

## Web Time Entry From Start to Finish

Presented by: Sheli Senecal  
Smith College  
April 12, 2010  
Course ID 0025

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### Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

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### Agenda

- Introduction – Just The Facts
- In the Beginning...
- Execution of the project
  - Communication
  - Systems
  - Testing
- Implementation of the project
  - Rollout
  - Training
  - Maintenance.....don't get blindsided
- Completing the project

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### Introduction – Just The Facts

- WTE project initiated in January, 2005
- Smith College has;
  - 400 Exempt Staff
  - 200 Non-Exempt Staff
  - 300 Service
  - 300 Faculty/Course Support
  - 2500 Students
- We went live;
  - Non-Exempt staff in August, 2005.
  - Student all started in September, 2005.
  - Exempt staff were transitioned in November, 2005.
  - Service staff and Faculty are not using WTE.
- Banner System;
  - Started WTE on 6.0; migrated to 7.0 in December, 2005; upgraded to 8.0 in November, 2009

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### In The Beginning...

*Analyze & Define*

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### Analyzing the Project

- Evaluate the feasibility of WTE and know why you are implementing it.
- Identify key stakeholders to get the buy-in needed for a successful project.
- Know your community and the impact of this new process.
- Define the scope of the plan (why, who and when).
- Have a realistic go live date.
- Select a team that is reflective of the population that will be using WTE.

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### Defining the Project

- Identify key issues.
- Proactively manage the tools and resources you have for this project and assign tasks accordingly.
  - Communication
  - Systems
  - Testing
  - Rollout
  - Training
  - Maintenance
- Create time-lines for the individual tasks and then put your project time-line in place. This will get you to your implementation date.
- Know your deliverables!

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### Executing The Project

*Communication, Systems & Testing*

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### Communication

- Although your main goal is to implement a new process, communication should be the first priority.
- Start with an initial communication about the process, its impact and go live date.
- Setup open demo sessions so people can see the new product and send out "Are You Ready" checklists.
- Follow-up with on-going communications as you go through testing and can start to spell out exactly how certain issues will be handled.
- End with specific rollout details of how and when.

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## Systems Setup

- In order for WTE to work there needs to be form specific setups in Banner and the WTE module needs to be turned on in Employee Self-Service.
- System setup involves;
  - rule and validation forms
  - employees' job information
  - approval routing
  - security setups
  - WTE notifications
  - Banner Self-Service
  - Good-to-Knows
  - Known Defects

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## Systems (Rule & Validation Forms)

- PTRPICT – Payroll Identification Code Rules
- PTRINST – Leave Processing Rules
- PTRSHFT – Shift Premium Rules
- PTRCALN – Payroll Calendar Rules
- PTRECLS – Employee Class Rules
- PTRLCAT – Leave Category Rules
- PTVLCAT – Leave Category Validations
- NTVACAT – Electronic Approval Category Code Validation

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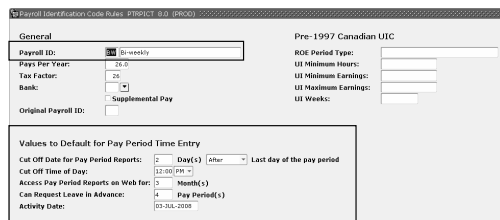
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## PTRPICT – Payroll Identification Code Rules



Payroll Identification Code Rules - PTRPICT 0.0 (PR00)

General

Payroll ID:

Pay Per Year:

Tax Factor:

Bank:

Original Payroll ID:

Pre-1997 Canadian UIC

ROE Period Type:

UIC Minimum Hours:

UIC Minimum Earnings:

UIC Maximum Earnings:

UIC Weeks:

Values to Default for Pay Period Time Entry

Cut Off Date for Pay Period Reports:  Day(s)  Last day of the pay period

Cut Off Time of Day:

Access Pay Period Reports on Web for:  Hour(s)

Can Request Leave in Advance:  Pay Period(s)

Activity Date:

This setup must be done for each Payroll ID in use.

