# Self Service Banner

Radford University utilizes the Ellucian Enterprise Resource Planning (ERP) system, Banner, to manage its business processes and operations. The ERP system is made up of different modules, each of which includes different types of information that may be accessed by two different interfaces: administrative and self-service.

The University has utilized the ERP system and both interfaces in various versions since 2009. Ellucian underwent an overhaul of its ERP system to modernize and enhance user experiences. The University previously provided the upgraded version of the administrative interface. The goal of this reference guide is to focus on the enhancements from the upgrade of the self-service interface to the following modules:

- General: Personal information (e.g., address, phone, email, and emergency contact)
- Employee: Time/leave reporting & approval and Pay information
- Electronic Personnel Action Forms (EPAF)

The advances to the General and Employee modules in self-service are intended to provide a modern, mobile-friendly interface, supervisor access to team information, and improved functionality for employee experience.

Radford UNIVERSITY | Human Resources

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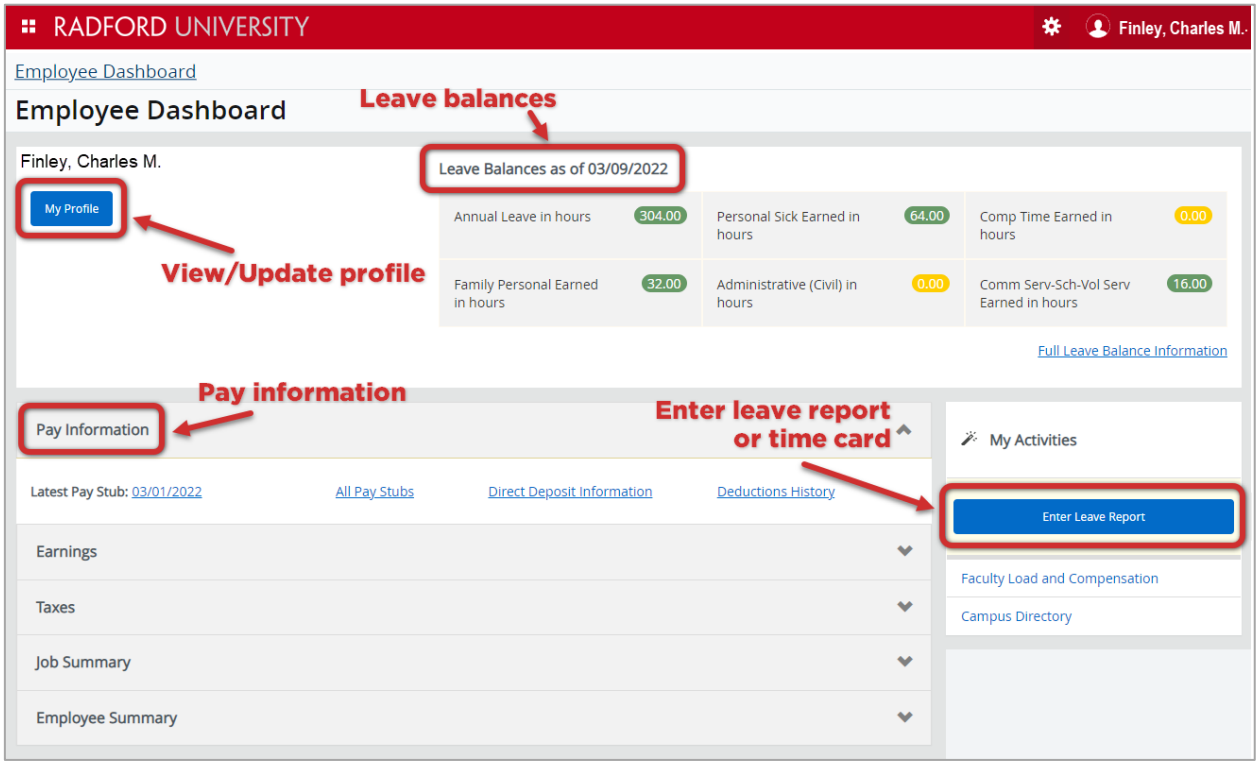
## Accessing Self-Service Banner

Sign into OneCampus account by clicking *Sign In* and entering the appropriate Radford University identification information:

After logging into OneCampus, search for the *Finance & Admin Dashboard* tile:

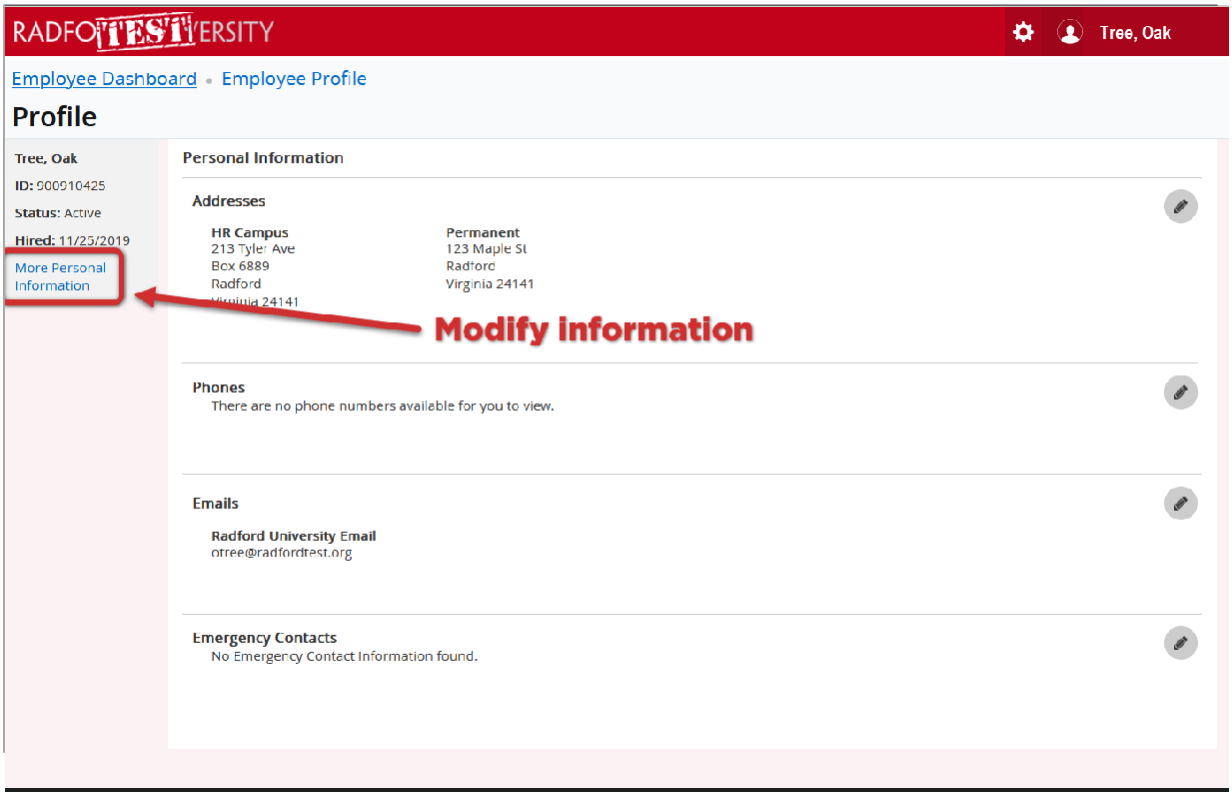
# Employee Dashboard

From the *Employee Dashboard*, users will be able to update personal information via *My Profile*, review leave balances, enter a *Leave* or *Time Report*, and view pay information.

