

VCU Time Entry Guide Using PHATIME

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PHATIME - Time Entry Guide

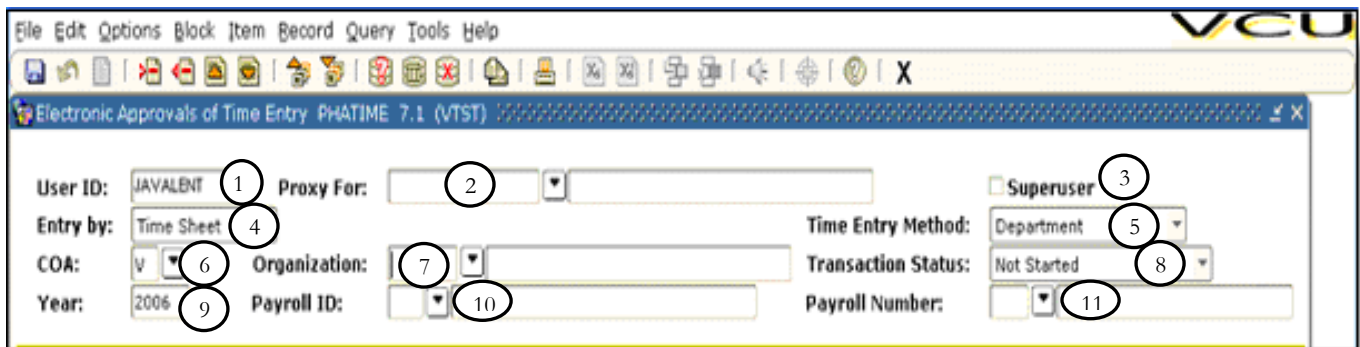
About PHATIME




P=HR Payroll, H=Time Reporting/History, A=Application

The individual who initially extracts time transactions on the Electronic Approvals of Time Entry Form (PHATIME) for a given timesheet organization, Year, Pay ID and Pay Period is considered the originator of that time record.


Once a time record has been started, only the **originator**, or their **proxy**, can enter employee time and/or change previously entered time. Time can only be entered while the pay period is open as indicated on the Payroll Calendar. Click the Payroll Number Search Icon to display the calendar.

1. Log in to Banner Forms INB: <http://www.eservices.vcu.edu> or <http://www.banner.vcu.edu>
2. Key **PHATIME** in the **Go To** box and press Enter to open the *Electronic Approvals of Time Entry Form*.



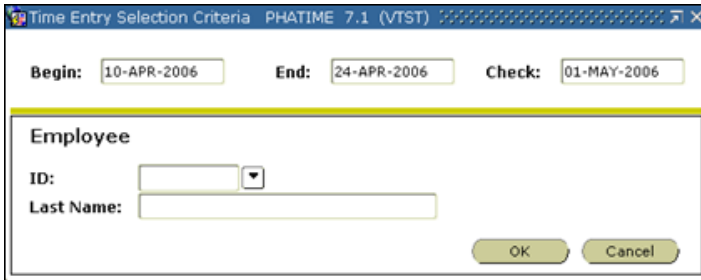
Field	Value
1. User ID	Your eID will be displayed
2. Proxy For	If YOU are acting as a Proxy for someone, enter the other user's ID, or search using the search function icon () on the right hand side of the <i>Proxy For:</i> field. If an ID is entered, press Tab and their name will be displayed <i>Otherwise, leave blank.</i>
3. Superuser	Tab past field. <i>Not used.</i> Leave blank.
4. Entry by	TAB past the field. <i>Leave Timesheet as the default value.</i>
5. Time Entry Method	TAB past the field. <i>Leave Department as the default value.</i>
6. COA	TAB past the field. <i>Leave V as the default value.</i>
7. Organization	Enter the desired Time Sheet Organization code to report time for, or use the Search icon () on the right hand side of the field. Press Tab.
8. Transaction Status	Select Not Started to see all timesheets that have not been started. Select In Progress status if you have already started reporting time for an Organization for this Payroll Number.
9. Year	TAB past the field. <i>Leave the Current Year as the default value.</i>
10. Payroll ID	Enter SM for Semi-Monthly
11. Payroll Number	Enter the desired OPEN Payroll Number, or view the Payroll calendar and the correct number, located at http://www.hr.vcu.edu/payroll/index.htm or use the Search icon () STOP! Do NOT press Enter or Tab! See next section!

