

STEPHEN F. AUSTIN STATE UNIVERSITY

A graphic of a white banner with a black outline, featuring a central rectangular area and two pointed ends that resemble ribbon tails. The word "Banner" is written in a large, bold, black sans-serif font across the center of the banner.

Banner

Payroll

“Web Leave Approver’s Manual”

Revised May 6, 2011
Confidential Business Information

SFASU – Banner Web Leave Approver’s Manual

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SFA – Banner Web Leave Approver’s Manual

Overview

This document is provided as a resource to assist you approving leave reports submitted by your employees. Leave reports must be approved by employees’ supervisors before they are processed by the Payroll Office. Failure to approve leave sheets before the deadline each pay period may result in employees leave being inaccurate, so it is critical not only that employees submit their leave, but that you approve their leave, in a timely manner. The steps within this document will guide you through this process. At any time should you need assistance, feel free to contact your supervisor or one of the individuals listed in the Helpful Contacts section below.

Helpful Contacts

Should you encounter difficulty in approving leave reports, contact one of the following individuals for assistance.

You cannot log into mySFA

Human Resources	(936) 468-2304	hr@sfasu.edu
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You can access your department’s leave reports but the system displays the wrong employees, or employees are missing

Controller’s Office	Dalyce Franks	(936) 468-2382	franksdj@sfasu.edu
Payroll	Judy Duffin	(936) 468-2172	payroll@sfasu.edu

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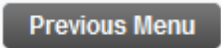







Web Leave Report Navigation

Navigation Buttons

As you navigate the system, you will see a variety of navigation buttons. The following guide explains the function of each button.




Add Comment	Adds a comment to a leave report during the approvals process.
Approve	Approves the leave report.
Cancel	Cancels out of the current screen.
Change Record	Opens a submitted leave report for editing so that you may change it yourself. It is generally preferred that you use the Return for Correction button instead to request that the employee make the corrections.
Comments	Accesses the Comments portion of the leave report.
Copy	Copies time from the current day to other days in the same pay period.
Delete	Deletes the time previously entered on a specific day.
Leave Report	Returns you to the pay period leave report view.
Next	Moves forward to the next work week on the leave report.
Next Day	Takes you to the next day’s leave report. Used when viewing the leave report for a specific day.
Position Selection	Returns you to the leave report selection screen, where you can select a leave report for a different job assignment or pay period.
Preview	Generates a preview of the leave report before submitting it. The preview function allows you to see the full pay period on one screen, but does not allow you to edit any time.
Previous	Moves backward to the previous work week on the leave report.
Previous Day	Takes you to the previous day’s leave report. Used when viewing the leave report for a specific day.

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	Returns you to the previous menu or screen.
	Restarts the leave report. Use this button with caution; restarting a leave report will delete all time that has been entered and reset the report to its original state.
	Returns a leave report to the employee for correction. If you return a leave report, you should first add comments to it explaining what needs correction. After the employee has corrected the leave report, he or she will need to resubmit it to you for approval.
	Saves the data on the leave report. Used when entering time or comments.
	Selects the query information entered and continues to the next form in the approval process.
	Allows you to select all of the leave reports that were submitted to you. This button enables a mass-approve or mass-acknowledgement of the leave reports for the pay period. This button is only available in the department summary view.
	Submits the information on the current screen. Used primarily when certifying your leave report during the leave report submission process.
	Submits your leave report to your supervisor for approval.

Keyboard Shortcuts

When entering time on your leave report, you don’t always have to reach for your mouse to navigate the system. The following keyboard shortcuts will work to move within a leave report.

	The tab key can be used to move between fields on the leave report.
	The enter key will select the item your cursor is currently on, or allow you to submit the current form.
	The escape key will clear any unsaved data in the current field.

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Approving Leave Reports

Accessing Your Department’s Reports

The procedure below will guide you in accessing the leave reporting system in order to approve your department’s leave reports.

1. Log into mySFA with your mySFA ID and password.
2. Click the Employee tab.
3. Click on Leave Report.



If you approve reports for more than one department, you will see multiple departments listed.