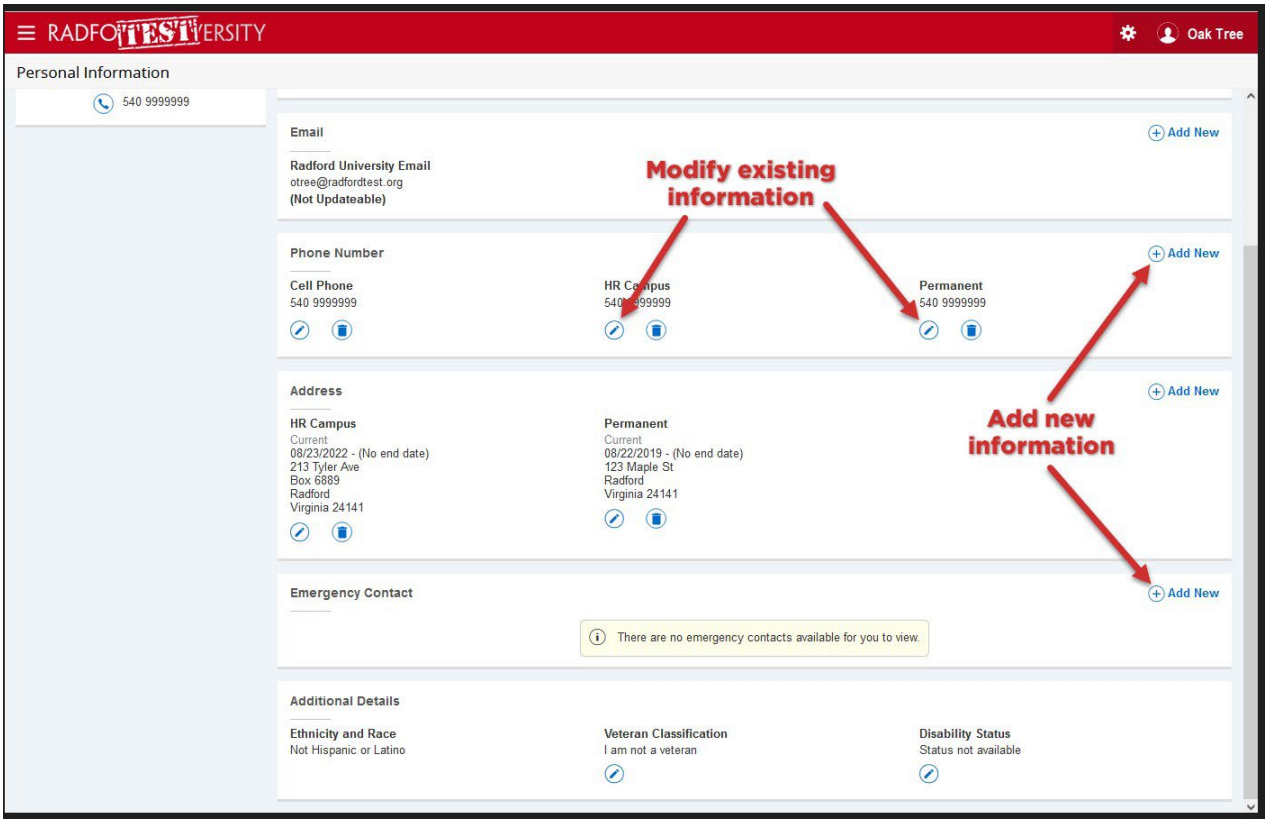


# My Profile

*My Profile* allows users to review and modify existing profile information. To modify any information, click the *More Personal Information* icon on the left:

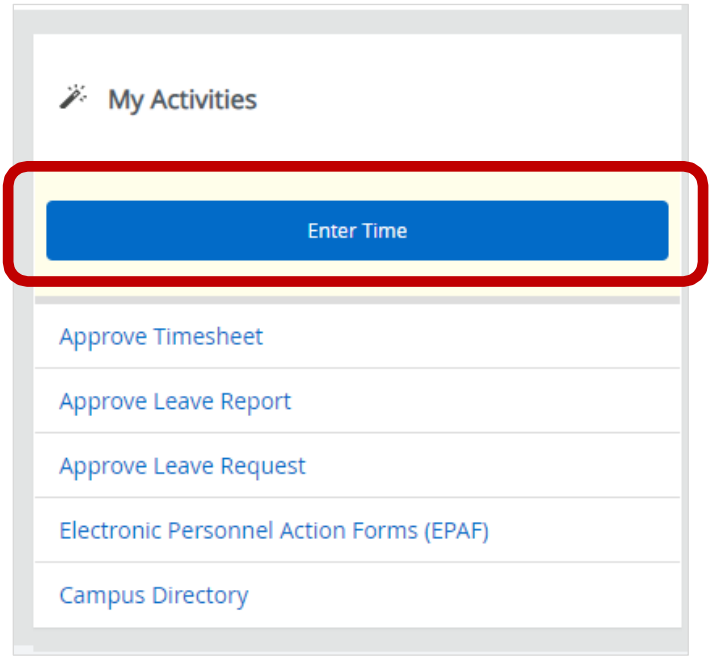



To modify existing information, click on the pencil in the designated area. If information needs to be added, click on *Add New.* Note: Human Resources does not utilize the Mailing address. The *Permanent Address* is utilized for communications and sharing with Virginia Retirement System, health insurance and group life insurance.

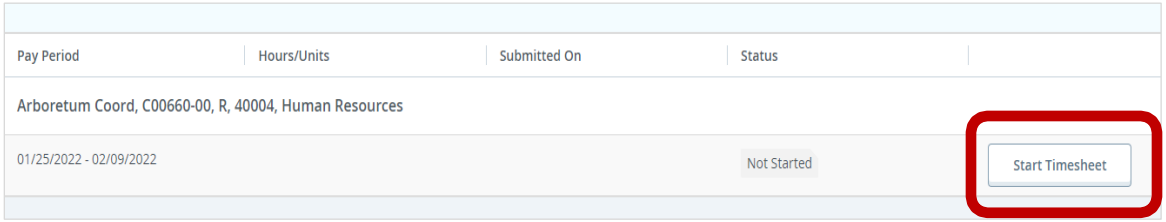

RADFORD TEST VERSITY
Oak Tree
Personal Information
540 9999999
Email
Add New
Radford University Email
otree@radfordtest.org
(Not Updateable)
Modify existing information
Phone Number
Add New
Cell Phone
540 9999999
HR Campus
540 9999999
Permanent
540 9999999
Address
Add New
HR Campus
Current
08/23/2022 - (No end date)
213 Tyler Ave
Box 6889
Radford
Virginia 24141
Permanent
Current
08/22/2019 - (No end date)
123 Maple St
Radford
Virginia 24141
Add new information
Emergency Contact
Add New
There are no emergency contacts available for you to view.
Additional Details
Ethnicity and Race
Not Hispanic or Latino
Veteran Classification
I am not a veteran
Disability Status
Status not available

## Entering a Timesheet

The *Employee Dashboard* provides access to time entry in *My Activities* by clicking *Enter Time.*




On the *Timesheet* page**,** click *Start Timesheet***.**



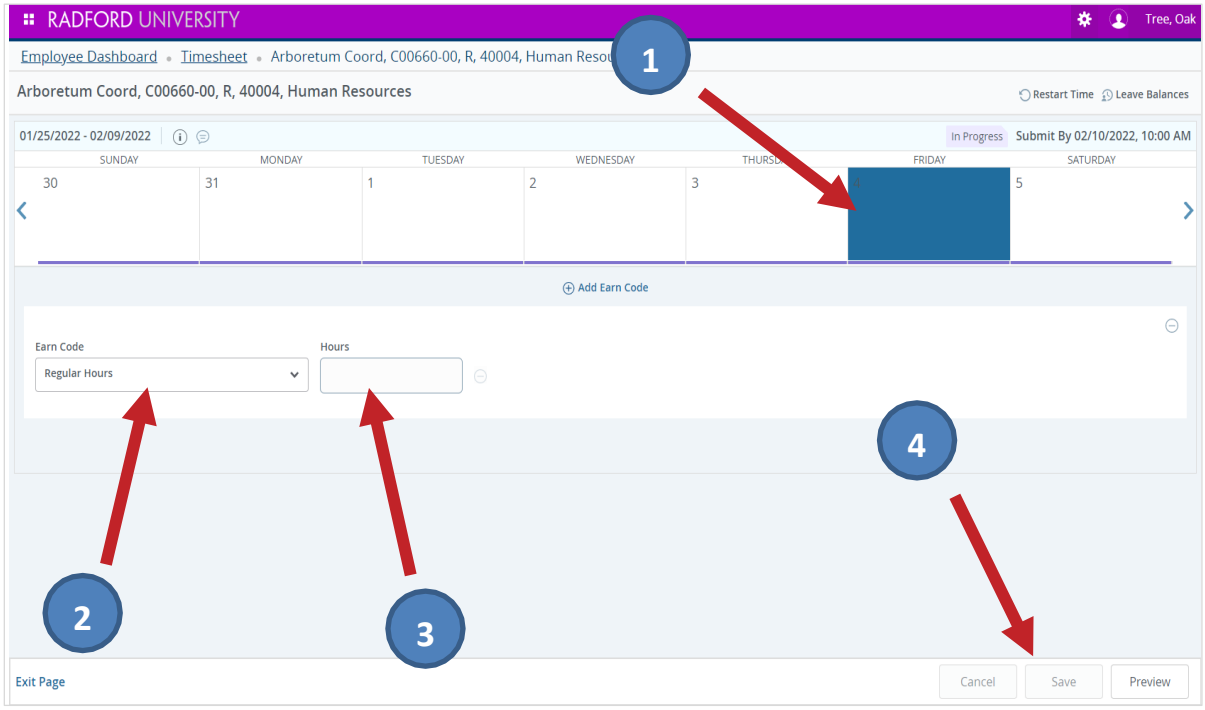

**Please Note: Time reporting depends on the employment relationship with Radford University, which is broken down as follows:**

- **Classified and A/P staff** who are non-exempt, eligible for overtime will submit timesheets for each period, reporting total hours worked and leave taken each day. The appropriate Earn Code is selected from the drop-down menu (ex: Regular Hours Worked, Annual Leave Taken, Personal Sick Taken)

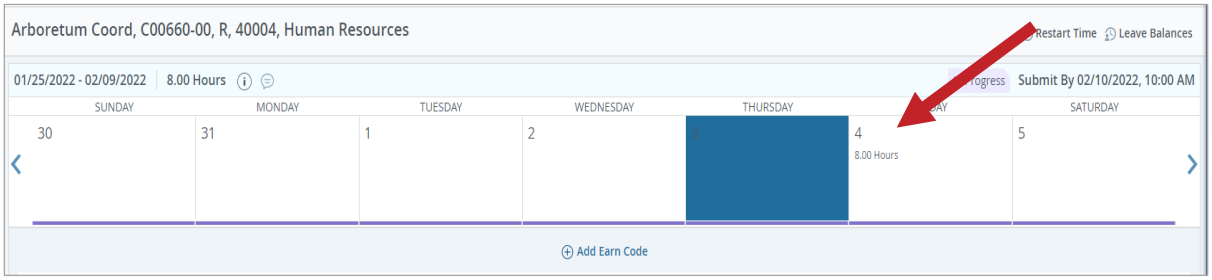
- **Bi-weekly wage employees** (i.e., student, 1500-hour wage, and temporary wage) will submit time reports for each workday by eligible Earn Code. Employees report time of day work was started and completed along with breaks taken in a manner similar to clocking in and clocking out. For example, if a lunch break is taken, time would be entered as time out when lunch began and time in when the lunch break ended and worked resumed.