While the cursor is in the Payroll Number field, there are two ways to proceed:

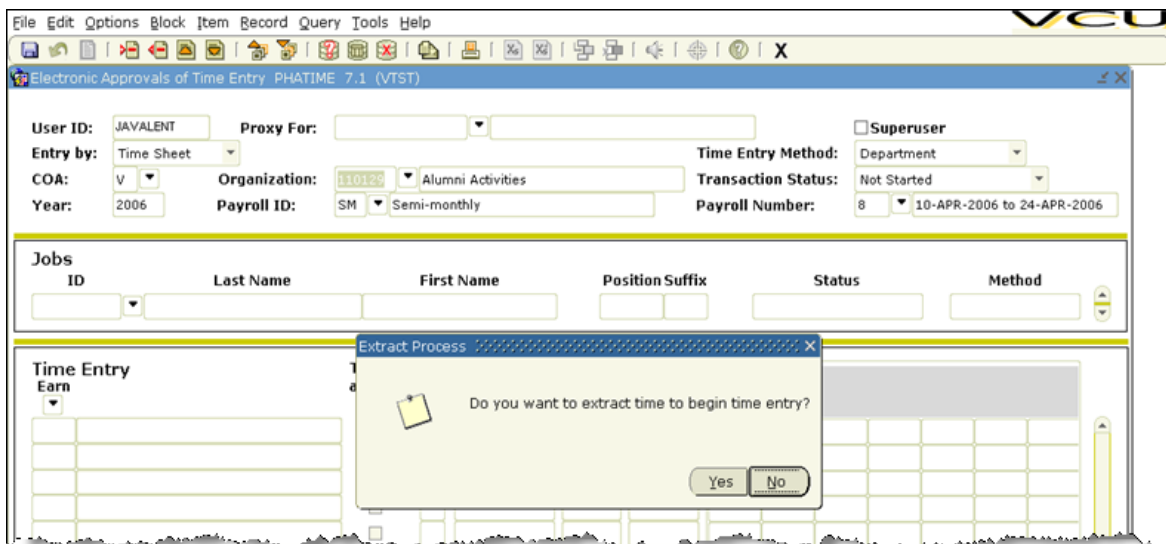
- To extract time for **ALL** employees associated with the desired Timesheet Organization, click **Next Block**, ( or Ctrl/PgDn). Go to step 3 next.

OR

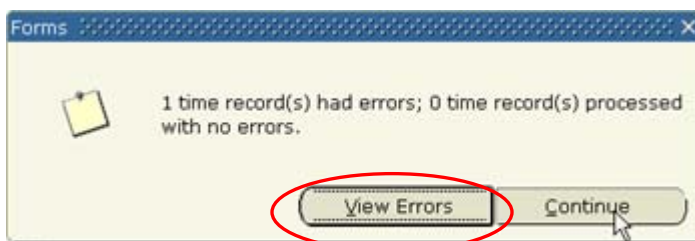
- To enter a **specific** employee time record,
 - Press **TAB** to open the *Time Entry Selection Criteria* window shown below:



- Enter the employee VID number, and click **OK**. Go to step 3 next.
- Click "**Yes**" when the message "Do you want to extract time to begin time entry?" appears.



When the extract has completed, a message is displayed indicating how many records (employees) processed successfully and, if any, how many processed with errors.



If any errors, click the *View Errors* button, to display the Pay History Display Errors Form.


(PHIDERR - To exit this form, click **X** or Ctrl + Q, to return to PHATIME)
Contact Payroll about errors if necessary. See Error section later in this document.


If **no** errors, click **Continue** to move to the **Jobs** block and access the time records.

Time Entry

In the *Jobs* block, ALL employees in the entered Timesheet org will be accessed one at a time, in alphabetic order. The Transaction Status will now be *In Progress*.

Select/click on the desired employee's VID in the **Jobs** block.


Click **Next Block**, ( or Ctrl/PgDn) to navigate to the **Time Entry** block.