4. Click on the pay period for the desired department.
5. The Selection Criteria form below will load. Select “Approve or Acknowledge time” from the list by clicking the radio button in the “My Choice” column, and then clicking the Select button.

Time Reporting Selection

Selection Criteria

My Choice

Access my Leave Report:

Approve or Acknowledge Time:

Act as Proxy:

Act as Superuser:

Select

[Proxy Set Up](#)

6. You will now see a form that displays the leave reports you have available to approve.

Approver Selection

Choose an Organization, Pay ID and Pay Period. Determine the Sort Order and then choose Select.

Leave Report

My Choice

Department and Description: MN, Apr 01, 2011 to Apr 30, 2011

Leave Period: MN, May 01, 2011 to May 31, 2011

Sort Order

My Choice

Sort employees' records by Status then by Name:

Sort employees' records by Name:

Select

RFI FASE: 8.3

powered by

7. In each section, the departments you are authorized to approve will be listed. To make a selection, click the radio button in the **My Choice** column for the department you wish to approve. Next, select the pay period you want to approve from the **Leave Period** column.

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8. You may select whether to sort the department approvals summary list by either status and name, or just by employee names using the radio buttons under the **Sort Option** heading. How you sort the department approvals summary list is a matter of personal preference, and both options will allow you to see all employees in your department and their leave report status.
9. Click the **Select** button to continue. Your department approvals summary list will load.
10. You will notice that all of the employees in your department are listed. Only the leave for the exempt employees and faculty needs to be approved through this process.

Using the Department Approvals Summary View

1. The department approvals summary will display a list of the employees in your department, and the status on their leave report. You can only take action on a leave report that has been submitted to you. Some of the various statuses you may see on leave reports are:
 - **Not Started:** This status indicates that the employee has not yet accessed his or her leave report for the pay period.
 - **In Progress:** This status indicates that the employee has opened his or her leave report and has started entering leave for the pay period.
 - **Pending:** This status indicates that the employee has submitted his or her leave for approval, and the report is ready for you to approve.
 - **In the Queue:** This status indicates that a leave report has been submitted for approval, but another supervisor must first approve it before the report routes to you for your approval.
 - **Approved:** This status indicates that you have completed the approval of the leave report.
 - **Completed:** This status indicates that the leave report has been previously approved and has now been processed by the Payroll Office.

Department Summary

Select the employee's name to access additional details.

COA: S, Stephen F. Austin State University
 Department: 30101, Controllers Office
 Leave Period: Apr 01, 2011 to Apr 30, 2011
 Act as Proxy: Not Applicable
 Leave Period Leave Entry Status: Open until May 07, 2011, 05:00 P.M.


Change Selection Select All, Approve or FYI Reset Save

Pending									
ID	Name, Position and Title	Required Action	Total Days	Total Hours	Total Units	Queue Status	Approve or FYI	Return for Correction	Cancel Other Information
<input type="checkbox"/>	Dannette Leanne Sales E99920 - 00 Asst Controller	Approve		.00	32.50	.00	<input type="checkbox"/>	<input type="checkbox"/>	Change Leave Record Leave Balance

In Progress						
ID	Name, Position and Title	Total Days	Total Hours	Total Units	Cancel	Other Information
<input type="checkbox"/>	Eric Randall Ashworth E99775 - 00 Acct II		.00	.00	.00	Leave Balance

2. On each employee’s record that is in a pending status, you will see the following links and checkboxes:

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- **Employee’s Name:** The employee’s name is a link that will take you to the detailed leave report.
- **Total Hours and Total Units:** These columns indicate the total hours entered on the leave report. The detailed breakdown of these hours can be viewed by clicking the employee’s name to access the full leave report.
- **Approve or FYI:** This checkbox allows you to approve or acknowledge the leave report. After clicking this checkbox, clicking the  button will complete the action in the **Required Action** column.
- **Return for Correction:** This checkbox allows you to return the leave report to the employee for correction. Returned leave reports should have comments entered first, before the report is returned, so that the reason for the return is documented. Please see the directions on adding comments to a leave report below. ***When you return a leave report for correction, notify the employee to make changes and resubmit the report, since the employee will not receive notification automatically.***
- **Change Leave Record:** This link allows you to open the leave report in editing mode, and make changes to the report. Any changes you make directly to the leave report should be documented in the comments section. The preferred procedure for editing an incorrect leave report is to return the report to the employee with a request that the employee make the changes. Supervisors should change leave reports only when special circumstances exist that would prevent the employee from completing the corrections himself or herself before the leave report deadline.
- **Comments:** Allows you to view and/or edit comments on the leave report. This link will not display on leave reports that have no comments entered.
- **Leave Balance:** Allows you to view the current leave balances for the employee.

