry and org security profile requests submitted by the USC in the ***Security Application***.

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

If the unit **Superuser** is unknown or unavailable, University Payroll & Benefits Customer Service can provide information on the current time approval queue(s) for the unit. Call UIC (312) 996-7200, UIUC (217) 265-6363, UIS (217) 206-7211 or email payinq@uillinois.edu.

1. Review an Existing Time Approval Routing Queue

1)	Open the **Routing Queue Rules Form** (***NTRRQUE***) in ***Banner***.
2)	Enter the **COA**.
3)	Enter the **Organization**. *Make sure the* ***Position*** *field is not populated (delete the Position if it happens to be populated).*
4)	Click the **Next Section** button.
5)	Under **Approval Category**, select **Time Entry and Approval.** *(See Figure 34)*
6)	Review the entries in the **Approver Sequence** block. Make any changes that need to be made.
7)	If any changes were made, click the **Save** button.

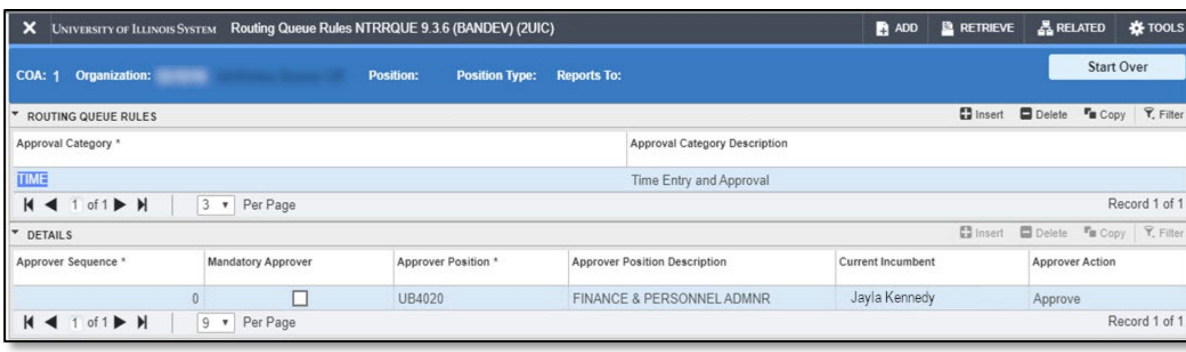


Figure 34

2. Establish Time Approval Routing Queue

If for some reason, the time approval routing queue has not yet been created, but the time entry security has been established for all roles, the unit **Superuser** can and must set up the time approval queue in ***NTRRQUE*** so employees can submit timesheets.

1)	Open the **Routing Queue Rules Form** (***NTRRQUE***).
2)	Enter the **COA**.
3)	Enter the **Organization**. *Make sure the* **Position** *field is not populated (delete the Position if it happens to be populated).*
4)	Click the **Next Section** button.
5)	Under **Approval Category**, select **Time Entry and Approval**.
6)	Type *1* in the **Approver Sequence** field, then tab to the **Approver Position** field and type the position number for the Approver. **NOTE:** The **Mandatory Approver** box should **never** be checked. If this box is checked the Routing Queue may become invalid.
7)	In the **Approver Action** field, select *Approve*.
8)	Click the **Save** button.

IV. Situations to Avoid

	Problem	Solution
1.	**Employee Web Time Entry Originators** cannot extract timesheets. **Error: "**You have no records available at this time. Please contact your Payroll Administrator if you have any questions."	The employee job record displays the wrong time entry method. Submit a HRFE transaction to correct the job record error.
2.	Unit cannot extract timesheets. A time approval routing queue has not been established for the timesheet organization. **Employee Web Time Entry Error**: "Your records cannot be processed at this time. Please contact the Payroll Department." **Department Originator Error:** *ERROR* No approval routing queue established.	Units must establish a time approval routing queue in the **Routing Queue Rules Form *(NTRRQUE)*** in ***Banner*** for the TS-Org. After the USC requests the appropriate time entry security profiles for individuals in the time approval process, the unit **Superuser** can establish the time approval routing queue in ***NTRRQUE***. See also Problem #3 regarding Error: Incumbent field will indicate "VACANT".
3	Unit cannot extract timesheets. A position selected for the **Time Approver** is no longer "active". Common reasons for a position to be no longer "active" are: • **Time Approver** has been terminated • **Time Approver** has on leave • **Time Approver** has been promoted • **Time Approver** has a new job Incumbent field will indicate "VACANT". **Employee Web Time Entry Error:** "Your records cannot be processed at this time. Please contact the Payroll Department." **Department Originator Error:** "*ERROR* Approver's position is vacant for the pay period"	Update the time approval routing queue with the new **Time Approver**'s information or the new position information for the **Time Approver**. Remember, the unit **Superuser** must notify the USC to contact AITS to establish security access for new **Time Approvers**.
4.	The **Time Approver** cannot extract their own timesheet. **Error**: "Timesheet records could not be retrieved." Common reasons for a position to be no longer "active" are: • **Override Approver** has been terminated • **Override Approver** has on leave • **Override Approver** has been promoted • **Override Approver** has a new job	The **Override Approvals Queue *(NBAJQUE)*** for the **Time Approver** is "broken". ***NBAJQUE*** will not indicate that the Override Approver's position is no longer "active" like ***NTRRQUE*** with the incumbent field showing "VACANT".

		If the **Time Approver** has an Override Approver for their timesheet and cannot extract their timesheet, go to the **Override Approver's** job record(s) in the **HR Front End (HRFE)** and confirm that the Position (job) listed in ***NBAJQUE*** is active in **HRFE** for the pay event in question. Correct the position information in ***NBAJQUE*** for the **Override Approver** or assign a new **Override Approver**.
5.	The **Time Approver**'s position contains more than one employee, e.g., pooled position. **Error**: Incumbent field will indicate "MULTIPLE".	Departments should only designate **Time Approvers** from **non-pooled** positions. The general assumption is that Banner positions will be defined on a one-to-one ratio with the exception of student and extra-help, which may be pooled.
6.	TS-Org code used for a timesheet organization has been deactivated.	A process has been established to ensure a TS-Org code is not tied to a timesheet organization before deactivating. (The possibility of this occurring is extremely unlikely.)