In the Time Entry Field	Value
1. Earn	Enter the <i>Earn/Leave</i> Code or use the search icon () to query. <i>Note: only the eligible earn codes designated to be entered for this employee's "employee class" will be available for entry selection. Be careful with VSDP/Traditional</i>
2. Time In/Out	Tab past the field, not used.
3. Shift	Tab past the field, not used. Leave 1 as the default value. Do NOT change!
4a. For Pay Period Exception Time Only employees	TAB or use the mouse to navigate to the appropriate day and enter the number of exception time hours for each day, for each <i>Earn</i> code in the daily breakdown area. (Classified Non-Exempt, Classified Exempt, Faculty, Grad Asst., Post Doc., Adjunct).
4b. OR, For Pay Period Time Sheet employees	TAB or use the mouse to navigate to the appropriate day and enter the total number of hours worked for each day, for each <i>Earn</i> code in the daily breakdown area. (Hourly, Student Workers, Work Study)

5. **Save** ( or F10)

6. To enter additional *Earn/Leave* codes, enter a new record by selecting **Record > Next** (or, by using the **Down Arrow** on your keyboard) and repeat steps 1-5 above.

Special Time Entry Instructions:

1. For Hourly, Student and Work Study, you must enter EACH day's hours **worked**.
 - **REG** is the code for Hourly, Student Worker, and Work Study.
2. For Hourly, Student and Work Study, if overtime occurs, all hours are entered as regular code
 - System will calculate overtime pay hours greater than 40
 - Overtime is charged to the PRIMARY job's Index code
3. For Hourly, Student and Work Study employees with multiple jobs, a weighted average pay rate will be calculated for the Overtime rate and charged to the Primary job.
4. For Classified, overtime hours must be entered with **OT1** (Straight time) or **OT2** (1.5 time)
5. For Classified with multiple jobs, with overtime, a weighted average pay rate will be calculated by Payroll, and manually adjusted in a future pay cycle.
6. Dock hours will be entered as actual hours to be docked
 - *Temporary procedure:*
 1. Payroll will be adjusting these hours to calculate the correct rate until a permanent solution is determined
 2. Employees will not necessarily see the same number of hours in Banner Self Service pay information as DOC hours, but the amount will be correct
7. **NEW EMPLOYEES:** If you have new employees added to your timesheet code AFTER you extracted the time records: Go to the Key Block, choose NOT STARTED again for the Transactions Status and choose YES to extract time again. This will NOT erase any previously saved time, just extract the NEW employees.
8. **RETURNED FOR CORRECTION:** Follow this procedure if Payroll has notified you that your timesheet organization time records were **returned** to you **for correction**.
 - **Enter**/select the following in the Key Block:
 - i. **Entry by:** Timesheet (default)
 - ii. **Time Entry Method:** Department (default)
 - iii. **COA:** V (default)
 - iv. **Organization:** Enter your timesheet organization code
 - v. **Transaction Status:** Choose either "**Return for Correction**" to just see the returned records or "**All Except Not Started**" to see ALL records, regardless of status
 - vi. **Year:** Current Calendar Year (default)
 - vii. **Payroll ID:** SM (Only One!)
 - viii. **Payroll Number:** Enter the current pay period number again
 - **Next Block**, ( or **Ctrl/PgDn**).
 - In the Jobs Block, look at the records with the status of "**Return for Correction**" and enter the corrections.
 - Be sure to **SAVE** and then **SUBMIT TIME FOR APPROVALS** again for each record returned!



Miscellaneous Actions:

Viewing Leave Balances

- HR recommends viewing an employee's **leave balances** before entering leave time.
 - a. In the Jobs block, click the desired employee.
 - b. In the Menu Bar, click *Options > List Leave Balances*.
 - c. A pop-up window will display all associated leave and balances.

To open PHJETIM (Time entry query screen)

and view a list of all employees in desired Timesheet Organization, their pay record status, and the total hours entered.

- a. In the **Jobs block**, click the **Search** icon () beside the ID field,
- b. To exit and return to PHATIME, click  or Ctrl + Q.


To delete/remove a single Earn/Leave Code entry line:

- a. In the *Time Entry* block, click on the Earn code to remove
- b. In the Menu Bar, click *Record > Clear*, or, *Record > Remove*.

To restart Time for an employee: (Remove all Earn codes and time entry that is saved but not submitted.)

- a. In the Jobs block, click on the desired employee's VID.
- b. In the Menu Bar, click ***Options > Restart Time for Employee***.
- c. When asked if you want to Restart this transaction, click **Yes**.
- d. Click **OK** in the Reextracting Time entry pop-up window.
- e. **All** Earn code records entered will be removed.