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Installation Rules: PTIMESET 6.1.2 (RMC)

Installation: ☒ Leave ☐ COBRA or FMLA ☐ California Pension or MS ☐ Faculty ☐ One-Time Payment

Leave Processing Method: ☐ By Employee  
☒ By Job

Leave Processing Order: ☐ Accruen Then Take  
☒ Take Then Accruen

Leave Accrual and Maximum Calculated using: ☐ Job Appointment Percentage  
☒ Job FTE

Minimum Leave Day Increment:

Leave Balance Roll Order: ☐ Roll balances Before Usage and Accrual  
☒ Roll Balances After Usage and Accrual

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Payroll Calendar Rules: 8790CAL (00000)										
Year	Payroll #	Payroll # Number	Pay of Month	Start Date	End Date	Check Date	Web and Department Time Entry From Date	Time Entry To Date	Time of Day to Stop Time Entry	
2010	W	1	1	01-JAN-2010	01-JAN-2010	01-JAN-2010	01-JAN-2010	01-JAN-2010	12:00 PM	
2010	W	2	2	03-JAN-2010	16-JAN-2010	22-JAN-2010	03-DEC-2009	19-JAN-2010	12:00 PM	
2010	W	3	1	17-JAN-2010	17-FEB-2010	17-FEB-2010	20-DEC-2009	01-FEB-2010	12:00 PM	
2010	W	4	2	18-JAN-2010	17-FEB-2010	17-FEB-2010	17-JAN-2010	29-FEB-2010	12:00 PM	
2010	W	5	5	14-FEB-2010	17-FEB-2010	05-MAR-2010	14-FEB-2010	01-MAR-2010	12:00 PM	
2010	W	6	2	28-FEB-2010	17-MAR-2010	18-MAR-2010	14-FEB-2010	15-MAR-2010	12:00 PM	
2010	W	7	3	29-MAR-2010	27-MAR-2010	28-MAR-2010	28-MAR-2010	29-MAR-2010	12:00 PM	
2010	W	8	2	28-MAR-2010	10-APR-2010	14-APR-2010	14-MAR-2010	12-APR-2010	12:00 PM	
2010	W	9	3	11-APR-2010	24-APR-2010	26-APR-2010	14-MAR-2010	24-APR-2010	12:00 PM	
2010	W	10	1	25-APR-2010	01-MAY-2010	05-MAY-2010	11-APR-2010	15-MAY-2010	12:00 PM	
2010	W	11	2	09-MAY-2010	31-MAY-2010	06-JUN-2010	14-MAY-2010	24-MAY-2010	12:00 PM	

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## PTRCALN – Payroll Calendar Leave Report Rules

Leave Calendar Rules PTRCALN 8.0 (PROD)											
Year	Payroll ID	Pay of Month	Leave Start Date	Leave End Date	Leave Period From Date	Time Entry To Date	Time of Day to Stop Time Entry	Employee Web Access Limit	Approver Web Access Limit		
2010	BW	1	01-JAN-2010	01-JAN-2010	01-JAN-2010	01-JAN-2010	12:00 PM	01-JAN-2010	01-JAN-2010		
2010	BW	2	01-JAN-2010	16-JAN-2010	01-JAN-2010	16-JAN-2010	12:00 PM	01-JAN-2010	16-JAN-2010		
2010	BW	3	17-JAN-2010	30-JAN-2010	01-JAN-2010	30-JAN-2010	12:00 PM	01-JAN-2010	30-JAN-2010		
2010	BW	4	31-JAN-2010	13-FEB-2010	17-JAN-2010	13-FEB-2010	12:00 PM	01-JAN-2010	13-FEB-2010		
2010	BW	5	14-FEB-2010	27-FEB-2010	14-FEB-2010	27-FEB-2010	12:00 PM	01-JAN-2010	27-FEB-2010		
2010	BW	6	28-FEB-2010	13-MAR-2010	14-FEB-2010	13-MAR-2010	12:00 PM	01-JAN-2010	13-MAR-2010		
2010	BW	7	14-MAR-2010	27-MAR-2010	28-FEB-2010	27-MAR-2010	12:00 PM	01-JAN-2010	27-MAR-2010		
2010	BW	8	28-MAR-2010	10-APR-2010	14-MAR-2010	10-APR-2010	12:00 PM	01-JAN-2010	10-APR-2010		
2010	BW	9	11-APR-2010	24-APR-2010	28-MAR-2010	24-APR-2010	12:00 PM	01-JAN-2010	24-APR-2010		
2010	BW	10	25-APR-2010	08-MAY-2010	11-APR-2010	08-MAY-2010	12:00 PM	01-JAN-2010	08-MAY-2010		
2010	BW	11	09-MAY-2010	22-MAY-2010	24-APR-2010	22-MAY-2010	12:00 PM	01-JAN-2010	22-MAY-2010		

