GUIDELINES FOR SETUP OF FYI PARTICIPANTS FOR
WEB TIME SHEETS

FYI Access Entry Guidelines for Web Time Sheets
Includes: NBAJQUE - Override Approvals Queue
NBR2JQE – Verification Report

Purpose: To describe the responsibilities, process, and troubleshooting of assigning time sheet FYI(s) to employee records for web time sheet processing.

Target Audience: Payroll/Personnel Assistants (PPAs), Cost Center Clerks (CCCs), and MAU HR offices

General Guidelines
PPAs, CCCs or HR Technicians are responsible for entering and maintaining FYI access for time sheets using the Banner form NBAJQUE as per the procedures of each respective campus.

FYIs are allowed to view, but not approve or edit, web time sheets in UAOnline. FYI access can be granted to a departmental user who is not an employee’s supervisor or time sheet approver, but still needs to view web time sheets for the department’s employees.

[The official supervisor or time sheet approver for each job is maintained via the Banner NEA2SPE and NEA2SPR forms. For instructions on maintaining NEA2SPE and NEA2SPR information, refer to http://www.alaska.edu/files/hr/banner.data_entry.supervisor_tracking.pdf.]

Documentation Purpose
These guidelines cover the required entry in Banner’s NBAJQUE (Override Approvals Queue) form to grant FYI access to PPAs, CCCs, or other users needing view access to online time sheets for their department’s employees. The NBR2JQE report is available for verifying FYI participant setup prior to the next regular payroll run.

Responsibilities
In order for a user to view an employee’s web time sheet in UAOnline, the PPA/CCC must complete the appropriate entry in NBAJQUE. For each department employee record, the PPA/CCC enters the ID and position information for each user who requires FYI view access for the employee's web time sheet in UAOnline.

Please Note:
- A position search function based on the FYI’s employee ID and name is not available in the NBAJQUE form. Prior to completing the entry in NBAJQUE, the PPA/CCC can perform a search for the FYI’s position (PCN) in NBJOBJS or NBJLJST.

- A PCN must have a UA ID number associated with it. After entering a PCN in NBAJQUE, verify that the appropriate user's ID and name default into the corresponding fields. If the user's ID and name do not default, remove the FYI (Approver Sequence) by selecting the record, and then selecting Shift F6 or the Remove Record button.
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- In order for a user to view time sheets for a particular pay period, the PPA/CCC must complete the entry in NBAJQUE prior to the employee starting their time sheet in UAOnline.

- NBAJQUE is primarily used for allowing viewing access of employee time sheets. NBAJQUE is not to be used to grant approval action for departmental participants. Supervisor and time sheet approver designations are only entered via either NEA2SPE (Employee’s Supervisor Form) or NEA2SPR (Supervisor’s Employees Form).

For instructions on setting up time sheet approvers and/or supervisors, refer to the Supervisor/Time Approver Setup - NEA2SPR & NEA2SPE at http://www.alaska.edu/files/hr/banner.data_entry.supervisor_tracking.pdf

Security
To perform data entry in NBAJQUE, the PPA/CCC must request and be granted the “HR_PPA_CLS” security class on the appropriate security access request form. Submission of the form can be made to the campus HR security coordinator.

Security access request forms for each campus are located on the Web Time Sheet Entry web page under the "FYI Reviewers" section at http://www.alaska.edu/hr/hr-procedures/web-timesheets/#fyi

Setup and Entry Instructions
Access the NBAJQUE form from Banner’s General Menu by typing “NBAJQUE” in the Go To... field and hitting Enter, or by double-clicking the following menu selections:

- Human Resources [*HRS]
- Electronic Approvals [*HRSELECAPPR]
- Override Approval Queue [NBAJQUE]

Enter the ID of the employee for which the user (FYI) would receive time sheet access. If you do not know the employee’s ID, you may select the drop-down arrow next to the field to perform a search in Banner.

![NBAJQUE Form Screenshot]

ID: 306901236
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Proceed to the next block by selecting Ctrl+Page Down or the Next Block button.
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Enter the employee’s Position and Suffix number. If you do not know the employee’s position and suffix number, you may select the drop-down arrow next to the either field to perform a search in Banner’s NBIJLST form.

If searching for the position/suffix, more than one position/suffix may be listed based on the Query Date (default is today’s date). After verifying the appropriate PCN, double-click on the PCN field or click the Select button to insert the PCN/Suffix into the fields on the NBAJQUE form.

