Web Time Entry
Approver/Acknowledger Training
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Overview

Objectives

Welcome to Web Time Entry training. The objectives of this training course are to:

- Introduce Web Time Entry
- Identify WTE roles and statuses
- Introduce common approval screens
- Approve time/leave step-by-step
- Discuss Proxies and Superusers
- Discuss approval options

Intended Audience

Financial Managers, Proxies/Designees and Acknowledgers
WTE Introduction

The implementation of Web Time Entry (WTE) enables employees to report their time worked and leave taken via the Spectrum Portal Web site through Employee Self Service. Employee Self Service is available 24 hours a day, seven days a week, 365 days a year. WTE is a module of the Banner Human Resources administrative system used by the University.

University of Memphis Biweekly-paid employees enter hours worked and leave usage on time sheets; monthly-paid employees enter leave usage on leave reports.

WTE Roles and Statuses

User Roles

There are a number of user roles that are assigned in the WTE module. Users may be assigned to more than one role.

Originator

The originator is the creator of the time sheet or leave report. Once an originator opens a time sheet or leave report, its status changes from Not Started to In Progress. Only the originator, or the area Superuser, can enter time and submit that In Progress time sheet or leave report for approval.

The originator can make changes to the record while the record is in In Progress, Returned for Correction or Error status. The originator may not make changes after the record has been submitted for approval.

The originator’s name is not shown on the time sheet/leave report until it is submitted, but the name is recorded. The employee’s area Superuser can review the transaction status of time sheets and leave reports at any time during the pay period, and see the originator of a time sheet/leave report.

Acknowledge

Time/leave acknowledgers are typically mid-level supervisors or timekeepers who would acknowledge the accuracy of a given set of employees within an organization. Acknowledgers may only indicate that they have reviewed the employee’s entries; they may not modify the employee’s entries or return records to the employee for correction. Action by the acknoldeger is not required for a time sheet/leave report to be processed. Approvers may approve time sheets/leave reports regardless of whether an acknowledger has acknowledged them. Acknowledgers can not assume the role of Proxy.
Approver

Approvers are typically the financial manager of an area. Approvers have the ability to modify, return, and/or approve time sheet/leave reports submitted by the originator. An approver’s action is required for the time sheet/leave report to be processed through the system. Should an approver return or modify an employee's time sheet/leave report, the approver must **promptly notify the employee** of those changes.

Proxy

As noted in the University Policy for Authorized Signatures (Policy UM1303), financial managers (approvers) may appoint academic or administrative/professional employees as their proxy for time and leave reporting. Users with a proxy role in Web Time Entry have the ability to act, and assume some privileges, for another person for approval of time and leave.

Proxies can only be assigned via a request form submitted to Business and Finance Support Services, which can be found on the Web at [http://bf.memphis.edu/forms/tech.htm](http://bf.memphis.edu/forms/tech.htm). Individuals assigned as proxies can not be assigned the role of acknowledger.

Superuser

Superusers are users who have the ability to start, submit, modify, return and/or approve time/leave records. Proxies acting on behalf of a Superuser assume the Superuser’s privileges. Therefore, the proxy can change or approve all time transactions that require the Superuser’s approval.

Transaction Status

A time sheet or leave report is assigned a status as it progresses through the WTE process. Possible statuses are:

- **Not Started:** The time sheet/leave report has not been opened for the pay period.

- **In Progress:** The time sheet/leave report has been opened for the pay period.

- **Pending:** The time sheet/leave report has been submitted for approval.

- **Error:** The time sheet/leave report may have been submitted with no hours entered or hours listed under earnings codes that do not accrue leave (i.e. military leave, voting leave, etc.). Records can also appear in error status if the employee does not have enough annual or sick leave to cover the hours entered. Any records in error status should be carefully reviewed to ensure that time has been entered correctly, if at all.
**Returned For Correction:** The time sheet/leave report has been returned for correction by the approver (or Superuser) to the originator. The necessary corrections must be made and the time sheet/leave report must be resubmitted before the pay period deadline.

**Override/Overridden:** The override/overridden status indicates that the time sheet/leave report is being reviewed and approved by the approver while he/she has assumed the role of Superuser. By assuming this role in the system, the approver is "overriding" the regular approval status. When an action is performed while assuming the Superuser role, the status will change to "overridden." Approvers may enter the system as a Superuser to gain access to additional management options.