3. To view the leave report, click the employee’s name.

Pending									
ID	Name, Position and Title	Required Action	Total Days	Total Hours	Total Units	Queue Status	Approve or FYI	Return for Correction	Cancel Other Information
E99920 - 00	Dannette Leanne Sales Asst Controller	Approve	.00	32.50	.00		<input type="checkbox"/>	<input type="checkbox"/>	Change Leave Record Leave Balance

4. The employee’s leave report will now load in preview mode. You will be able to see the details of the hours entered for the pay period.

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Viewing the Details of a Leave Report

1. The top portion of the leave report will contain columns for each day of the pay period, and rows for each type of leave. The images below show the top portion of a leave report in the approver’s view.

Employee ID and Name: Dannette Leanne Sales
 Title: E99920-00 Asst Controller
 Department and Description: S 30101 Controllers Office
 Transaction Status: Pending

[Leave Balances](#) | [Routing Queue](#)

Leave Report

Earnings	Total	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Hours	Units	Apr 01, 2011	Apr 02, 2011	Apr 03, 2011	Apr 04, 2011	Apr 05, 2011	Apr 06, 2011	Apr 07, 2011	Apr 08, 2011	Apr 09, 2011	Apr 10, 2011	Apr 11, 2011	Apr 12, 2011	Apr 13, 2011	Apr 14, 2011	Apr 15, 2011
Vacation Leave	24					8										
Sick Leave	2.5															
State 1.0 Equiv Comp Taken	6															
Total Hours:	32.5					8										
Total Units:	0															

[Leave Balances](#) | [Routing Queue](#)

Leave Report

Earnings	Total	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Hours	Units	Apr 01, 2011	Apr 02, 2011	Apr 03, 2011	Apr 04, 2011	Apr 05, 2011	Apr 06, 2011	Apr 07, 2011	Apr 08, 2011	Apr 09, 2011	Apr 10, 2011	Apr 11, 2011	Apr 12, 2011	Apr 13, 2011	Apr 14, 2011	Apr 15, 2011
Vacation Leave	24					8										
Sick Leave	2.5															
State 1.0 Equiv Comp Taken	6															
Total Hours:	32.5					8										
Total Units:	0															

Leave Balances as of May 02, 2011

Type of Leave	Hours or Days	Banked	Date Available	Available Beginning Balance	Earned	Taken	Available Balance
State 1.0 Equiv Comp Time	Hours	0	Jun 01, 2004	238.5	0	14	224.5
Exempt Comp Time Earned	Hours	0	Jun 01, 2004	0	0	0	0
Sick Leave Pool	Hours	0	Jun 01, 2004	0	0	0	0
Sick Leave	Hours	0	Jun 01, 2004	429.34	24	11	442.34
Unpaid Leave	Hours	0	Jun 01, 2004	0	0	0	0
Vacation Leave	Hours	0	Jun 01, 2004	156.5	30	44	142.5

Routing Queue

Name	Action and Date
Dannette Leanne Sales	Originated May 02, 2011 07:04 pm
Dannette Leanne Sales	Submitted May 02, 2011 07:05 pm
Dora J. Fuselier	Pending

2. The bottom section of the form will indicate any comments that have been entered on the leave report, the routing queue for the leave report, and current leave balances.