Note: There is no cut-off date or stop time for Approvers.

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## PTRECLS – Employee Class Rules, Exempt Staff Leave Reporting

Employee Class Rules PTRECLS 8.0 (PROD)	
Employee Class:	Exempt Staff
<div>General Time Entry Rules Position Defaults Regulatory Eligible Earnings Other Leave Categories Other Benefits Categories</div>	
Time Entry Method:	Payroll Time Entry
Time Entry Day:	N/A
Printed Time Sheet Method:	Time Sheet (Individual)
Payroll Time Entry Breakdown:	Pay Period
Leave Report Entry Method:	Leave Report on the Web
Leave Report Payroll ID:	BW [X] bi-weekly
Time Entry Approvals Rules	
Time Entry Type:	None
<input checked="" type="checkbox"/> Approval Required for Exception Time <input type="checkbox"/> Time In and Out Required <input type="checkbox"/> Clock In and Out <input type="checkbox"/> Can Request Leave in Advance <input type="checkbox"/> Override Labor Distribution on Web <input type="checkbox"/> Override Labor Distribution for Department	

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## PTRECLS – Employee Class Rules, Non-Exempt Staff Time Sheets

Employee Class Rules PTRECLS 8.0 (PROD)	
Employee Class:	Non-Exempt Staff
<div>General Time Entry Rules Position Defaults Regulatory Eligible Earnings Other Leave Categories Other Benefits Categories</div>	
Time Entry Method:	Employee Time Entry Via Web
Time Entry Day:	N/A
Printed Time Sheet Method:	Time Sheet (Individual)
Payroll Time Entry Breakdown:	Pay Period
Leave Report Entry Method:	None (Payroll)
Leave Report Payroll ID:	BW [X] bi-weekly
Time Entry Approvals Rules	
Time Entry Type:	Pay Period Time Sheet
<input checked="" type="checkbox"/> Approval Required for Exception Time <input type="checkbox"/> Time In and Out Required <input type="checkbox"/> Clock In and Out <input type="checkbox"/> Can Request Leave in Advance <input type="checkbox"/> Override Labor Distribution on Web <input type="checkbox"/> Override Labor Distribution for Department	

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## PTRECLS – Employee Class Rules, Student Time Sheets

Employee Class Rules: PTRECLS 8.2 (R000)

Employee Class: **ST** **Students**

General | Time Entry Rules | Position Defaults | Regulatory | Eligible Earnings | Other Leave Categories | Other Benefits Categories

Time Entry Method: **Employee Time Entry Via Web**

Time Entry Date: **N/A**

Printed Time Sheet Method: **Time Sheet (Individual)**

Payroll Time Entry Breakdown: **Pay Period**

Leave Report Entry Method: **None (Payroll)**

Leave Report Payroll ID: **dw** **bi-weekly**

Time Entry Approvals Rules

Time Entry Type: **Pay Period Time Sheet**

- ☐ Approval Required for Exception Time
- ☐ Time In and Out Required
- ☐ Clock In and Out
- ☐ Can Request Leave in Advance
- ☐ Override Labor Distribution on Web
- ☐ Override Labor Distribution for Department