**Non-Exempt Classified and A/P staff**

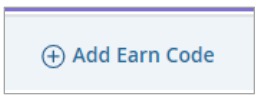
To enter hours worked, begin by clicking on a day in the calendar. After selecting a day, make the appropriate selection from the *Earn Code* dropdown. Finally, enter the *Hours* worked or leave time taken. Confirm that the information is correct and click the *Save* button.




Upon saving, the hours appear on the appropriate day in the calendar. In the example below, 8 regular hours were entered on Friday the 4th.

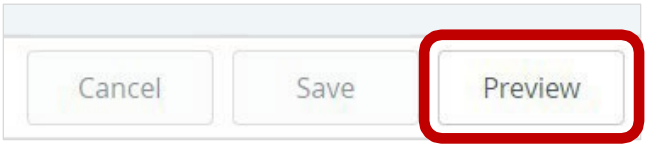



To add additional hours to a day using a different earn code, click on the *Add Earn Code* option beneath the calendar.

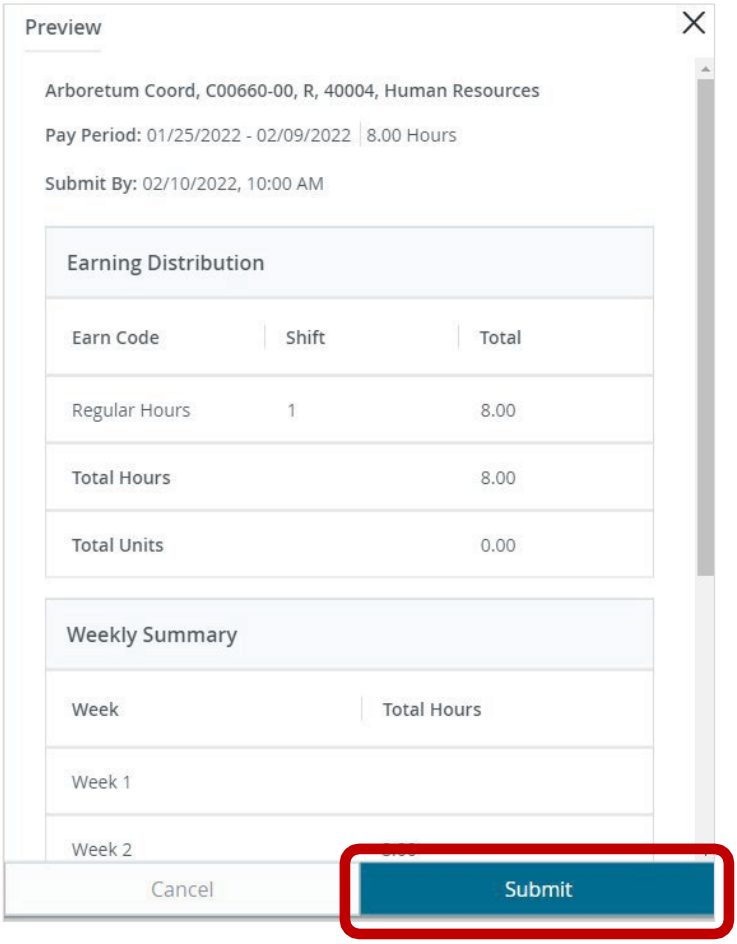


Once again, make the appropriate selection from the *Earn Code* dropdown, enter the *Hours* worked or leave time taken, and click *Save*.

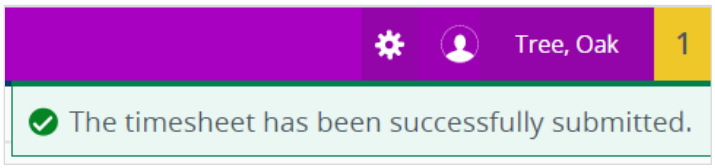
When finished adding time, click *Preview*.




From the pop-up window, make sure that all time entered is accurate. When finished, click *Submit* .



After submitting, make sure to receive a confirmation message before ending the session.

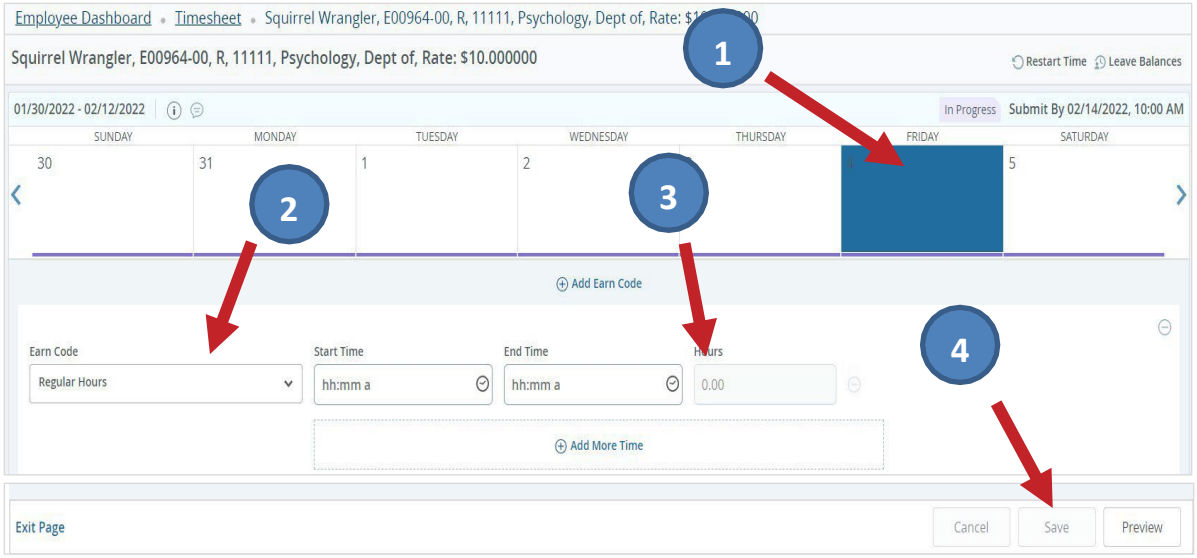


**Bi-Weekly Wage Employees**

To enter hours worked, begin by clicking on a day in the calendar. After selecting a day, make the appropriate selection from the *Earn Code* dropdown.

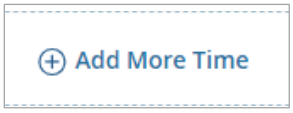
Enter the *Start Time* and *End Time* of the workday with the hour followed by minute to the nearest 15-minute increment. If a lunch break was taken, enter the time lunch began as *End Time* and the time returned from lunch as *Start Time*.

Press *Enter* after the entry; the total *Hours* will then calculate. Confirm that the information is correct and click the *Save* button.



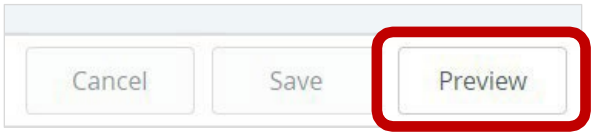

Once saved, the hours entered should appear on the appropriate day in the calendar.

To add additional hours to a day, click *Add More Time* option beneath the calendar.

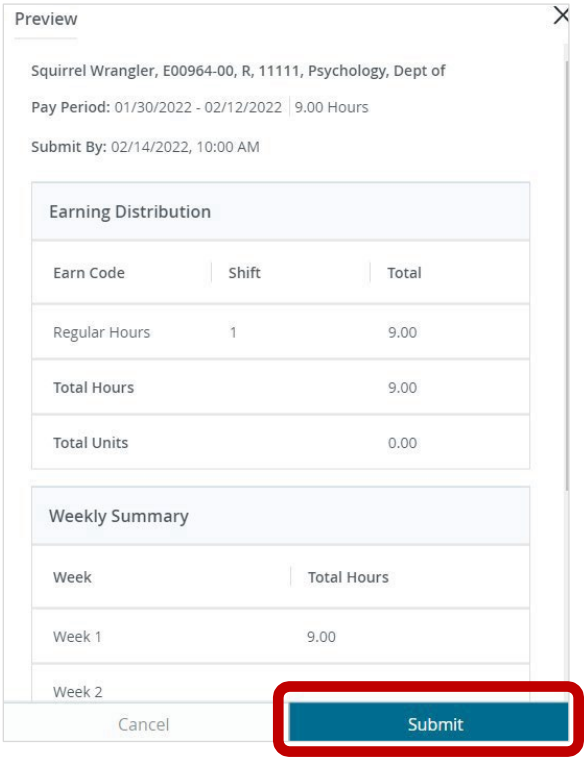



To enter additional hours worked, begin by clicking on a day in the calendar and repeat from the beginning of this section for **Bi-Weekly Wage Employees**.