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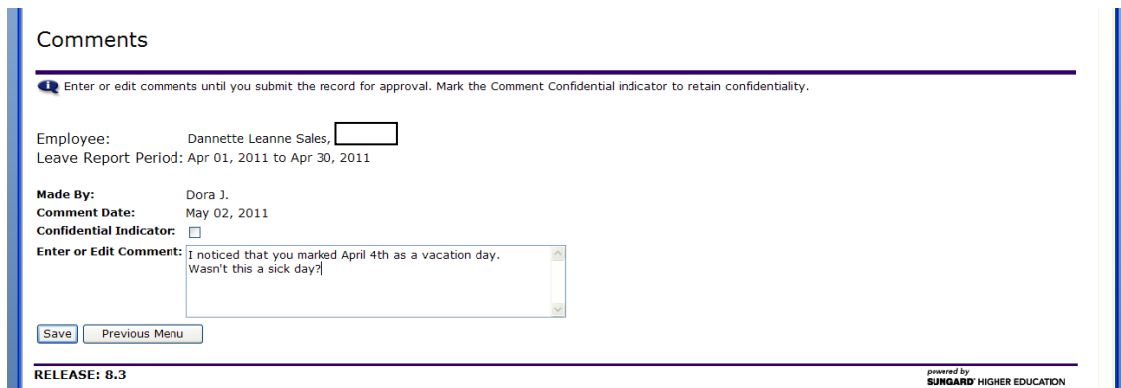
Adding Comments to an Employee’s Leave Report

If you need to return or change a leave report, you must first enter comments explaining the changes that need to be made. Comments may be added to a leave report by following the steps below.

1. Access the leave report for a specific employee.
2. At the bottom of the leave report, look for a block of navigation buttons like the ones in the image below.



3. Click the **Add Comment** button.
4. The Comments section of the leave report will load.



5. Add your comments in the **Enter or Edit Comment** field, and then click the **Save** button.
6. After you have completed editing or viewing the comments on your leave report, click the **Previous Menu** button to return to the leave report.

Returning a Leave Report for Correction

If a leave report is not correct, you should return it to the employee for correction, rather than edit the leave report yourself.

1. Enter comments on the leave report that indicate why you are returning the leave report and what the employee needs to correct by following the steps above for entering comments.
2. Click the **Return for Correction** button after you have entered your comments.
3. The leave report will be returned to the employee for correction. The confirmation message below will be displayed.

⚠ Time transaction successfully returned for correction.

4. **Notify your employee that the leave report has been returned so that the employee knows to log into the report and correct it. At this time, no email notification is made to the employee.**
Returned leave reports will still need to be resubmitted and approved before the deadlines

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established for the pay period by the Payroll Office. **All exempt employees and faculty should submit a report monthly even when no leave was taken.**

Editing a Leave Report

While it is preferred that a leave report that needs correction is returned to the employee, we realize there are times when this may not be possible. Under such circumstances, you may correct the leave report yourself.

1. Enter comments on the leave report that indicate why you are editing the leave report by following the steps for entering comments on page 9.
2. Click the **Change Record** button on the leave report to open the report for editing.
3. Follow the directions within the Banner Self Service Leave Reporting Manual for manually entering leave taken.

Approving a Leave Report

Leave reports may be approved from two locations – the department summary view, and the employee leave report detail view. Regardless of which view you approve the reports from, you should always view the details of the leave report before approving the report.

1. To approve the leave report from the detail view, click the **Approve** button while viewing the leave report.

Employee ID and Name: [] Dannette Leanne Sales
Title: E99920-00 Asst Controller
Department and Description: S 30101 Controllers Office
Transaction Status: Pending

Buttons: Previous Menu, Approve, Return for Correction, Change Record, Delete, Add Comment, Next

Leave Balances | Routing Queue

Leave Report

Earnings	Total	Total Friday, Saturday, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday	Hours	Units	Apr 01, 2011	Apr 02, 2011	Apr 03, 2011	Apr 04, 2011	Apr 05, 2011	Apr 06, 2011	Apr 07, 2011	Apr 08, 2011	Apr 09, 2011	Apr 10, 2011	Apr 11, 2011	Apr 12, 2011	Apr 13, 2011	Apr 14, 2011	Apr 15, 2011
Vacation Leave	24							8											
Sick Leave	2.5																		
State 1.0 Equiv Comp Taken	6																		
Total Hours:	32.5							8											
Total Units:	0																		