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## PTRECLS – Employee Class Rules, Eligible Earnings

Employee Class Rules: PTRECLS 8.2 (R000)

Employee Class: **NO**

General | Time Entry Rules | Position Defaults | Regulatory | **Eligible Earnings** | Other Leave Categories | Other Benefits Categories

Earnings Code	Reduce Regular Hours	Attendance Indicator	Time Entry Sequence	Time Sheet Print Sequence	Approvers Indicator	Clock In/Out	Accrue Seniority	Activity Date
000 SW Transitional Pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	02-OCT-2009
001 Overtime at 1.0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
002 Student Pay	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
004 Bonus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
005 Regular Pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
006 Two Trade Wages (2WAG)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
007 Regular Earnings Special	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
008 Bonus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
009 Overtime at 1.5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
010 Overtime at 1.5 Special Rate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
011 Overtime 1.0 Admin Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
012 Out of Class Incentive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
013 Supplemental Pay 25% Fed Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
014 Supplemental Pay (neg tax)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
015 Retrospective Pay non-exempt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009
122 Workers Comp Ind: <5 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23-SEP-2009
123 Workers Comp Upgrade: >5 Days W	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23-SEP-2009
124 Education Premium	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-JUN-2009

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## PTRECLS – Leave Category Rules for Leave Reporting

Leave Category Rules: PTRECLS 8.2 (R000)

Leave Category: **P1** **Exempt 12 Mth 35 Hr**

Leave Code: **0000** **12 Mth 35 Hr**

Leave Report Indicator: **Leave**

Day or Hour Indicator: **Day**

General Leave Category

Accrue Frequency: **Pay Period**

Print Sequence Number: **1**

Cut Off Day: **1**

Base Date: **Adjusted Service**

☒ Allow Negative Balance

Roll NW/DOT: **0 / 30**

Banking Rules

Bank Frequency: **Annual**

Available Days: **0**

\* One Time and/or

Available Months: **0**

Accrual Method

Minimum Hours: **70.00**

or

Minimum Percent: **0**

Proration Hours: **70.00**

or

Proration Percent: **0**

Accrue in Peps: ☒ 1st ☒ 2nd ☒ 3rd ☐ 4th ☐ 5th

This is critical for Leave Reporting to work.

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## NTVACAT – Electronic Approval Code Validation

Approval Category Code	Description	Self-Service Description	Self-Service Display Sequence	Activity Date
0001	Create 10 Positions			24-AUG-2009
0002	Place Job creation for students			06-SEP-2005
0003	STUDENT positions			26-AUG-2007
0004	Terminate Student Jobs			03-AUG-2009
0005	Terminate Student EMPs			24-AUG-2009
0006	Web Time Entry			05-APR-2009
0007	Create 17000 Positions			24-AUG-2009

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## Systems (Employees' Job Information)

- NBAJOBS Payroll Default for current active jobs will have to be changed to correspond with the WTE default information from PTRECLS.
- New jobs will default with the WTE information from PTRECLS.
- NBAJOBS Default Earnings does not work with Web Time Entry for hourly jobs. It will double up time in PHAHOOR.

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## NBAJOBS – Payroll Default, Exempt Staff Leave Reporting

ID: <input type="text"/>		Last Paid Date: 20-JAN-2010	
Position: <input type="text"/>		Query Date: 01-JUL-2009	
<div>Base Job: <input type="radio"/> Job Defat <input type="radio"/> <b>Payroll Default</b> <input type="radio"/> Deferred Pay <input type="radio"/> Miscellaneous <input type="radio"/> Excluded Deductions <input type="radio"/> Default Earnings <input type="radio"/> Work Schedules <input type="radio"/> Job Labor Distribution</div>			
Effective Date: 01-JUL-2009			
Timesheet Defaults			
Timesheet COA:	P1025	This field drives the TS Org grouping. It must also correspond to PSAORGN for Approver security.	
Timesheet Organization:	01-Campus School Grl Hall		
Payroll ID:	01		
Default Shift:	01		
Time Entry Method:	Payroll Time Entry	These fields should match what is setup on PTRECLS.	
Time Entry Type:	None		
Leave Report Method:	Time In and Out		
Leave Report Payroll ID:	01	This field defines the type of web time entry.	
Premium Pay Methods			
Longevity:			
Premium Pay:			