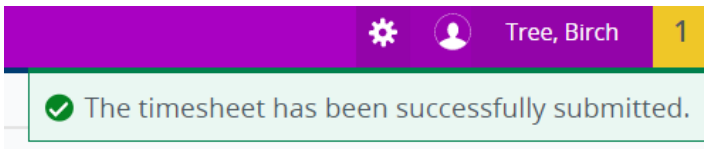
After all time has been added for the pay period, click the *Preview* button.




From the pop-up window, make sure that all of your entered time is accurate. Click *Cancel* to edit any time entered. When you are finished, click *Submit*.

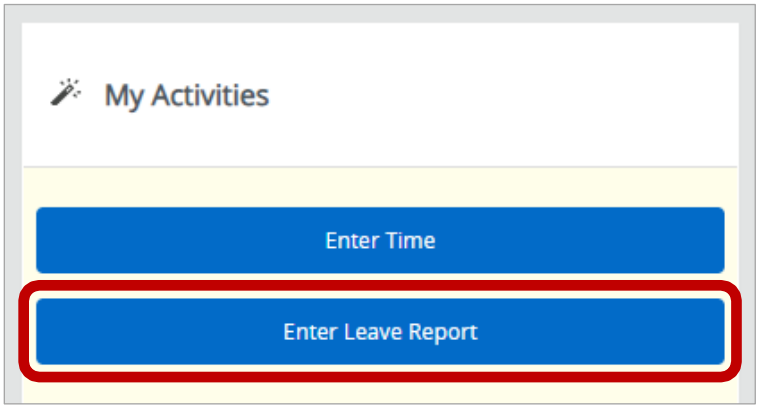



After submitting, make sure to receive a confirmation message before ending the session.

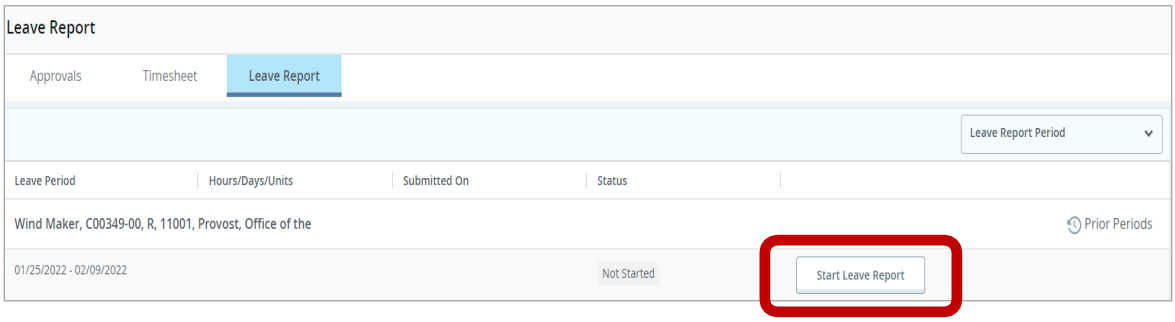


# Entering a Leave Report

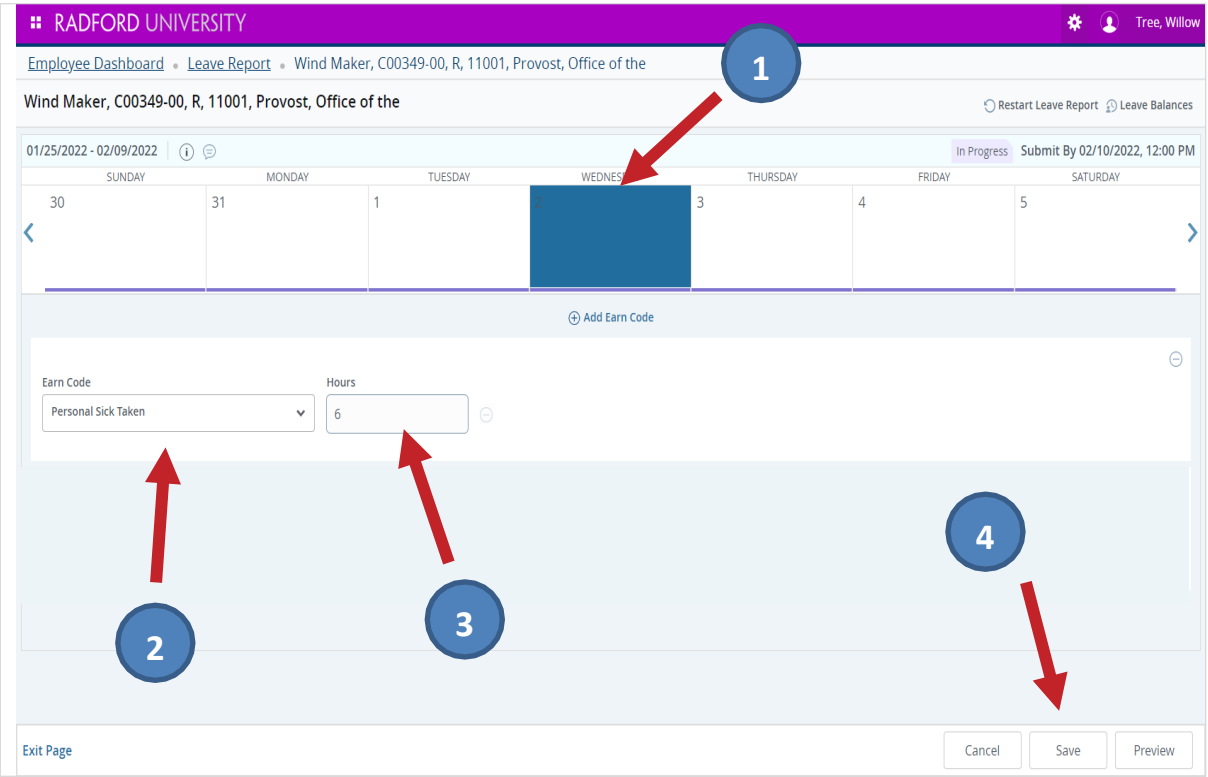
From the **Employee Dashboard**, exempt classified and A/P employees should have access to click *Enter Leave Report* under *My Activities.*




On the *Leave Report* page, click *Start Leave Report*.

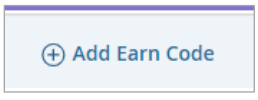


To enter leave hours taken, begin by clicking on a day in the calendar. After selecting a day, make the appropriate selection from the *Earn Code* dropdown and enter the *Hours* of leave taken. Confirm that the information is correct and click the *Save* button.



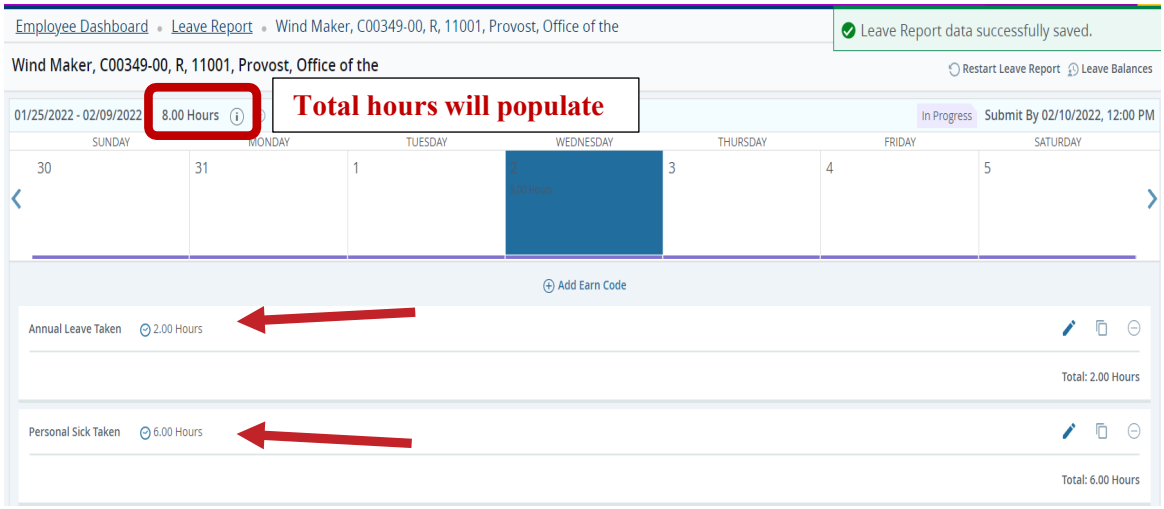

The hours entered should appear on the appropriate day in the calendar.