Leave Balances as of May 02, 2011

Type of Leave	Hours or Days	Banked	Date Available	Available Beginning Balance	Earned	Taken	Available Balance
State 1.0 Equiv Comp Time	Hours	0	Jun 01, 2004	238.5	0	14	224.5
Exempt Comp Time Earned	Hours	0	Jun 01, 2004	0	0	0	0
Sick Leave Pool	Hours	0	Jun 01, 2004	0	0	0	0
Sick Leave	Hours	0	Jun 01, 2004	429.34	24	11	442.34
Unpaid Leave	Hours	0	Jun 01, 2004	0	0	0	0
Vacation Leave	Hours	0	Jun 01, 2004	156.5	30	44	142.5


Routing Queue

Name	Action and Date
Dannette Leanne Sales	Originated May 02, 2011 07:04 pm
Dannette Leanne Sales	Submitted May 02, 2011 07:05 pm

2. To approve the leave report from the department summary view, click the checkbox in the **Approve or FYI** column for each employee you are ready to approve, or if you have verified all the time for your departmental employees, you can click on the **Select All, Approve or FYI** button. Then click the **Save** button.

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3. The confirmation message below will be displayed after a successful approval.

 **Time transaction successfully approved.**

Managing Leave Report Approval Proxies

There may be times when you need to assign a proxy to approve leave reports in your absence. A proxy is an approver who you are temporarily giving the rights to approve leave reports on your behalf to. Proxies should be other Stephen F. Austin State University employees who would have some ability to determine the accuracy of the leave report. Designating a proxy to approve a leave report in your absence does not eliminate your responsibility to approve leave for your employees. The proxy function is intended only to be used when circumstances such as a vacation or illness prevent you from completing your normal duties as a leave report approver before the deadline for the pay period.

Establishing or Removing a Leave Report Proxy

1. At the bottom of the Selection Criteria screen, look for the **Proxy Set Up** link.



Time Reporting Selection

Selection Criteria

My Choice

Access my Leave Report:

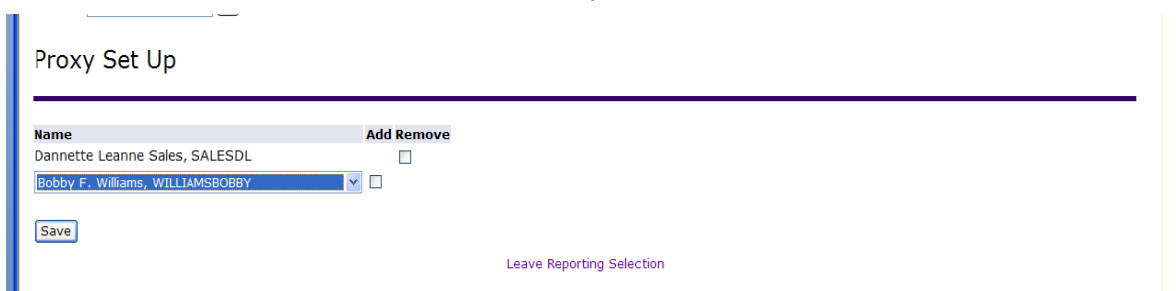
Approve or Acknowledge Time:

Act as Proxy:

Act as Superuser:

[Proxy Set Up](#)

2. Click the **Proxy Set Up** link (bottom center of the page).
3. To add a proxy, select the appropriate approver from the pull-down list in the **Name** column, then click the checkbox in the **Add** column, and finally, click the **Save** button.



Proxy Set Up

Name	Add	Remove
Dannette Leanne Sales, SALES DL	<input type="checkbox"/>	<input type="checkbox"/>
Bobby F. Williams, WILLIAMSBOBBY	<input type="checkbox"/>	<input type="checkbox"/>

Leave Reporting Selection

4. To delete a proxy, select the line for the proxy, click the checkbox in the **Remove** column, and then click the **Save** button.

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Approving Leave as a Proxy

If another approver has granted you proxy rights, you may approve leave as that approver by selecting that approver in the **Act As Proxy** pull-down list on the Selection Criteria screen. You will then proceed through the steps for approving, returning, and editing leave reports as normal. However, instead of seeing your own employees’ leave reports, you will see the reports for the employees that report to the supervisor for whom you are acting as a proxy.