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## NBAJOBS – Payroll Default, Non-Exempt Staff Time Sheet Reporting

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## NBAJOBS – Payroll Default, Student Time Sheet Reporting

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## Systems (Approval Routing)

The system will automatically run through this hierarchy:

- If there is no approver on NBAJQUE it goes to NTRRQUE, if not there, it goes to NBAPOSN and looks at the "Reports To" field. If it does not find an approver the employee will get an error message and will not be able to open their Time Sheet or Leave Report.

- NBAJQUE – Routing by Person
- NTRRQUE – Routing by Job or Organization
- NBAPOSN – Routing by Position

Note: Approver positions cannot be Pooled positions.

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## NBAJQUE – Routing by Person

WebTime Approval Queue NBAJQUE 8.0 (PROD)

ID:

Position:

Approval Category:

Approver Sequence	Approver Position	Approver or Incumbent	Approver Action
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

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## NTRRQUE – Routing by Job or Organization

Routing Queue Rules NTRRQUE 8.0 (PROD)

COA:  Position:  Organization:

Reports To:  Position Type:

Approval Category:

Web Time Entry

When setting this form up by "Position", the COA and Organization fields must be blank before you can populate the Approval Category. If using by "Organization", the Position field must be blank.

Approver Sequence	Mandatory Approver	Approver Position	Current Incumbent	Approver Action
1	<input checked="" type="checkbox"/>	AD0336 Dr. Smith College Camp	Ms. Cathy Hider Reid	Approve
2	<input type="checkbox"/>			
3	<input type="checkbox"/>			
4	<input type="checkbox"/>			
5	<input type="checkbox"/>			
6	<input type="checkbox"/>			
7	<input type="checkbox"/>			
8	<input type="checkbox"/>			
9	<input type="checkbox"/>			
10	<input type="checkbox"/>			

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## NTRRQUE – Routing by Job or Organization

Routing Queue Rules NTRRQUE 8.0 (PROD)

COA:  Position:  Organization:

Reports To:  Position Type:

Approval Category:

Web Time Entry

If more than one person needs to approve a time sheet or leave report, then they must be setup in the routing queue.

Approver Sequence	Mandatory Approver	Approver Position	Current Incumbent	Approver Action
1	<input checked="" type="checkbox"/>	AD0325 Teachers/Campus School	Jennifer Anne Gudecky	P13
2	<input checked="" type="checkbox"/>	AD0644 Asst for Administration	Ms. Lois Buell Oudermans	Approve
3	<input type="checkbox"/>			
4	<input type="checkbox"/>			
5	<input type="checkbox"/>			
6	<input type="checkbox"/>			
7	<input type="checkbox"/>			
8	<input type="checkbox"/>			
9	<input type="checkbox"/>			
10	<input type="checkbox"/>			

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## NBAPOSN – Routing by Position

Position Definition NBAPOSN 9.0 (PROD)

Position Number: A00114

Position Comments: Regulator

Position Status: Active  
Position Begin Date: 01-30-1997  
Type: Single  
Position End Date:  
CON: 1

Compensation and Classification

Position Class: 0001 ☒ Other Non-Faculty Professional  
Position Title: Director of Admission & P.A. Ad.  
Employee Class: 01 ☒ Exempt FTY, Full Year  
Job Progression:  
Salary Group: 0001 ☒ Exempt 25 Hour  
Salary Table: 01  
Salary Grade: 1  
Salary Step:  
Reports To: AC0001 ☒ Dir. Smith College Campus Sub.  
Work Schedule:  
Probationary Period:  
Bargaining Unit: CAMPSC ☒ Campus School  
Approver positions cannot be pooled.