Enter Comments (Optional field):

- a. To enter or view comments, in the Menu bar, click ***Options > View/Enter Comments***
- b. Click **Previous Block** ( or Ctrl/PgUp) to return to Time Entry block.

To determine who is the originator of a time transaction,

- c. With the cursor in the Jobs block, click ***Options > View/Change Routing Queue***
- d. The originator of the transaction is displayed in that window.
- e. In the Menu Bar, click ***Options > Time Entry Data***, to return to the Time Entry/Job ID block.

Labor Distribution Override:

Banner payroll processes will use the default FOAPAL labor distribution and associated percent allocation attached to the job assignment, to charge the payroll expenses.


A process to change a job’s future or retroactive labor distribution outside of PHATIME is an ePAF or PHAREDS for funding changes. See separate guides on the HR web page for those instructions.

To override the current Labor Distribution for a desired day & amount of hours

For example, for an eight-hour day, if four hours should be charged to a different Index, only four hours and the new Index code need to be keyed in the override area.

In the **Time Entry** block,

- Cursor must be in the desired **day** for the labor distribution override.
- **Key** in the total number of hours worked for that day.
- Click **Options>View or Override Labor Distribution**
- Enter necessary hours that pertain to the override and the new Index code.
- Within the labor distribution window, only the hours and specific FOAPAL components that **differ** from the default shown in the top of the window need to be entered.
 - Note: If you need to split the distribution between two Index codes, key the desired hours in the **Hours or Units** field for each Index code.

- **Save** ( or F10) when keying is complete

- Click **Previous Block**, ( or Ctrl/PgUp) to return to previous block of PHATIME

- ****DO NOT** click Exit or you will close the PHATIME form and have to start over.

Submit Time

- You only submit time for employees that had hours worked entered or exception time taken.
- If a Classified or Faculty employee had no exception time or did not work a holiday, you do **not** have to submit their time record. They will be paid automatically.
- Holiday time will be paid automatically. NO entry is necessary!
 - a. If an employee worked a holiday, Enter **HLA**, ONLY if they WORKED that holiday!
- At any time, on any employee, you can save changes, exit the form, and return at another time, or, if all entry is complete, you can submit their time for approvals.
- **When time is submitted, no further editing can be done for that employee's time record!**
- Each employee's timesheet record must be submitted **individually!** (One at a time, if time was entered!)
- You can submit time ANYTIME your entry is complete, and the time files are open for entry!
 - a. You do NOT have to wait until the last day!

The Timekeeper is responsible for ensuring accuracy of entry and validating time to the source time sheet that was submitted by the employee and supervisor. It is recommended that the total of timesheet documents be summed and reconciled to all entries made in Banner via the PHJETIM form, which is explained later in this document.

To submit the time entry record to Payroll for approval into the Payroll process:



While the cursor is in the *Jobs* or *Time Entry* block:

1. Click **Options > Submit Time for Approvals**.
2. The transaction status will change to "*Pending*" for that employee record and no further entry/editing is allowed.
3. *Contact Payroll if any changes or corrections are needed after submission. 804-828-0740.*

To move to the **next employee's time record**:

- a. While in the *Time Entry* block, click **Options> Access Next Record**

OR,

- b. Click **Previous Block** ( or Ctrl/PgUp) to return to the Jobs/Employee ID block.
 - i. Use **arrow** keys to select/click on the desired employee in the *Jobs* block.
 - ii. **Next Block** ( or Ctrl/PgDn) to navigate to the Time Entry block

PHATIME Options Menu:

PHATIME Menu "Options"	DESCRIPTION
Access Next Time Record	Move to the Next employee time record without having to return to the Navigation frame.
Access Previous Time Record	Move to the Previous employee time record without having to return to the Navigation frame.
Approve Time	Payroll use only.
Acknowledge Time	Not currently used.
List Leave Balances	Displays the current leave balances for the employee.
Restart Time for Employee	Removes all time entries and allows the user to start over for that employee, before entry has been "submitted for approval". Once a transaction has been submitted for approval, no further action can be made.
Return Time for Correction	Payroll specific
Submit Time for Approvals	Submits time to Payroll for approval. Changes the Transaction Status from "In Process" to "Pending".
View/Change Routing Queue	Used to view the originator of the time record.
View Errors	Use to view all errors associated with the employee ID number in Pay History Display Errors Form PHIDERR .
View/Enter Time In and Out	Not currently used.
View/Enter Comments	Use to view or enter comment text.
View/Override Labor Distribution	See separate description