To add additional leave hours to a day using a different earn code, click on the *Add Earn Code* option beneath the calendar.

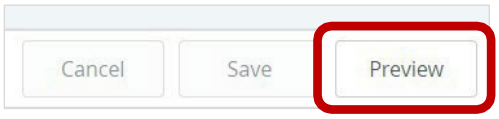



Make the appropriate selection from the *Earn Code* dropdown, enter the *Hours* of leave taken, and click the *Save* button.

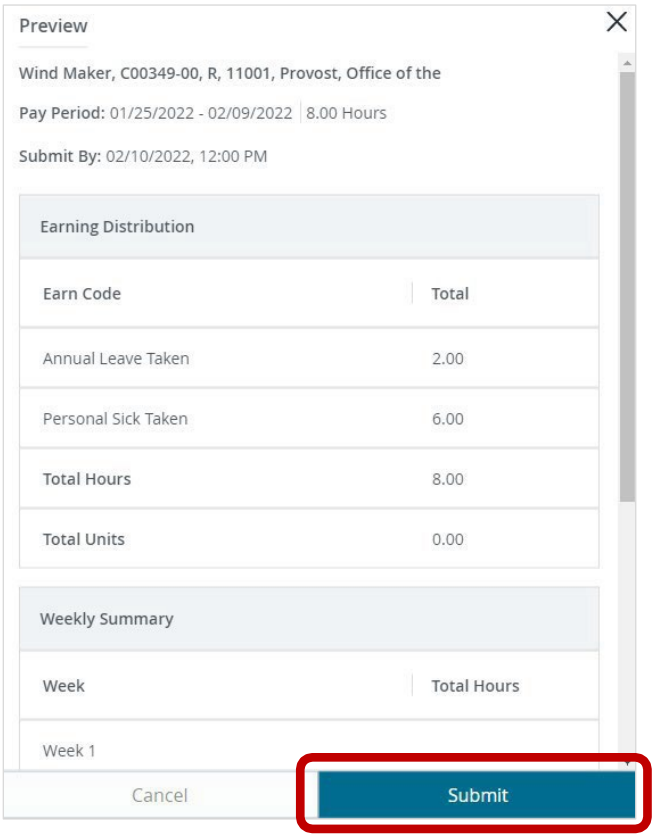
The hours entered should appear on the appropriate day in the calendar. In addition, the total hours will populate above the calendar. In the example below, 6 hours of Personal Sick Leave and 2 hours of Annual Leave were entered on the 2nd.



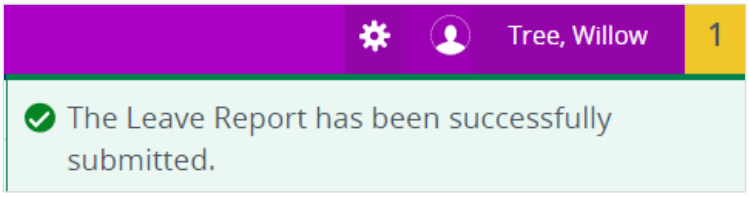

When finished adding time, click *Preview*.



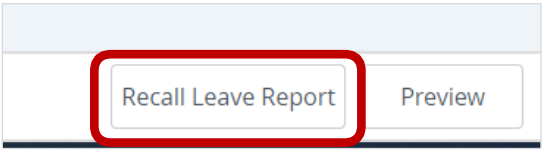
From the pop-up window, make sure all leave entered is accurate. When finished, click *Submit*.




After submitting, make sure to receive a confirmation message before ending the session.



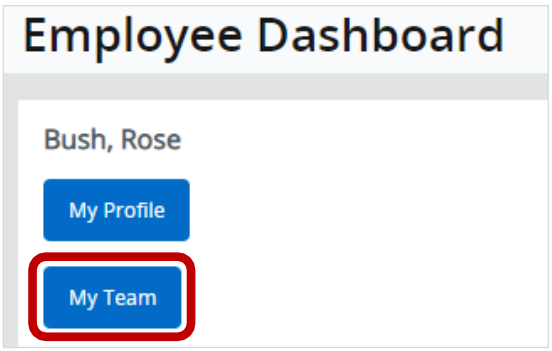
NOTE: Any corrections or modifications that are needed to a leave report not yet approved by the supervisor may be recalled. Access the *Leave Report* and select *Recall Leave Report*.



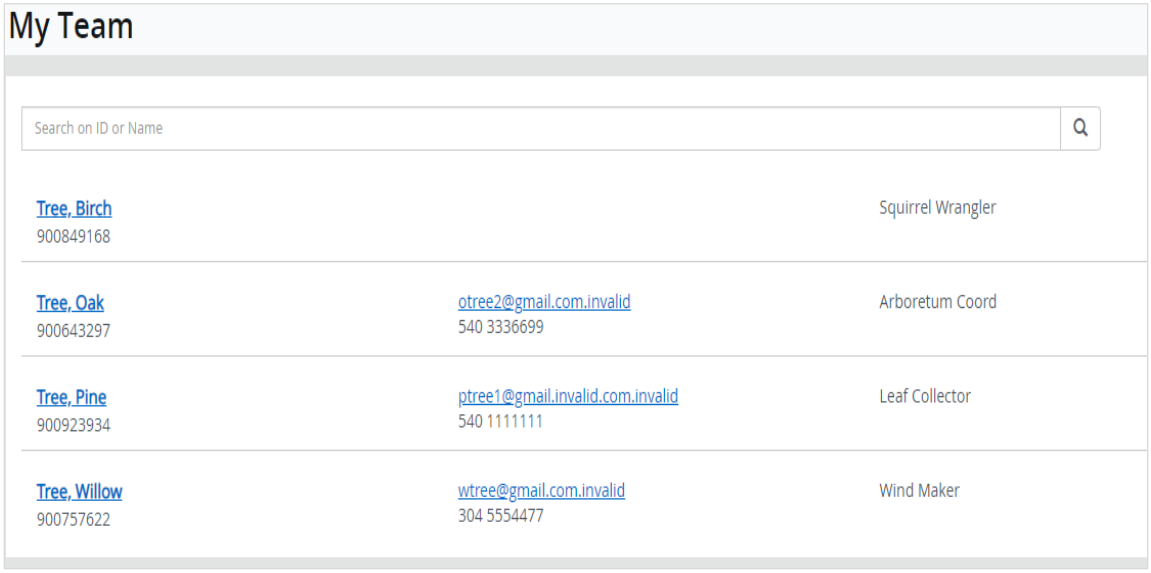

Once recalled, follow the previous steps to modify the report and resubmit for approval.

## My Team

Supervisors with active employees will have access to team information via *My Team*.

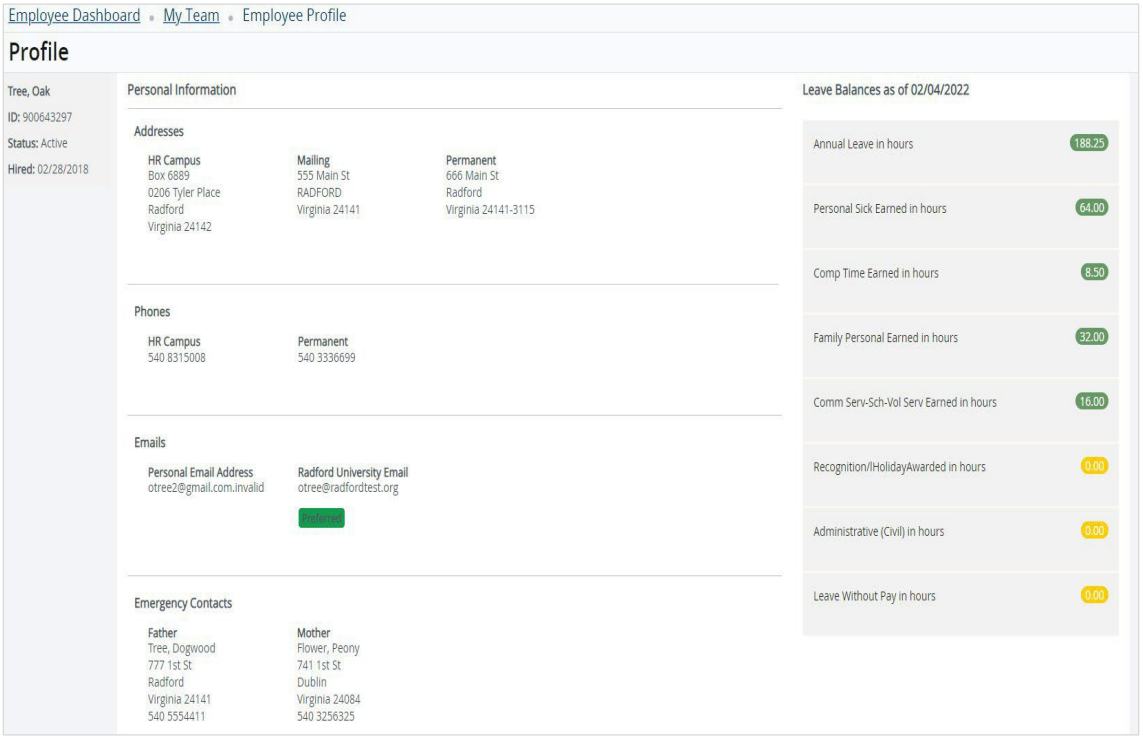



Upon clicking *My Team*, team information will be available.