**Approved:** A time sheet in *Approved* status indicates that the record has been successfully approved by the approver. Upon approval, time sheets will continue through the payroll process. Monthly leave usage is not tied to the monthly payroll. Upon approval, a leave report bypasses this status and goes immediately to *Completed* status.

**Completed:** A time sheet in *Completed* status indicates that the record was successfully received and processed by the Payroll Office. A leave report in *Completed* status has been successfully approved and any reported leave usage has been deducted from the appropriate leave balances.
Approval Screens Introduction

Time Approval Channel

As an approver or Superuser you are responsible for reviewing, approving, and if necessary, modifying your employees’ submitted time before the pay period deadline. If a biweekly-paid employee’s time sheet is not approved, that employee will not receive a paycheck. You can now approve time and leave records at any time (24/7), anywhere, by using a computer with an Internet connection and logging into the Spectrum Portal Web site.

Log into the Spectrum Portal. Locate the channel for Time Approval. For most users this channel will be located under the tab titled Employee.

In the Time Approval channel, time sheets and leave reports in Pending status will be listed under the appropriate timekeeping organization code. Records will not appear in the Time Approval channel until they are submitted for approval by the employee or the Superuser. If there are no records appearing in your time approval channel, then your employees have not submitted their time sheet/leave report.
If you have a record appearing under an incorrect timekeeping organization, contact HR Records for regular employees, and contact Student Employment for student workers.

Time sheets and leave reports will never be grouped together; biweekly time sheets will always appear before monthly leave reports. You may select one type of record group or the other when approving.

There are two methods of entering WTE for approvals:

1. Select (click on) a record listed in the Time Approval channel, either time sheets or leave reports, depending on which type of records you want to approve.

2. Select (click on) the **Act as Superuser** hyperlink in Time Approval Channel. Entering as a Superuser provides approvers with access to additional management options.
Department Summary Screen

Upon selecting a record, rather than entering the system as a Superuser, you are taken into Employee Self Service to the Department Summary screen. Had you entered Employee Self Service as a Superuser this screen would appear slightly different and records would be sorted in tables depending on transactions status. Entering by selecting a record displays records in one table sorted by name.

The ID column displays the employee’s Banner UID.

The Name and Position column lists the employee’s name, which you select to view the Employee Details screen and review the time sheet/leave report details. Also listed is the employee’s position number. Use this number to ensure that your employees with multiple positions are entering their time on the correct time sheet. This scenario is more common with student workers working in multiple positions under one organization or grant.

The Transaction Status column displays the current status of a time sheet or leave report. Approvers can only approve time sheets and leave reports in Pending status. Time sheets and leave reports that have not been submitted for approval will appear as Not Started, In Progress, Returned for Correction or Error.
The **Required Action** column identifies what the system believes is the next step in the WTE process. This action will say *Override* instead of *Approve* for pending records if you entered the system as a Superuser. The required action will display *Acknowledge* if your role in WTE is Acknowledger.

**Total Hours** are the total hours entered on the time sheet or leave report.

**Queue Status** displays the approval status of the record, if available.

The **Approve or FYI** column contains a checkbox for the required action. Selecting the approve checkbox for a record is one of three methods of approving time and leave records.

The **Return for Correction** column contains a checkbox that allows you to return a record to an employee for correction. This feature sends the time sheet/leave report back to the employee. The employee is not electronically or automatically notified when a time sheet or leave report is returned for correction, therefore be sure to notify the employee should you do this as using this feature could delay record submission to the Payroll Office. **Keep the payroll calendar in mind!** Employees can only access their time sheets/leave reports for a short time after the end of a pay/leave period. Be sure not to return a record that the employee would no longer be able to access.

The **Other Information** column contains hyperlinks that will take you into the employee’s time sheet/leave report record.

- **As an approver, you have the ability to make changes to an employee’s time sheet or leave report after the record is in Pending status.** Changing the time/leave record is a very powerful function and is never to be used without notifying the employee of the changes. By clicking on the **Change Time Record** hyperlink you open the employee’s actual time sheet or leave report. Once the record is accessed, the approver is taken to a time/leave entry screen in which he/she will act as the employee and make the necessary corrections to the record. Save any changes to the record, submit the record, and once it is again in a Pending status, you may then approve the record. You **are not** encouraged to ever change a time or leave record. Make every attempt to contact the employee to make changes to their record. If you make changes, leave a comment in the Comments field indicating what you changed and for what reason.