PHATIME Transaction Status

Transaction Status	Description
Not Started	Transactions that have not been extracted for time entry.
In Progress	Transactions that have been extracted and await time entry, or completion of time entry.
Pending	Transactions that have been submitted to Payroll for approval. Time entry has been completed for these time transactions. After a time sheet is submitted for approval and the status is Pending, only Payroll can make adjustments or corrections to that record!
Approved	Transactions that have been approved by Payroll.
Completed	Timesheets are given a "Completed" status when the Payroll Process is run for normal payroll processing.
Error	"Error" transactions are those time transactions with problems that need correction. Time transactions can go into "Error" status when submitted for approval, and during the approvals process. All errors generated can be viewed using the "View Errors" option in the Navigation frame of this form; the Pay History Display Errors Form (PHIDERR) is the form accessed to see the errors.
Return for Correction	"Return for Correction" is not a user function.
All (except Not Started)	"All (Except Not Started)" includes all transactions that are in "Approved", "Completed", "Error", "In Progress", "Pending" or "Return for Correction" status.

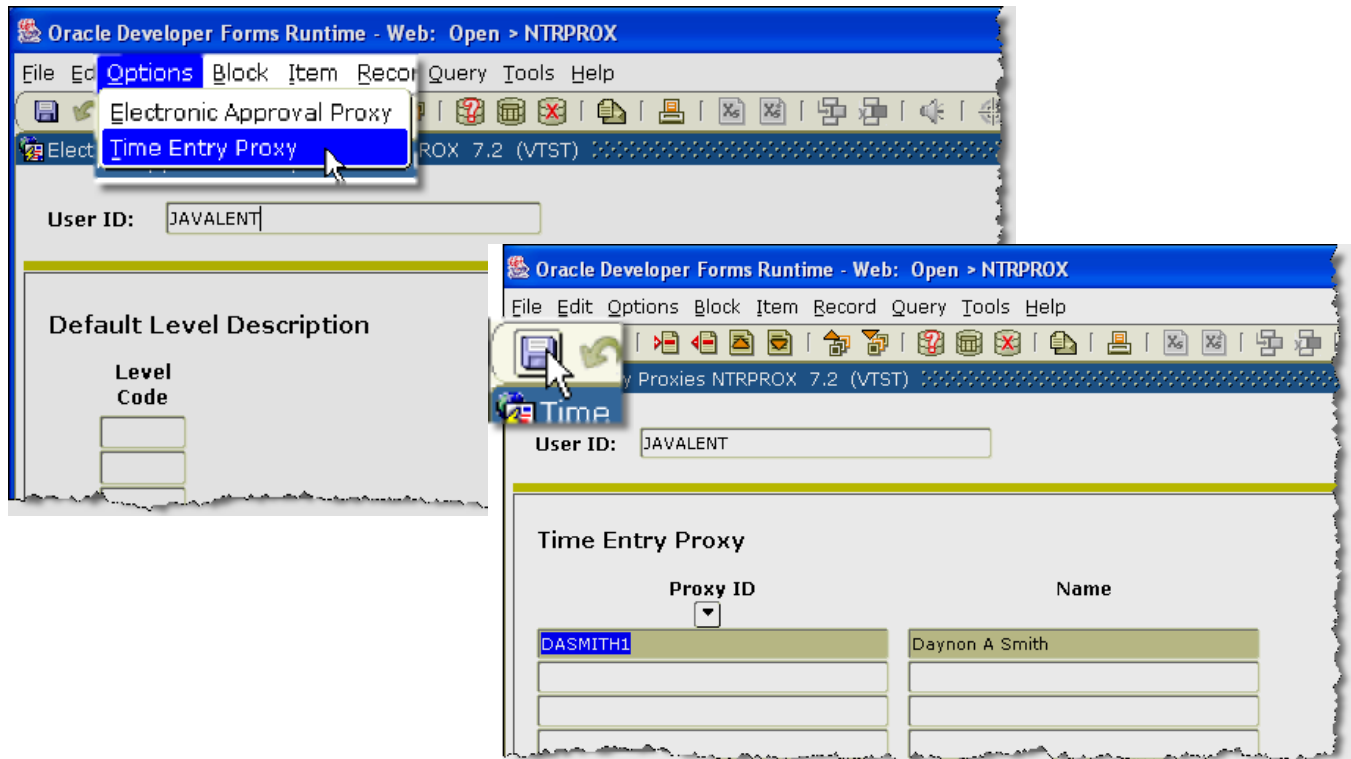
Error Messages



<p>*Error* You do not have security privileges to see the records.</p>	<p>You do not have Human Resources security privileges to see the records requested with information entered in the Key Block. Contact HR.</p>
<p>*Error* Hours or Units must be entered, or the records should be removed.</p>	<p>The earn code record is partially created when the Earn code is entered in PHATIME. The hours/units and days/special rate must be completed before you can exit the line in the Earnings block. If you do not want to enter time for that Earn code, use Record Remove to delete the record.</p>
<p>*Error* There were no employees available for extract.</p>	<p>Possible conditions can cause this error message:</p> <ol style="list-style-type: none"> 1. There are no PHATIME records for that payroll with a Transaction Status of <i>Not Started</i>. <ul style="list-style-type: none"> • Query the Transaction Status of <u>All (Except Not Started)</u> to see if transactions exist already for this pay event. 2. The wrong time entry method has been entered in the selection criteria block. <ul style="list-style-type: none"> • Verify that <u>Department</u> is selected as the Time Entry Method. 3. The wrong timesheet org has been selected for the pay event. Verify the Key block information is correct.
<p>*Warning* Pay Period is not open for time entry.</p>	<p>The pay period is not open or is closed. Check the Payroll Processing Schedule for the Pay Period Time Entry Dates at http://www.hr.vcu.edu/payroll/index.htm</p>