# Employee Profile

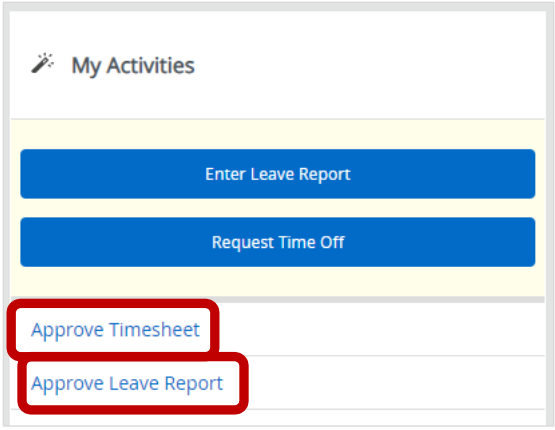
The *Employee Profile* of a team member may be accessed upon clicking on a team member's name or by using the *Search* field to narrow results in *My Team*. Information such as addresses, phone numbers, emails, emergency contacts, and leave balances are provided in an employee's profile.



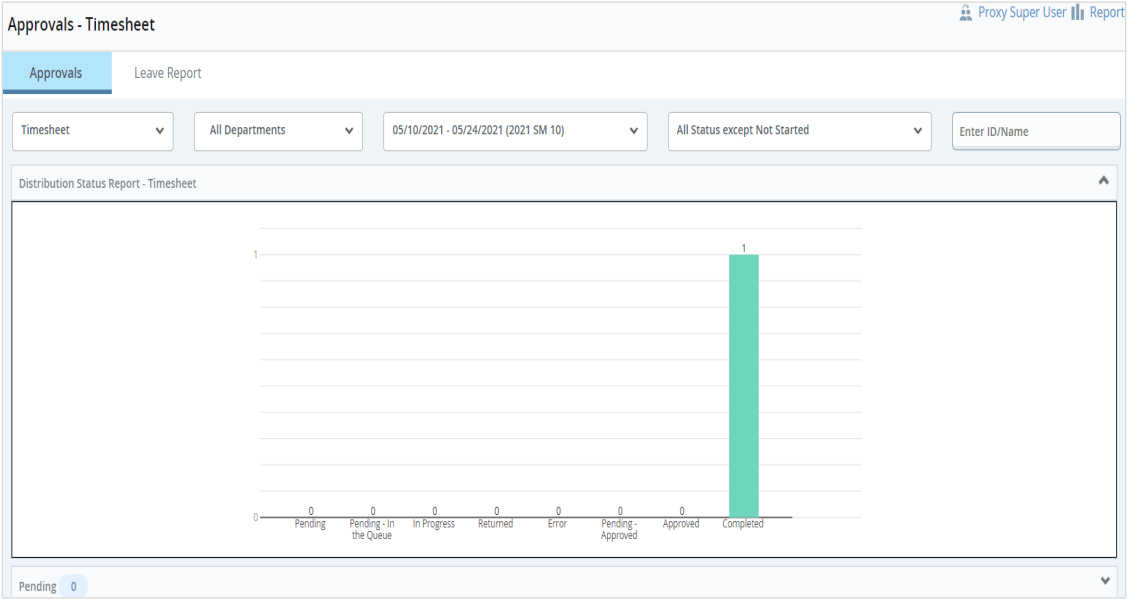
# Approving Timesheets and/or Leave Reports

Supervisors will utilize the *Employee Dashboard* to approve all timesheets and leave reports.

To begin, select *Approve Timesheet* and/or *Approve Leave Report* under *My Activities*.

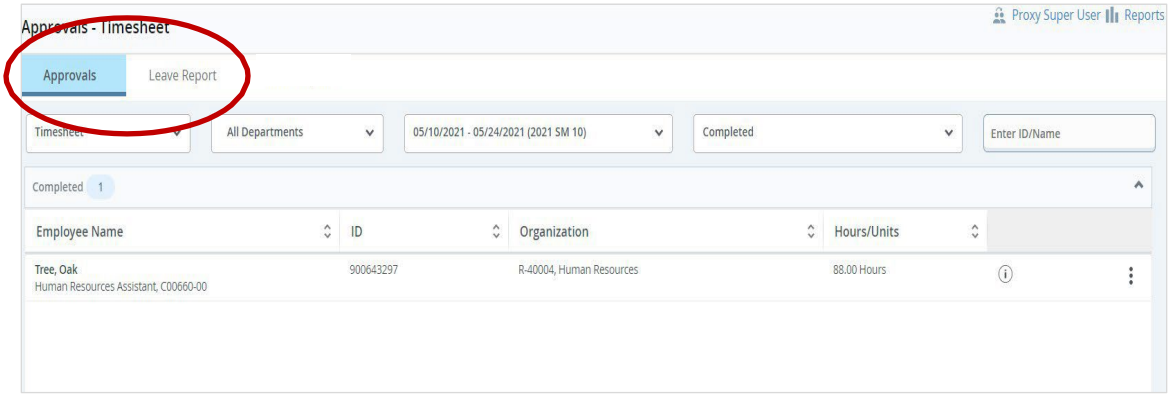



A *Distribution Status Report* will indicate the status of the timesheets or leave reports for the team. Click on the various status bars to access the details of timesheets or leave reports within each status.



Once a timesheet or leave report is in the *Pending-Approval* status, supervisors should be able to take action on the report.

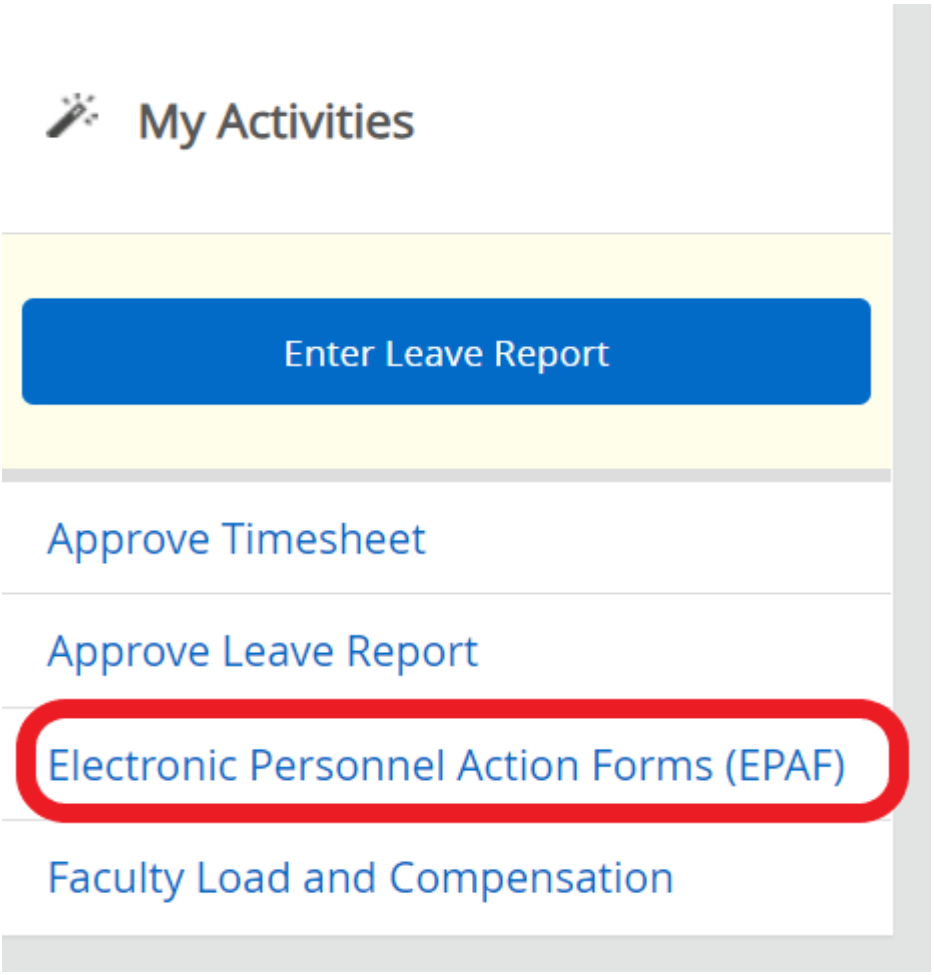
The option is also available to review a leave report by selecting the *Leave Report*.