Proceed to the next block by selecting Ctrl+Page Down or the Next Block button.

In the Approval Category field, enter “TIME” (for the Web Time sheet) or click the drop-down arrow to select “TIME” from a list. Proceed to the next block by selecting Ctrl+Page Down or the Next Block button.

Note: The screenshot above is from the Banner PREP instance, which reflects an approval category description of “Timesheet Entry via Web.” Banner PROD will reflect a description of “Web Time sheet.”
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In the Approver Sequence field, type the number “10” for the first FYI Access. If a valid FYI entry already exists, then increase the sequence entry by one number (12, 13, etc.) for the new entry.

In the Approver Position field, enter the PCN (position control number) for the FYI user. In the Approver or Incumbent fields, the UA ID and name of the employee attached to the PCN should automatically populate. If not, you may use the drop-down arrow to search for and select the appropriate FYI contact.

**If the FYI user's ID and name do not populate the Approver or Incumbent fields, DO NOT continue entry of information. If there is no ID associated with the PCN, the employee, time sheet approver, and any FYI participants may not be able to access the online time sheet. Remove the record until the person in that PCN is known.**

**Note:** A search function based on the FYI’s employee ID and name is not available in the NBAJQUE form. The PPA/CCC can perform a search for the FYI’s PCN in NBAJOBS or NBIJLST prior to completing the entry in NBAJQUE.

Save the record by selecting F10 or the Save button. In the bottom-left of the window, verify that a “records applied and saved” notification message is displayed; see the example below.

```
FRM-40400: Transaction complete: 1 records applied and saved.
Record: 1/1 ... <OSC>
```

If you need to enter additional FYI records for the employee ID, arrow to a blank line in the Approver Sequence column and enter “11” and repeat the same entry steps. For each additional record, increase the sequence entry by one number (12, 13, etc.).

**NOTE:** The set-up of more than three (3) FYI participants to access an employee’s online time sheet should not be necessary. Employee time sheet information is available on-demand at any time as a Banner report (PHR2TDN). Links to on-demand report printing in Banner are available on page 9 of these procedures.
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Links to instructions for producing/printing a report from Banner can be found at the end of this document and at http://www.alaska.edu/hr/hr-procedures/banner-data-entry/

<table>
<thead>
<tr>
<th>Approver Sequence</th>
<th>Approver</th>
<th>Approver Position</th>
<th>Approver or Incumbent</th>
<th>Approver Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>920661</td>
<td>Executive Director</td>
<td>10020792</td>
<td>FYI</td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td>Approve</td>
</tr>
</tbody>
</table>

To delete an FYI record in the NBAJQUE form, select the entry you want to delete and then select Shift-F6 or the Remove Record button.

**NBAJQUE Verification Report (NBR2JQE)**

This report has been specifically developed and designed to help PPAs/CCCs readily identify and correct issues. Potential issues with either the FYI or Approver set-up include:

1. The position (PCN) for an FYI in NBAJQUE is terminated as of the pay period end date.
   a. This issue prevents the employee from starting/submitting their time sheet until the terminated FYI’s PCN is unassociated with the employee record in NBAJQUE. Make sure that a proxy is in place for the terminated FYI or that a new FYI is entered. The employee may need to restart the timesheet for pay to be generated successfully.

2. An employee has no FYI assigned on NBAJQUE for their web time sheet.
   a. This does not impact the time sheet’s ability to be processed, but the desired business rule is that every employee have set-up a minimum of one FYI participant. The PPA or CCC should be added as an FYI so they are able to review the time sheets and help employees resolve issues in the web time sheet process.

3. A time sheet has additional FYIs (with "Approve" action) assigned on NBAJQUE, beyond the official time sheet approver assigned on NEA2SPE.
   a. An employee should have only one time sheet approver assigned on NEA2SPE for any given pay period. Any excess approvers on NBAJQUE should be removed and/or setup as an FYI in NBAJQUE unless approved through the campus HR office.

4. The position (PCN) entered in the Approver Position field does not have current employee ID or name associated with it.
   a. The PCN record must be removed or a correct PCN record entered in NBAJQUE before the employee can access their web time sheet.
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If either issue 1 or 4 (noted on the previous page) occurs for the employee's NBAJQUE record setup, the employee will encounter the following message when they attempt to access their time sheet in UAOnline:

⚠️ An approver for your web time entry has not been assigned for the pay period you selected.
Please report the error to your department administrator or supervisor for assistance.

