Banner 9 Self Service Upgrade

CHANGES TO WEB TIME ENTRY & WEB LEAVE REPORTING FOR EMPLOYEES AND APPROVERS

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Introduction
On April 3, 2024, Banner will undergo a software upgrade. The Banner “Self Service” interface is being upgraded from version 8 to version 9.

This upgrade will improve Banner Self Service functionality significantly for all Banner users. It will also help to support additional future upgrades to the Banner software. It will increase process efficiency within Banner, while providing a modern user interface.
This presentation will focus on the changes that users will encounter with reporting time via Web Time Entry, reporting leave via Web Leave Reports, and the approval process for both.
Before Starting
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This presentation is an introduction to the changes to Web Time Entry, Web Leave Reporting, and Approvals with Banner 9 Self Service. For detailed instructions on how to report and approve time and leave, please refer to the guides posted on Payroll & Tax Services website available here.
The process for setting up approval queues and proxies is being supplemented. TeamApp will remain available, and Payroll Webmaster is always available to assist. However, Dynamic Forms will be introduced to help make the approval override and approver proxy change process faster and easier. Once the new Dynamic Forms are released, guides and more information will be available on Payroll & Tax’s website.

Time and leave reporting in TimeClock Plus, EOPS, or through Manual Check Requests will remain unchanged.

Deadlines may be viewed on the Pay Schedule, as well as in the Raiderlink/Webraider portal in the Payroll & Tax section.

If you need assistance with web time entry, web leave reporting, and approvals, please contact Payroll at webmaster.payroll@ttu.edu
Web Time Entry
Web Time Entry

To access your Timesheet, within Raiderlink/Webraider, select Employee. You may also select Payroll & Tax.

Then select My Timesheet.
Select Start Timesheet for the pay period and position you wish to enter time for.
Time is displayed by workweek (Sunday – Saturday).
Select the day you wish to enter time for. Select the earn code for time you wish to report on the day selected. Enter the hours for the earn code. Hours must be entered in quarter hour increments. Round time up or down as necessary.

If you have multiple earn codes to report for the day selected, select Add Earn Code to give you the option of selecting another earn code from the drop-down list and hours to report.
Time entered may be copied. Select the day with time you wish to copy, then select the Copy button to the right of the Earn Code you wish to copy.
Web Time Entry

After time has been added and saved, selecting a day will allow you to view the Earn Code(s) and time reported for that day.
You may also select the Preview option. Preview is the most convenient way to view all time reported for the pay period. All time reported is displayed on a single page when using preview.
To adjust time saved for a day, you may select the Edit (pencil) or Delete (minus) icons. Selecting Delete allows you to delete the earn code and time selected. Selecting Edit allows you to adjust the hours, but it will not allow you to adjust the earn code.
When you are ready to submit your timesheet for approval, select Preview, followed by Submit. Timesheets must be previewed prior to submission.
A timesheet may be recalled after submission, if it has not yet been approved. Select the timesheet you wish to recall. The timesheet must have a Pending status. Once recalled, changes to time reported may be made, followed by resubmission for approval.
A timesheet may be returned by an approver for correction. The timesheet will show as Returned. You may select the comments icon to see why the timesheet was returned. You may also read comments after you have selected the timesheet for editing.
Timesheet messages may appear to warn of errors or potential problems paying time.
Web Leave Reporting
To access your Leave Report, within Raiderlink/Webraider, select Employee. You may also select Payroll & Tax.

Then select My Leave Report.
Select Start Leave Report for the pay period and position you wish to report leave for.
Leave reports are displayed by workweek (Sunday – Saturday).
Select the day you wish to enter leave for. Select the earn code for leave you wish to report on the day selected. Enter the hours for the earn code. Hours must be entered in quarter hour increments. Round time up or down as necessary.

If you have multiple earn codes to report for the day selected, select Add Earn Code to give you the option of selecting another earn code from the drop-down list and hours to report.
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Leave entered may be copied. Select the day with leave you wish to copy, then select the Copy button to the right of the Earn Code you wish to copy.
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After leave has been added and saved, selecting a day will allow you to view the Earn Code(s) and leave reported for that day.
You may also select the Preview option. Preview is the most convenient way to view all leave reported for the pay period. All leave reported is displayed on a single page when using preview.
To adjust leave saved for a day, you may select the Edit (pencil) or Delete (minus) icons. Selecting Delete allows you to delete the earn code and time selected. Selecting Edit allows you to adjust the hours, but it will not allow you to adjust the earn code.
Web Leave Reporting

When you are ready to submit your leave report for approval, select Preview, followed by Submit. Leave Reports must be previewed prior to submission.
A leave report may be recalled after submission, if it has not yet been approved. Select the leave report you wish to recall. The leave report must have a Pending status. Once recalled, changes to leave reported may be made, followed by resubmission for approval.
A leave report may be returned by an approver for correction. The leave report will show as Returned. You may select the comments icon to see why the leave report was returned. You may also read comments after you have selected the leave report for editing.
Leave Report messages may appear to warn of errors or potential problems paying time.
Approving Time and Leave
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To access Timesheets and Leave Reports, within Raiderlink/Webraider, select Employee. You may also select Payroll & Tax.

Then select My Timesheet, My Leave Report, or Employee Dashboard.
Approving Time and Leave

Accessing via My Timesheet and My Leave Report
Approving Time and Leave

Accessing via My Dashboard

[Image of Employee Dashboard showing leave balances and options to approve time or leave report]

Select Approve Time or Approve Leave Report
You will now see the Approval Menu.