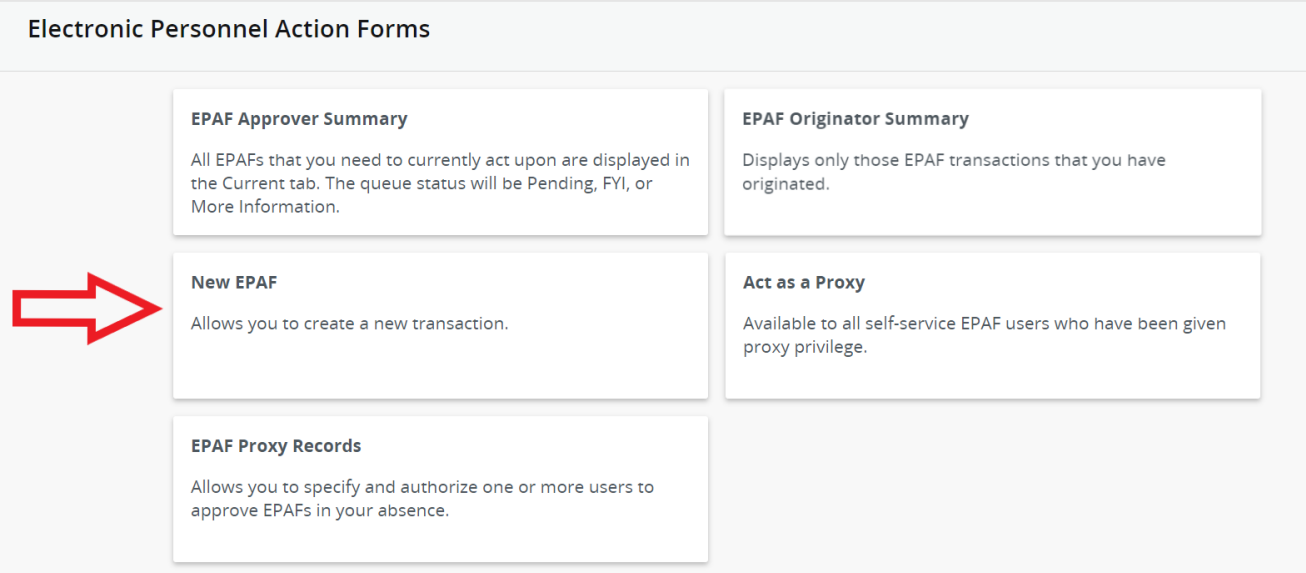

Human Resources may be contacted at (540) 831-5008 with any questions and/or feedback regarding the Employee Dashboard.

## Entering Electronic Personnel Action Forms (EPAF)

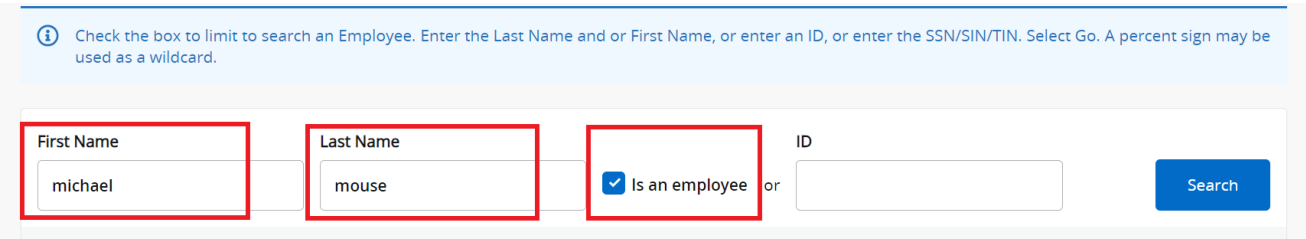
The *Electronic Personnel Action Forms (EPAF)* module may be accessed upon clicking on the Electronic Personnel Action Forms (EPAF) tab on the right-hand side under *My Activities*.



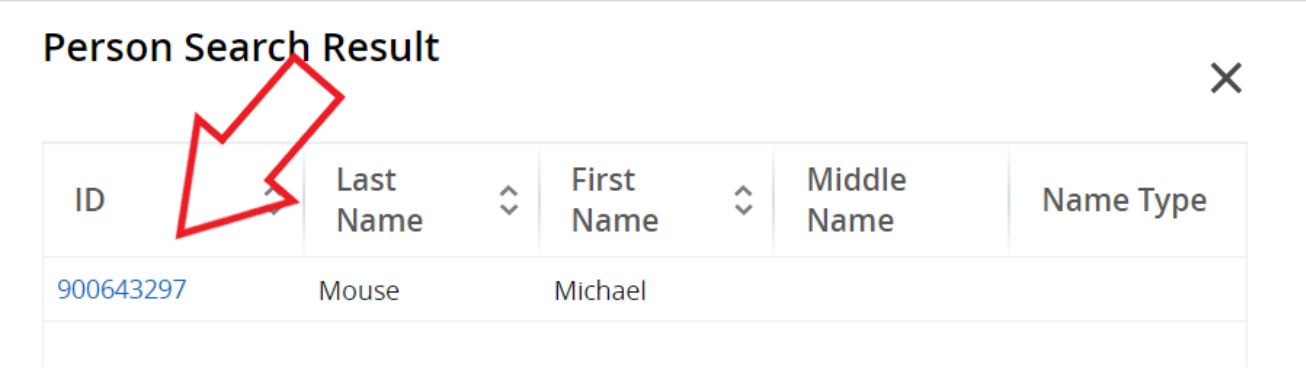
To create a new EPAF, choose *New EPAF*.



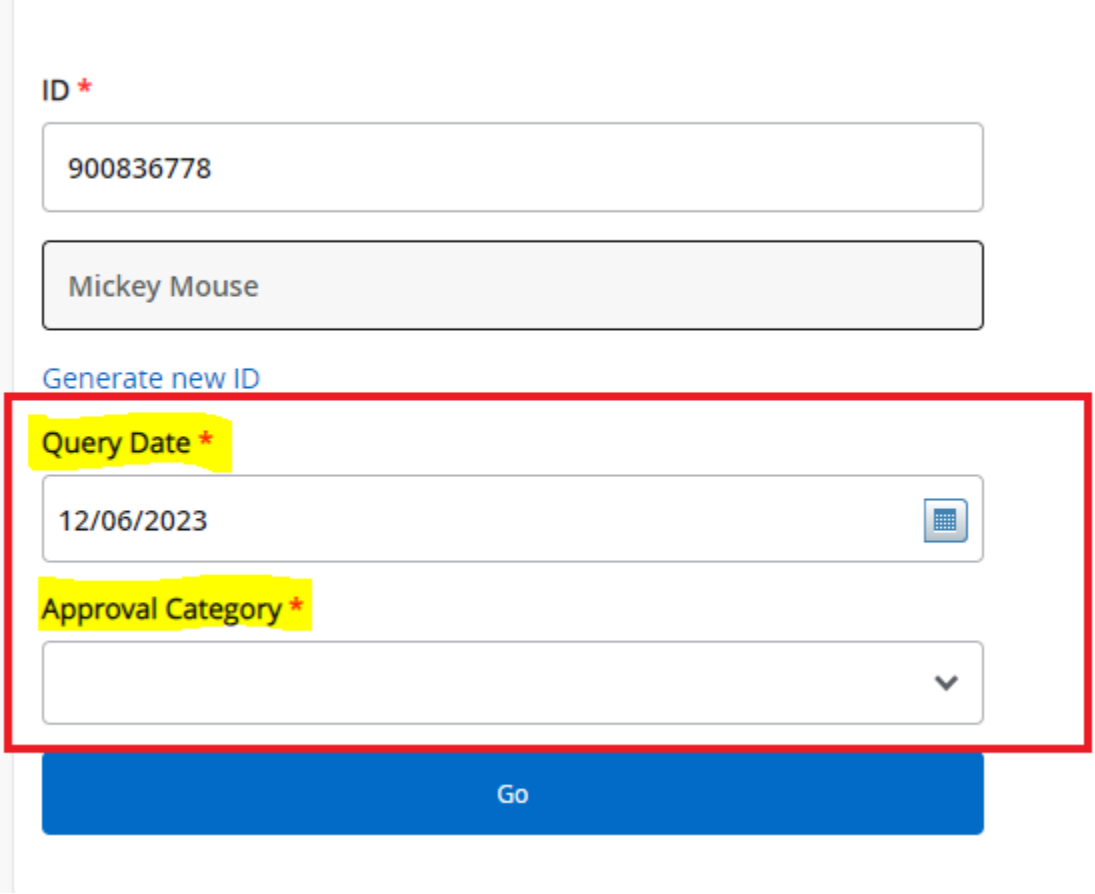

On the next screen, enter the employees ID if it is known to create the EPAF on that person. If the ID number is not known, it can be retrieved by entering the person's *first name* and *last name* and selecting *Search*. The search works for legal name so do not enter the preferred name in the first name field. Click the button for *Is an employee*, this will let the system to only look at names in the system who have been assigned as an employee.




You will receive a listing of name matches from your search. If there are multiple employees with the same name returned, choose the correct record by selecting the ID number.



Once you have chosen the employee, scroll down on the page and enter the *Query Date* and the *Approval Category*. The *Query Date* should reflect the timeframe of the action, typically the current date since it is recommended that actions NOT be backdated. The *Approval Category* is stating what kind of action you wish to do (i.e. Job Termination, Wage Continuation, Supervisor Change, etc). All job assignments for the employee is at the bottom of the screen. Once the *Query Date* and the *Approval Category* have been entered, select *Go*.



