Logging into Banner 9

1. Go to http://bannerdev.cunet.carleton.ca. If off-campus, you must first be connected to Carleton's VPN.
2. Under the Banner 9 Application Navigator (3rd Column), click 'PROD App Nav' and sign in with your MC1 credentials.
3. Use the search bar to go to PHATIME (Electronic Approvals of Time Entry).

Entering Criteria in PHATIME

4. In PHATIME, enter in the following information:
   - Proxy For: Leave blank (but if proxying - type the MC1 username of the leave approver)
   - Entry by: Leave Report
   - Time Entry Method: Department
   - Organization: Your department org number. *If one or two digits, add zero(s) in front (i.e. 055)*
   - Transaction Status: Not Started.
   - Year: Current year
   - Payroll ID: LV *(this must be done before entering in the Payroll Number)*
   - Payroll Number: Number of the month (1-12) you are submitting leave for.
5. Click Go and select Yes to the "Do you want to extract time to begin time entry?" dialog box. This will start the leave reporting process, and change all employee statuses from "Not Started" to "In Progress"
6. Click Continue on the "Time Record(s) processed with no errors" dialog box. If you receive an error message, contact humanresources@carleton.ca

Note: If there is no monthly leave to report (i.e. no one in the department took any days), complete steps 1-6 and exit the form (leaving all employee statuses as "In Progress"). There is no requirement to submit/approve instances of 0 hours.

Submitting Time for Approval in PHATIME

Our recommended first step is to display as many entries on the same page as possible. The default setting is to show 5 employees per page, but this can be increased up to 50. At the footer section of the "Jobs" section, there is an option to go between pages as well as an option to view more entries per page (5, 10, 20, 30, 40, 50). We recommend showing more entries per page as this will greatly simplify the approval process.

7. To begin reporting time, click the first employee to select them, and then double click the first box under 'Earn *' in the 'Time Entry Leave by Hour' section below.
8. Enter in the leave code, or click the 3 dots (More Options) to display the Leave Code list and select from there:
   - 250 (Vacation Time
   - 255 (Sick Leave)
   - 258 (Special Leave)
   - 259 (Bereavement Leave)
   - 339 (Overtime leave taken)
9. Add up the total # of hours (not days) of leave taken for the month and input under the 1st day (01) of the month
   - Example: if 3.5 days were taken in September, put 24.50 (7.00 hours/day x 3.5 days) under Tue, Sep 01
   - HR does not track which specific days are taken as vacation in PHATIME, so it is not necessary to put the hours under the specific days they are taken. The 2nd day of the month column is used to report leave as a late entry from the previous month if missed (see last section of this guide).
10. Click the 'Save' button in the bottom right corner

11. If the employee took more than one type of leave during the month - use the "Insert" button on the right-hand side of the "Time Entry Leave by Hour" section to add a new row. Repeat steps 7-10.
12. Once the employee's leave information has been input correctly, click 'Tools' (in the top right corner of the Banner menu), scroll down to the 'Options' section and click 'Submit Time for Approvals'. This will submit the entry, and change the employee's transaction status to 'Pending'
13. Repeat steps 7-11 for all employees who have leave to report
    - Accidentally submitted information that is incorrect? Select the employee, open up the 'Tools' menu, scroll down and select 'Return Time for Correction'. This will allow you to edit and resubmit the entry.
    - <u>Do not 'Submit Time for Approvals' for employees who did not take leave.</u> Leave their entries blank and 'In Progress', there is no need to submit/approve 0 hours.

Approving Time in PHATIME

If you are continuing from the previous step and the employee has disappeared from your list, this is because your original search criteria pulled employees with Transaction Status: "Not Started". Now that the employee is "Pending", they no longer meet the search criteria. You will need to click the "Start Over" button in the top right-hand corner and change the search criteria. Keep the same criteria as before, but set Transaction Status: "All (except Not Started)". You should now be able to see all employees that you have opened time for.

14. Click the employee you wish to approve time for. Their transaction status should state 'Pending'.
    - To see their leave balances before approving, click 'Tools', scroll down to the 'Options' section and select 'List Leave Balances'
15. Click 'Tools', scroll down to the 'Options' section and select 'Approve Time' *(Ensure hours are validated before approving).* This will approve the entry and change the employee's transaction status to 'Completed'.
16. Repeat steps 14-15 for all employees who have leave to report
    - Accidentally approved information that is incorrect? Email payroll@carleton.ca with the correct info (employee banner ID, employee name, correct hours).
    - Once you are done approving entries, final employee statuses should be either 'In Progress' (for employees who did not take leave) or 'Complete' (for employees who did take leave)
17. Click 'Save' and exit the form

Keep in mind that the leave reporting deadline is at the end of the day of the 16th day of the month. If the 16th falls on a weekend or holiday, the reporting deadline is the previous business day.

Submitting Leave Information from the Previous Month (if missed)

If you were not able to submit leave information on time during the previous reporting period, it will need to be reported as a late entry the following month.

- Follow steps 1-17 to report leave for the current month as usual (inputting leave information the 1st day column)
- For the previous month's information, input that leave information into the 2nd day column
    - Example: if you were reporting September's leave in October, and an employee took 2 vacation days in each month, you would put 14.00 hours under Oct 01, and 14.00 hours under Oct 02.
- Click 'Tools', scroll down to the 'Options' section and click 'View or Enter Comments'
- Enter comments to confirm/clarify late entry (i.e. "Submitting 14.00 hours of previous month's annual leave under Jun 02 column as a late entry")