- **Comments** indicate that comments were placed on the record. Comments may be left by the employee, by the approver, and by the Superuser. When you enter a comment, place your initials after the comment to identify who made the comment through the approval process.
Employee Details Screen

Being the approver, you are responsible for ensuring that the time your employees enter on their time sheet/leave report is accurate. Before approving time sheets or leave reports, click on the employee’s name on the Department Summary screen to open the Employee Details screen.

This screen is divided into various sections spread vertically down the page.

The **Time Sheet** or **Leave Report** section displays a day-by-day breakdown of the time entered for each day of the pay period.
The **Comments** section will appear if comments have been entered on the record by the employee, approver, and/or Superuser. Ignore the Confidential indicator. Comments are viewable to everyone in the routing queue.

<table>
<thead>
<tr>
<th>Date</th>
<th>Made by</th>
<th>Confidential</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct 11, 2006 11:48 am</td>
<td>Margery S Stoever</td>
<td>No</td>
<td>Don't forget I took last Monday off.</td>
</tr>
</tbody>
</table>

The **Routing Queue** displays the name, and action and date of each person with an assigned role in the timekeeping organization. Not all names appearing in the queue may be responsible for reviewing the record.

When a record is **Pending**, only that status will display. If an action has been performed on the record, the type of action and date will be recorded. Also displayed is the originator and submitted date and time of the record.

* If an employee notifies you that he or she can see the time sheet or leave report, but cannot enter time into the record, this is the place to look to see who originated the record and whether or not it has been accidentally submitted for approval.

<table>
<thead>
<tr>
<th>Name</th>
<th>Action and Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carl F Hess</td>
<td>Originated Oct 05, 2006 01:42 pm</td>
</tr>
<tr>
<td>Carl F Hess</td>
<td>Submitted Oct 06, 2006 01:54 pm</td>
</tr>
<tr>
<td>Petricia S Munry</td>
<td>Pending</td>
</tr>
<tr>
<td>David A Parks</td>
<td>Pending</td>
</tr>
<tr>
<td>Bonnie Osborn Briggs</td>
<td>Acknowledged Oct 05, 2006 02:12 pm</td>
</tr>
<tr>
<td>Daniel M Linton</td>
<td>Pending</td>
</tr>
<tr>
<td>Melissa B Ramego</td>
<td>Pending</td>
</tr>
<tr>
<td>Margery S Stoever</td>
<td>Approved Oct 06, 2006 02:17 pm</td>
</tr>
</tbody>
</table>

The **Account Distribution** section displays the FOAPAL information related to the employee’s payroll distribution. For example, if an employee is paid a percentage from multiple grants that distribution breakdown would appear in this section.

<table>
<thead>
<tr>
<th>Account Distribution Default Data</th>
<th>Pay Period Effective Date</th>
<th>Percent</th>
<th>Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project Type</th>
<th>Cost Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep 30, 2006</td>
<td>100.00</td>
<td>110001</td>
<td>501000</td>
<td>61256</td>
<td>4600</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Also located on this screen is the third, and most recommended, method for approving time sheets and leave reports.

After reviewing the record, simply click on the **Approve** button.

From here you may also:

- Navigate back to the Department Summary screen
- Return the record for correction
- Make changes on the record
- Add comments
- Navigate to the previous or next record in the timekeeping organization
Approving/Acknowledging Step by Step

Step 1: Select either a time sheet or leave report record from the Time Approval channel in your Spectrum Portal, or select a pay period from the Approver Selection screen in Employee Self Service, to access the Department Summary screen.

Step 2: Click on the employee’s name to open the Employee Details screen.

If a time sheet/leave report is not available for approval and the time has come for it to be approved, contact the employee and ask that he/she submit the time sheet/leave report. If the employee cannot be reached, you will either need to assume the Superuser role for your organization, or locate the individual assigned Superuser capabilities in order to have the time sheet or leave report overridden. Superuser capabilities will be discussed later in this training.

Step 3: Review the daily entries to ensure time is entered correctly.