NTRPROX – Electronic Approval Proxy Rule Screen

How to Add a *Time Entry Proxy Record*

N=position control, T=validation/rule, R=rule/process



1. Log in to Banner
2. Key **NTRPROX** in the **Go To** box and press “**Enter**”
3. The Electronic Approval Proxy Rule Screen (NTRPROX) will open and your User ID will display in the User ID field. You cannot change this field.
4. In the menu bar, click **Options>Time Entry Proxy**
 - You may get a warning, **No Records Retrieved**, the first time you select Time Entry Proxy. Click **OK**.
5. In the Proxy ID field, enter your proxy’s Banner ID (eID), not yours.
 - Press **TAB** to populate the proxy’s Name field.
6. **Save** ( or F10)
7. Click **Record>Remove**, to remove a Proxy ID
8. To exit, click  or Ctrl + Q


Proxies stay as proxies until YOU remove them!

Possible reasons for errors:

Be sure the proxy has a Banner ID and the appropriate security access in addition to you entering the correct ID. You may need to wait until the setup process is complete for your desired proxy. Please Contact HRBanner@vcu.edu with any questions.

POIIDEN – Employee Search Form



To Search for an Employee:

1. Key **POIIDEN** in the *Go To* box and press *Enter*.
2. Verify the **Case Sensitive Query** Switch is Yes or No. (Near bottom of screen)
3. Key: the exact ID, or Last Name, or First Name, or Middle Name of the desired employee.
OR
 Enter **part** of the ID, Last Name, First Name, or Middle Name and replace the unknown part with a wildcard character (Percent sign %). *See chart below for examples of how to use the wildcard.*
4. **Execute Query** ( or **F8**) to start the search.



To get these name results...	Enter these criteria...
McDonald or Mac Donald	m%c%don%
O'Connell (apostrophe), or O Conell (space), or Oconnel (no space)	o%con%
All Entities that contain ma (anywhere)	%ma%
All Entities that begin with ma	ma%
All Entities that end with ma	%ma
All Entities that have m as a second character	_m%
The Colonial Equipment Company, or any company with Colonial in its name.	%colonial%
Search for any and all abbreviations like St% for Saint, Fed%Ex% for Federal Express, or U%P%S% for United Parcel Service. Try searching with abbreviated words such as Equip% for Equipment, and Svc or Serv% for Service. Enter a birth date, if known, to further narrow the search results.	

To Use the Soundex Feature of Banner:

Use this window to request a list of names that sound like the one you enter. If you are not sure of the correct spelling of a name, enter it here. The system searches the Human Resources database for names that are phonetically related to the name you enter. It displays possible matches on the main window of this form. Use the Soundex block to search for information based on the sound of the word.