If issue 2 or 3 may (noted on the previous page) occurs for the employee's NBAJQUE record setup, the employee will not encounter a problem accessing their time sheet. However, it is a good business practice to have all applicable data entered prior to payroll processing.

Banner Report Generation - GJAPCTL

To run a report in Banner, the report name may be entered in the Go To... field from Banner's main menu (see example below). Banner will automatically open the GJAPCTL form and the report name will default in the "Process:" field. You may also type GJAPCTL in the Go To... field and then enter the report name in the "Process" field.

The NBR2JQE report requires the entry of at least four parameters) to determine what information to include on the report:

1. Payroll Year – Required; max length 4; must be a year between 2010 and 2100
2. Payroll ID – Required; enter ‘BW’
3. Payroll Number – Required; max length 2, must be a number between 1 and 27
4. Chart of Accounts – Required; enter ‘B’
5. TKL – Optional; enter the full TKL (e.g. T175, T995); must be a valid TKL defined in Banner (in the Orgn field in the FTVORGN form)

To include multiple TKLs in the report, arrow down to the first open line, type "05" as the parameter number, TAB to the values section and enter the TKL. Repeat as necessary for any other TKLs desired.
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If you will be using the entered parameter value on a regular basis, you can save the parameter set with a user defined name (e.g., My_TKL_T100_150) and description to help identify the parameter values.

When you return to the GJAPCTL form to generate a NBR2JQE report in the future, you can use your saved parameters set names by selecting the down-arrow button next to the "Parameter Set:" field.

The following window is displayed. In the example below, a parameter set had previously been saved as “My_TKL.”

By double clicking the parameter set and using CTRL+Page Down, the original parameters are returned to the Process Submission Control form, saving you time in re-entering the information.
The **NBR2JQE** report will include the NBAJQUE setup for all employees for the given pay period for the TKL(s) entered in the parameter values. If no TKL was specified in the parameters, then employee records for all TKLs for the specified pay period will be included on the report.

The report data is ordered by time sheet TKL, then by employee name, ID, position, and suffix.

A full report (all UA employees set-up for online time sheets for the pay period) is generated each Tuesday morning of non-payroll processing weeks, and captured to Vista Plus. The report can also be run on-demand at any time as outlined on pages 6-7.

**NBA2JQE Validation Issues**

Each qualifying employee record will be checked for possible setup issues. Refer to the sample report on the following page for a corresponding example for each item below.

1. **A NBAJQUE record exists with a Required Action of “FYI,” but the FYI’s position is not active**.

   The message on the report will be **“FYI terminated.”**

   **Note:** An FYI’s position is only active if there is a position/suffix for which:
   a) the job Begin Date on the Base Job tab of NBAJOBS begins before the specified pay period End Date, AND
   b) the FYI’s job assignment End Date on the Base Job tab of NBAJOBS is open, or is after the specified pay period End Date.

2. **No FYI NBAJQUE record exists for the employee (the “Approver Action” column does not have an “FYI” defined).**

   The message on the report will be **“No FYI exists.”**

3. **An NBAJQUE record exists for the employee where the “Approver Action” column is set to “Approve.” Note: Approval of time sheets must be setup in NEA2SPE or NEA2SPR.**

   The message on the report will be **“Invalid approver.””**
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Additional information on producing, printing, and reviewing a report from Banner can be found at the links below:

- Printing Directly from Banner - GJAPCTL
  [http://www.alaska.edu/files/hr/banner.data_entry.gjapctl_direct_printing.pdf](http://www.alaska.edu/files/hr/banner.data_entry.gjapctl_direct_printing.pdf)

- Printing Quick Reference - GJAPCTL
  [http://www.alaska.edu/files/hr/banner.data_entry.gjapctl_quick_ref.pdf](http://www.alaska.edu/files/hr/banner.data_entry.gjapctl_quick_ref.pdf)

- Viewing Reports is Banner - GJIREVO
  [http://www.alaska.edu/files/hr/banner.data_entry.gjirevo_instructions.pdf](http://www.alaska.edu/files/hr/banner.data_entry.gjirevo_instructions.pdf)

- Saving/Deleting Reports in Banner - GJIREVO
  [http://www.alaska.edu/files/hr/banner.data_entry.gjirevo_saving_deleting.pdf](http://www.alaska.edu/files/hr/banner.data_entry.gjirevo_saving_deleting.pdf)