Within the Approval Menu, “All Status except Not Started” is selected by default.

Below the Approval Menu, a bar graph displays total timesheets or leave reports that you may access, separated by status.
The menu may be adjusted to focus on timesheets/leave reports that fall within specific criteria.

If the status is changed and you attempt to search for an employee by name or R#, the search will only yield results if the selected status matches the current status of the employee’s timesheet/leave report.
Approving Time and Leave

To view (preview) a timesheet/leave report, click anywhere on the horizontal field of employee name, ID (R#), Organization, or Hours/Units.

You may also click on the vertical ellipses located to the right and select preview.
Leave balances are available for viewing.

Note: Leave balances for semi-monthly employees are updated after each semi-monthly payroll is processed.
Approving Time and Leave

Warnings, comments, and assigned approvers are also available for viewing.
After selecting the timesheet/leave report, you will be taken to the Detail Summary.

The Detail Summary displays all time or leave reported, and messages on a single page.
At the bottom of the Detail Summary, selecting Details allows you to view the timesheet/leave report as an employee sees it when they enter data.
Approving Time and Leave

Selecting Return takes you back to the Approval Menu.

This does not return the timesheet/leave report for correction.
There are two ways to approve timesheets and leave reports. First, you may approve each timesheet/leave report individually (one at a time).

Within the Approval Menu, select the timesheet/leave report you wish to approve.

Only timesheets/leave reports that have a status of “Pending”, “Pending – Approved”, and “Pending – In the Queue” may be approved.
Approving Time and Leave

Add comments if desired. If the time/leave reported is accurate, select Approve. The timesheet or leave report will route to Payroll for processing.

If a second level approver is designated, the timesheet/leave report will route to the second level approver for approval before routing to Payroll.
The second way to approve timesheets and leave reports is with a group approval. Within the Approval Menu, select the first timesheet/leave report you wish to approve.

Only timesheets/leave reports that have a status of “Pending”, “Pending – Approved”, and “Pending – In the Queue” may be approved.
Approving Time and Leave

Add comments if desired. If the time/leave reported is accurate, select Return.

Select the next timesheet/leave report you wish to review.

NOTE: Comments can only be added prior to approving the timesheet/leave report.
Add comments if desired. If the time/leave reported is accurate, select Return.

Repeat this process until all timesheets and leave reports you wish to approve are reviewed.
Approving Time and Leave

Select the timesheets/leave reports you wish to approve by adding a checkmark in the box located to the left of each employee’s timesheet/leave report. You may add checkmarks individually or add a checkmark for all the pending timesheets/leave reports by clicking the box next to the Pending heading.

When you have made your selection(s), and the time/leave reported is accurate, click Approve/Acknowledge. The timesheets or leave reports will be routed to Payroll for processing. If a second level approver is designated, the timesheets or leave reports will route to the second level approver for approval before routing to Payroll.
Approving Time and Leave

If errors are found during the approval process, a first or second level approver may return a Timesheet or Leave Reports for correction.

Within Pending”, “Pending – Approved”, or “Pending – In the Queue”, select the timesheet/leave report you wish to return.

Add a comment explaining why the timesheet/leave report is being returned. Then select Return for correction.
Approving Time and Leave

If errors are found during the approval process, but the employee is not available to adjust their time or leave reported, an approver may edit the timesheet or leave report.

To edit the timesheet/leave report, from within the “Pending”, “Pending – Approved”, or “Pending – In the Queue” status menu, select the timesheet/leave report you wish to edit.

From the Detail Summary page, select Details.
Approving Time and Leave

Make the necessary adjustments to time/leave reported.
Approving Time and Leave

When you have finished your adjustments, select Save. Then select Preview to go back to the Detail Summary.

Add a comment explaining why the timesheet/leave report was edited. When you are finished, and the timesheet/leave report now meets your approval, select Approve. The timesheet/leave report will route to Payroll for processing. If a second level approver is designated, the timesheet/leave report will route to the second level approver for approval before routing to Payroll.
If desired, an approver may recall a timesheet or leave report. Recall is permitted within certain conditions.

First, when the approval deadline has not passed, and the timesheet/leave report does not reflect the status of Complete.

With timesheets, when first and second level Approvers are designated, the first level Approver may recall from the second level Approver. The second level Approver may recall from Payroll. When only one Approver is designated, the Approver may recall from Payroll.

With leave reports, when first and second level Approvers are designated, the first level Approver may recall from the second level Approver. However, the second level Approver may not recall from Payroll. When only one Approver is designated, the Approver may not recall from Payroll.
To perform a recall, within the Approval Menu, select the timesheet/leave report you wish to recall. Select Recall.
You may then select Details to adjust the timesheet/leave report yourself. You may also select Return for correction to send the timesheet/leave report back to the employee for adjustment. Selecting Approve will send the timesheet/leave report back to Payroll, or to the second level approver if one is designated.
In Conclusion
This presentation is only an introduction to the changes to Web Time Entry, Web Leave Reporting, and Approvals with Banner 9 Self Service. For detailed instructions on how to report and approve time and leave, please refer to the guides posted on Payroll & Tax Services website available here.

If timesheets are not approved by the deadline, employee paychecks may be short or may not be issued. When a paycheck is short or not issued, a Manual Check Request is required.

If leave reports are not approved by the deadline, a Manual Leave Adjustment must be submitted.

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In Conclusion

Thank You