Appointment Percent: 100.00  
Budget Type: Permanent  
☒ Except Indicator  
☐ Accrue Seniority  
Range Low: 34,049.20  
Range Midpoint: 42,564.79  
Range High: 51,080.38  
Step Value:

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## Systems (Security for WTE)

- In order for an Approver to have access to an employee's WTE record, they must have the correct security setup. Each Approver must be setup on GOAEACC and PTRUSER with either one or both of the PSA security setups. Proxy's must be setup in GOAEACC.
- GOAEACC – Access Control
- PTRUSER – User Code Rules
- PSAECLS – Employee Class Security
- PSAORGN – Organization Class Security

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## GOAEACC – Access Control

Extended Access Controls GOAEACC 9.0 (PROD)

Username	ID	Name
CNEWBURY	990225914	Mr. M. Catherine Newbury
CNEWBEC	990275488	Christopher B. Nemec
CNEWES	990273079	Carly Ann Nees
CNEWPRK	990310247	Cheryl A. O'Brien
CNEWSTINE	990405690	Ruth Constantine
CNEWTON	990576885	Mr. Charles J. Parnham, Jr.
CNEWOMK	990591217	Mr. Christina S. Parnham
CNEWOWZ	990599403	Christine Dorothy Proszewski
CNEWSTN	990241379	Charles P. Smith
CNEWSTN	990709016	Mr. Cathy Heller-Jord
CNEWSEN	990719355	Catherine L. Rosen
CNEWCCI	990519351	Mr. Cynthia L. Russo
CNEWAN	990516196	Christina M. Ryan
CNEWANN	990576430	Mr. Christopher Shanky
CNEWELTON	99044364	Mr. Christine Marie Shelton
CNEWBICA	99031024	Cynthia L. Shobda
CNEWOT	990478124	Camille Tate
CNEWALIN	990504029	Mr. Charles P. Stealin
CNEWAREZ	990517184	Christina Suarez
CNEWFT	990500255	Mr. Catherine Swift
CNEWORP	990502741	Mr. Cathryn R. Thorpe
CNEWTEL	990227787	Carolyn Marie Webel
CNEWTEL	990228015	Christine Ann White-Ziegler

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## PTRUSER – User Code Rules

User Code Rules: PTRUSER 8.0 (PROD)

User ID: L48LL  
User Name: Leslie Hill  
Job Title: WTE Approver  
Maximum Salary Level:   
  
Salary Planner Master Organization: None  
Faculty Compensation Master Organization: None  
Activity Date: 29-NOV-2007

User ID: L48LL  
User Name: Lawrence (Larry) Hill  
Job Title: Human Resources  
Maximum Salary Level:   
  
Salary Planner Master Organization: None  
Faculty Compensation Master Organization: None  
Activity Date: 11-FEB-2008

☐ Master Employee  
☒ Master Organization  
☒ Master Employee Class

☐ Benefit Administrator  
☐ Time Entry Approvals Supervisor  
☐ Leave Request Approvals Supervisor  
☐ Effort Certification Supervisor  
☐ Labor Redistribution Supervisor

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## PSAECLS – Employee Class Security

Employee Class Security: PSAECLS 8.0 (PROD)

Current User: JJCWIT2  
New User:   
  
Include Employee Classes: ☐  
Exclude Employee Classes: ☐

Employee Class:   
Activity Date:   
  