Step 4: If the time report is completed correctly, click on the approve button.

If time is not entered correctly, return the record to the employee or fix the record. Promptly notify the employee if you make corrections to a time sheet or leave report.

Step 5: Click on the Next button to view the details of the next record waiting approval in the timekeeping organization. Click on the Previous Menu button to return to the Department Summary screen.
Acting as a Proxy

To act as a proxy in your Web session, click on the hyperlink **Click here to access my leave report (monthly)** to access the Time Reporting Selection screen.

Select the individual for whom you wish to act as a proxy from the **Act as Proxy** drop-down box. If no selection is made in this box, you will be acting as “Self,” which is the default selection for this field.

If you need to assume the approver’s Superuser capabilities, select the Superuser checkbox. A proxy acting for a Superuser will assume Superuser capabilities even if the proxy would otherwise not normally have them.

Click on the **Select** button to access the Department Summary screen. Follow the approval steps mentioned previously to review and approve time sheets and leave reports.
Acting as a Superuser

If you have been designated as a Superuser within your area, you will be able to start, complete, and submit time or leave in lieu of the employee. Superusers will only be able to act in this role for their defined set of organizations; in other words, no Superuser can access time sheets and/or leave reports outside of his/her department.

When you enter Web Time Entry as a Superuser, your required action as an approver will say Override instead of Acknowledge or Approve. You may still perform the same functions; the override status is notifying you that you are in the system as a Superuser. If you approve an employee's record while in the Superuser role, the queue status will change to Overridden.

You can assume the Superuser role two ways:

- Click on the Act as Superuser hyperlink located in the Time Approval channel of your Spectrum Portal.

- Click on the Act as Superuser checkbox on the Time Reporting Selection screen of Employee Self Service.

Proxies attempting to act as a Superuser must use the second of the two options.
Other Approval Screens You May Encounter

Time Reporting Selection Screen

On the Time Reporting Selection screen, select Approve or Acknowledge Time in the My Choice column, and then click on the Select button.

If you are attempting to approve time as a proxy or a Superuser, select those appropriate fields.
Approver Selection Screen 1

There are two Approver Selection screens in Employee Self Service.

This screen will require you to select Time Sheets or Leave Reports from the Type of Records drop-down box, as well as the Pay Year, Pay ID, Pay Number, and Department if necessary.
Approver Selection Screen 2

This screen is organized by Time Sheets and Leave Reports listed by the organization number.

Choose the appropriate organization and date range in the **Pay Period** or **Leave Period** column. You may choose a sorting order for your records by clicking any option in that selection menu.

Click on the **Select** button to view the Department Summary screen.

<table>
<thead>
<tr>
<th>Department and Description</th>
<th>My Choice</th>
<th>Pay Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>U, 424000, Residence Life</td>
<td></td>
<td>BW, May 27, 2005 to Jun 09, 2006</td>
</tr>
<tr>
<td>U, 424110, Richardson Towers</td>
<td></td>
<td>BW, May 27, 2005 to Jun 09, 2006</td>
</tr>
<tr>
<td>U, 501000, Business and Finance Technology</td>
<td></td>
<td>BW, May 27, 2005 to Jun 09, 2006</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department and Description</th>
<th>My Choice</th>
<th>Leave Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>U, 501000, Business and Finance Technology</td>
<td></td>
<td>Mon, May 01, 2006 to May 31, 2006</td>
</tr>
</tbody>
</table>

**Sort Order**

- Sort employees' records by status then by Name: 
- Sort employees' records by Name: 

Select
Important Notes

- Monthly leave usage is not tied to the monthly payroll. Therefore, the moment the approver approves the employee’s submitted leave report any submitted leave will be deducted from the employee’s leave balance(s) immediately. It is highly suggested that approvers do not approve leave until the end of the month in order to keep the employee clear on the actual amount of leave they have at a given time, given that leave accruals are still tied to the month-end payroll.

- Discourage users from using the back button in the Web portal.

- Approvers should not be concerned because an employee has a potential negative balance for bereavement, military leave, inclement weather leave, jury duty, etc. The system will display these balances as a negative because employees do not technically accrue these specific types of leave. You may ignore any messages the system generates in this regard.

Contact Information

For assistance call the ITD Helpdesk at 678-8888.