1. In the POIIDEN screen,
2. Key any part of the ID, Last Name, First Name, or Middle Name and replace the unknown part with a wildcard character. (Percent sign %). *See chart above.*
3. **Execute Query** ( or **F8**)
4. If you have not retrieved a name, select **Options>Soundex on Last and/or First Names**.
5. Enter the Last Name, First Name, or both that sound like the name you want.
6. **Execute Query** ( or **F8**) to display all matches that sound like the one you entered.

To start a new employee search query:

1. Click **Cancel Query** ( or **Ctrl+Q**) once to cancel the query
2. Click **Enter Query** ( or **F7**) to start a new query.

Change Indicator Field



This screen displays any change history and type of change made to the current identification record of the employee. This does NOT indicate a duplicate record!

Values can be:

"N" = Name Change, **"I"** = ID Change, (Null or blank) = This is the current record.





Query Forms

The following forms are query forms to view various information about employees and payroll information.

1. Key the form name in the *Go To* box and press *Enter*
2. Enter the required information in each form's Key Block area:
3. Enter the V ID of the desired employee or other key information
 - If the V ID is not known, use the **Search** function ( - drop down arrow) on the right side of the ID field. See the search instructions for POIIDEN above.
4. Click Next Block, () or Ctrl/PgDn) to navigate to the form's Information Block/s.

NBAJOBS	Employee Job (combination of HRS 101-102 and 981 screens)	Displays position number, job effective dates, job title, timesheet organization, FTE, compensation, and labor distribution (budget) information.
NBIJLHS	Labor Distribution Change History	Displays Labor Distribution accounts history. Click <i>Options > View Effective Dates</i> to see account change dates
NBIPINC	Position Incumbent Inquiry	View Employees by Position
PEAEMPL	Employee Information (similar to HRS 101screen)	Displays employee class, status, Home organization, leave category, benefit category, and service dates.
PEALEAV	Employee Leave Balances (similar to HRS 965 screen)	Displays employee's eligible leave time balances.
PEIJHIS	Employee Job History	Displays employee job history, pay rates, annual salary and position in one screen. Start and end dates, status, hours, personnel change date, job location, supervisor, and salary information. No Options available.
PEIEHIS	Employee History	Employee History information
PHIETIM	Web Dept Employee Time Inquiry Form	This displays the time entered for a desired TS Org and Pay number AND status of time records.
POIIDEN	Employee Search	Form used to find the VID of any employee in Banner.
PHILIST	Pay Event List	Displays gross and net pay details about paychecks processed for an employee.
PEISALH	Employee Salary History	Displays the primary and overload positions for a specified employee. Related job information from the Employee Jobs Form (NBAJOBS) defaults here for each position.

PHATIME Quick Bytes:

1. Log in to Banner INB
2. Key **PHATIME** in the Go To box and press "Enter"
3. Your VCU eID displays in the top left corner of the form.
 - a. If you are acting as a proxy, indicate that VCU eID in the **Proxy For:** field.
4. Enter/select the following in the Key block:
 - a. **Entry by:** Timesheet (default)
 - b. **Time Entry Method:** Department (default)
 - c. **COA:** V
 - d. **Organization:** Enter the time sheet organization code
 - e. **Transaction Status:** Not Started
 - f. **Year:** Current Calendar Year (default)
 - g. **Payroll ID:** SM
 - h. **Payroll Number:** see Payroll Calendar <http://www.hr.vcu.edu/payroll/index.htm>
5. Click Next Block, ( or Ctrl/PgDn).
6. The message displays "Do you want to extract time to begin time entry? Click Yes.
7. Once the extract is complete, a message displays that indicates how many transactions/employees processed successfully and the number of errors, if any.
8. Click **Continue** in the pop-up message window to begin time entry.
9. Select/click desired employee ID from Jobs block. Use arrows on right side to scroll through employees.
10. Click Next Block, ( or Ctrl/PgDn), to move to Time Entry block.
11. Enter Earn Code and appropriate hours by day.
12. Click Save ( or F10).
13. Click *Options>Submit Time for Approvals* for each employee, if you entered hours or exception time.
14. To exit, click  or Ctrl + Q
15. Timekeeping is complete.
16. Check Submit status on the PHATIME form.