C1 Casual Intermittent Worker 13-MAY-2008  
C2 Casual Seasonal Worker 13-MAY-2008  
C3 Casual Temporary Worker 13-MAY-2008  
E1 Exempt FT, Full Year 07-DEC-2005  
L1 LT - NonExempt FT, Full Year 10-OCT-2005  
L2 LT - NonExempt FT, Academic Yr 10-OCT-2005  
L3 LT - NonExempt FT, Full Year 10-OCT-2005  
L4 LT - NonExempt FT, Academic Yr 10-OCT-2005  
N1 Non-Exempt FT, Full Year 05-AUG-2005  
N2 Non-Exempt FT, Academic Year 05-AUG-2005  
N3 Non-Exempt FT, Full Year 05-AUG-2005  
N4 Non-Exempt FT, Academic Year 05-AUG-2005  
N5 Non-Exempt, Less Than 1 Yr 07-AUG-2005  
ST Students 10-MAY-2003  
U1 Union FT, Full Year 10-MAY-2003  
U2 Union FT, Academic Year 10-MAY-2003  
U3 Union FT, Full Year 10-MAY-2003  
U4 Union FT, Academic Year 10-MAY-2003

If the Approver has Master Employee Class checked off on PTRUSER, then this form would be blank.  
If the Master Employee Class is NOT checked on PTRUSER, then those restricted employee classes are listed.

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## PSAORGN – Organization Security

Organization Security: PSAORGN 8.0 (PROD)

Current User: CAED  
New User:   
  
Include Organization Line: ☐  
Exclude Organization Line: ☐

Organization Low:   
Organization High:   
Activity Date:   
  
P100 Work Study 03-SEP-2005  
P105 Campus School Oil Hall 29-MAY-2005  
P106 South Northampton Summer 25-MAY-2005  
P108 Work Study 03-SEP-2005  
P109 Campus School Oil Hall 29-MAY-2005  
P110 South Northampton Summer 25-MAY-2005

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### Systems (WTE Notifications)

- Employees and Approvers will need to know when to complete and approve Time Sheets or Leave Reports.
- What will your system be?
- Who will create this system?
- Who will maintain this system?
- Who is responsible for these notification?

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### Systems (Employee Self-Service)

- Employee Self Service for WTE will need to be activated.
- Your options are;
  - Leave Reporting
  - Time Sheets
  - Requesting Time Off
  - Benefited Leave Accruals
- Note: The requesting time off module is in addition to the time sheet. It does not replace it.

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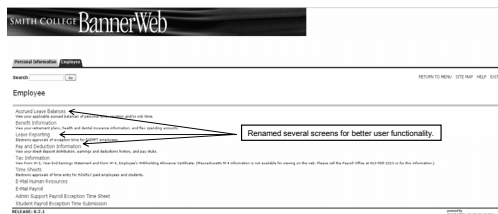
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### Employee Self Service



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**Time Sheet**

File Edit View Options Help DBS  
 Time Worksheet with 100% AutoScrolling & TabularControl

Internet Status: Online | Time: 05:00 AM | Date: 7-21-2007 | Time Zone: EST | Max Data: 1000

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**Sheet Sheet**

Name C: RCTG  
 Title Name: RCTG  
 Department name: RCTG  
 Time Sheet Period:  
 Entered by date: 7/21/2007

Care Code	Shift Default Hours or Units	Total Hours	Units	Monday July 04, 2007	Tuesday July 05, 2007	Wednesday July 07, 2007	Thursday July 08, 2007	Friday July 09, 2007	Saturday July 10, 2007
Regular Pay	020	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Overtime 1.5 A.M.	059	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Overtime 1.5 P.M.	059	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Sick Leave	300	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Holiday Time	190	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Vacation Time	190	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Unpaid Leave	310	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Paid Excessed Time	310	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Compensatory Time	250	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Stand By Time	059	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Stand By Sick Leave	102	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Family Care	421	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Care Facility Level 1	424	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Care Facility Level 2	424	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Care Facility Level 3	424	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Care Facility Level 4	422	0	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
<b>Total Hours</b>		56	0	0	0	0	0	0	0
<b>Total Units</b>									

Printout Menu | Printout | Comments | Approve | New

[illegible][illegible]

### Employee Self Service – Hourly Approver

[illegible]

### Systems (Good-to-Knows)

- There is an additional Payroll processing step. After running PHPTIME you must then run PHPMTIM. This process pulls in any hours on the Timesheet into Banner for payroll. If this process is not run hours from WTE are not included.
- Hours can still be added/changed manually on PHAHOUR.
- Leave Reporting does not run through Payroll, however the leave accrual still does. You will want to keep to the same payroll schedule for Leave Reporting so your accruals are accurate.

## Systems (Good-to-Knows) 7.x

- **Pay periods are listed in ascending order.**
- **You may only view employee leave balances on Leave Reports NOT Time Sheets.**
- **FTE or Appt Pct is being used to calculate leave usage by day.**
- **Closed transactions get stuck in the Approver's queue.**



#### Systems (Known Defects) 7.x

- Anyone using Banner version's 7.0 to 7.3 may run into issues.
- The majority of defects were corrected in 7.3

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#### Systems (Good-to-Knows) 8.x

- 8.0 Pay periods are listed in descending order.
- 8.0 Hours Per Day is now used to calculate leave usage by day.
- 8.1 Closed transactions can now be canceled by the Superuser.
- 8.2 You may now view employee leave balances on Leave Reports AND Time Sheets.

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#### Systems (Known Defects) 8.x

##### Defect #: 1-6J3YFC (Column Information Shifted)

- Status: Resolved
- Date Resolved: 8/12/2009
- Patch #: p1-6j3yfc\_bwp80200
- Reported Version: 8.2
- Fixed Version: 8.2.0.1
- Summary: Information in columns is shifted on Timesheet Preview

##### Defect #: 1-6XUUOO (Wrong Last Name)

- Reported Date: 8/21/2009
- Reported Version: 8.2
- Summary: "Approved by" name combines the Approvers first name with the employee's last name.

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## Systems (Known Defects) 8.x

Defect #: 1-9GPG10 (Performance Issue)

- Reported Date: 12/11/2009
- Reported Version: 8.1.1.1
- Summary: Performance issues when approving timesheets

SR #:1-590073221 (Leave Accruals on Leave Report)

- Attached defect 1-3ULWHE (incorrect balances in the Accrued Leave Balances)

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## Testing

- Assign members of your team to be different types of users in the testing (employee, approver, proxy, payroll).
- Put together a testing plan.
- Complete FULL payrolls for each type of payroll that you run.
- Test each type of earn code, leave code etc.
- Use every part of the system, even if its just testing the comments field.... (because there is a glitch in it)
- When you are done testing, change roles and test some more.
- You cannot over test!!!!

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## Implementing The Project

*Rollout, Training & Maintenance*

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### Rolling Out Web Time Entry

- You know your deliverables....now implement them!
- Put together a rollout plan;
  - by employment group
  - by department
- Apply the rollout plan to a training schedule.
- Send out communication regarding the rollout and training (e.g. notices, checklists etc.).

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### Training

- Once you have identified how you will rollout web time entry, its time to setup training.
- Train your support staff first. They are the first line of defense and your go-to person in the office or department.
- Depending on the size of your institution, you may want to consider small classroom size trainings to presentation trainings to web-based trainings. What works for your audience?

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### Maintenance

- How do new employees get setup?
- How do new users get access?
- Who completes the system setup?
- Who handles the notification system?

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## Completing The Project

*Document, document, document!*

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### Closing out the Project

- Identify and document procedures.
- Create and distribute final project report.
- Obtain final acceptance of the project.
- Measure client satisfaction.
- Archive and retain project documents in order to retain organizational knowledge.

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### In Summary...

- Know your project
- Know your communication plan
- Know your system
- Test, Test, Test
- Communication and Training are critical!
- Know your maintenance procedures.
- Do not rush the project, give yourself time to do it right!

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# Questions??

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## Thank You!

Sheli Senecal  
ssenecal@smith.edu

Please complete the online class evaluation form  
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