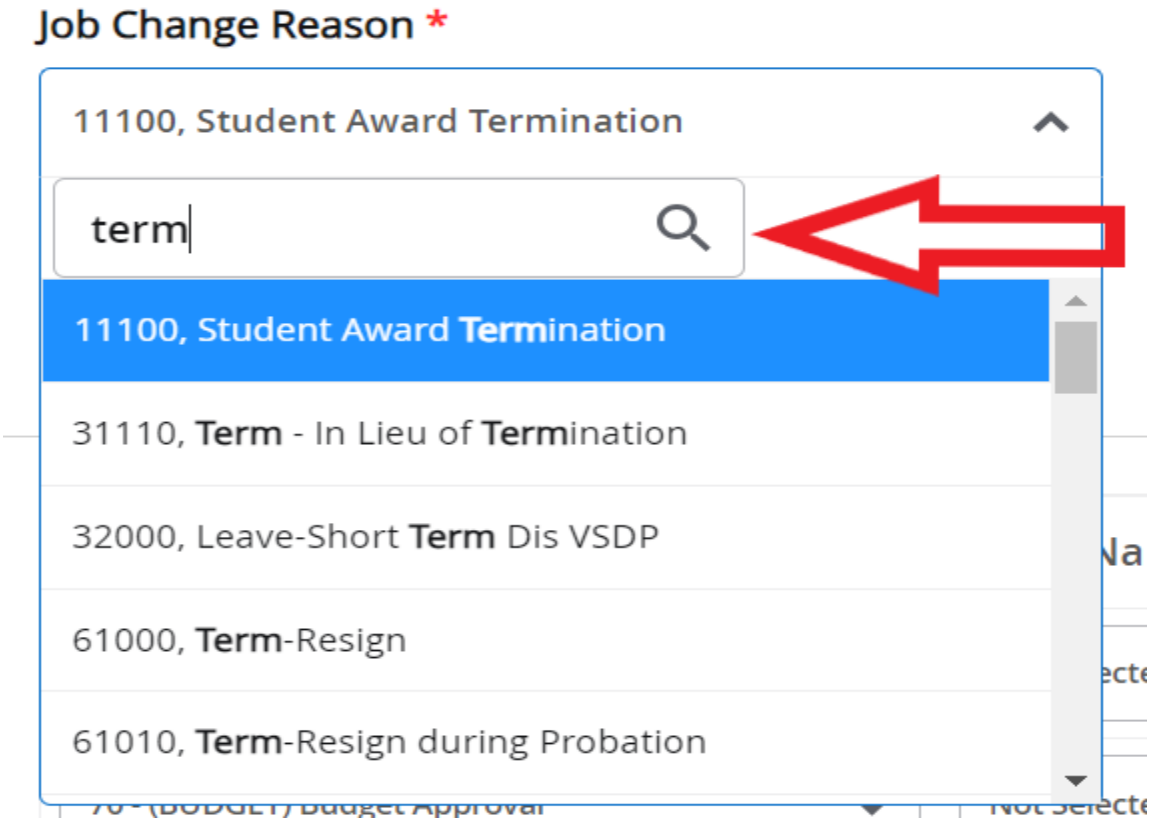

On the next screen, choose the job you wish to make a change on. This is accomplished by clicking in the box under *Select*. Click *Go*.

Though it is recommended that actions NOT be backdated, sometimes it is necessary to backdate an action prior to the last date paid. In this case the *Jobs Effective Date* will be the day after the last paid date, and the *Personnel Date* will need to be the date the action became effective.

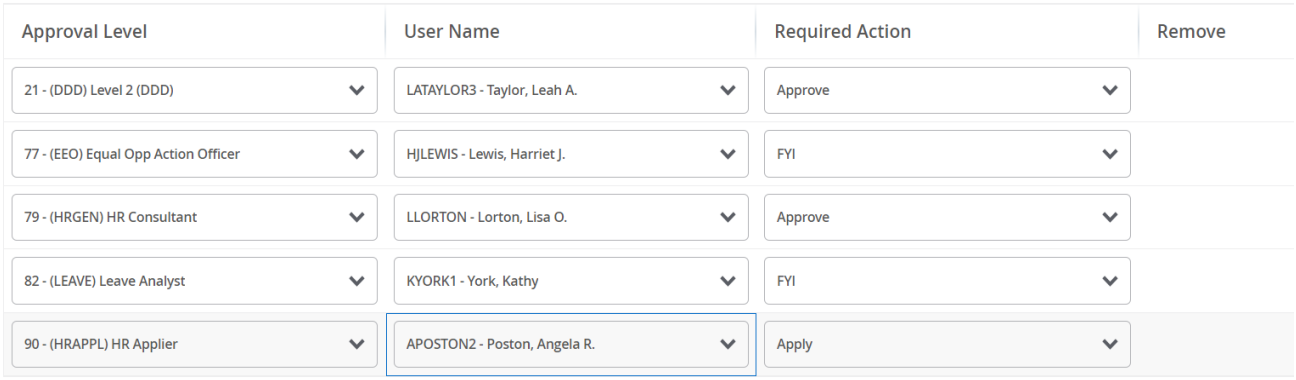
Example: A termination EPAF was not performed on a person whose last day was 08/01/2023. The last time the employee was paid is 08/24/2023. The *Jobs Effective Date* should be entered as 08/25/2023, the day after the last paid date. However, the *Personnel Date* should be 08/01/2023, the date the action became effective.

If you are not backdating an action, the dates will both be the future date of the action.

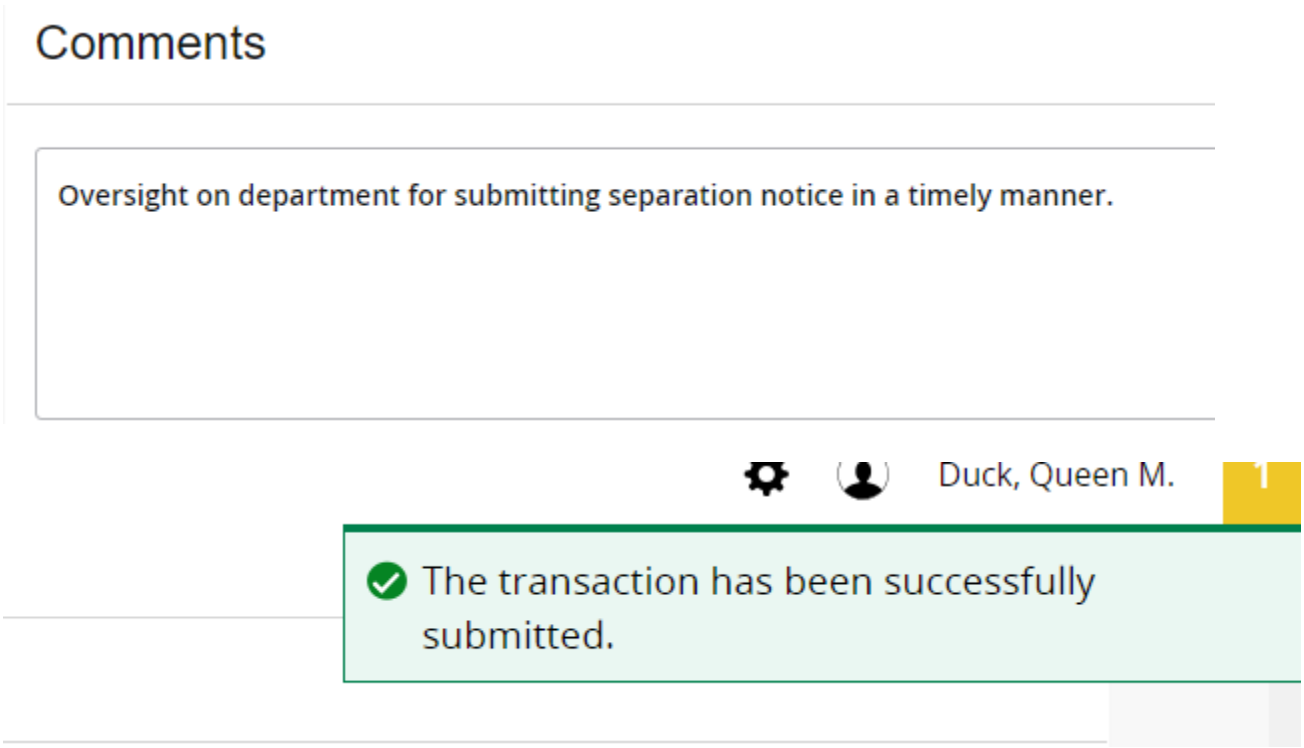
Choose the correct *Job Change Reason,* there is a search feature if you want to search on a key word. For example, all terminations start with "term"; therefore, term could be entered to narrow the search down.



Once the job change reason has been completed, assign the routing queue for approvals. For the approval levels listed, assign the appropriate person by selecting the down arrow for each level under the User Name column and selecting that person.

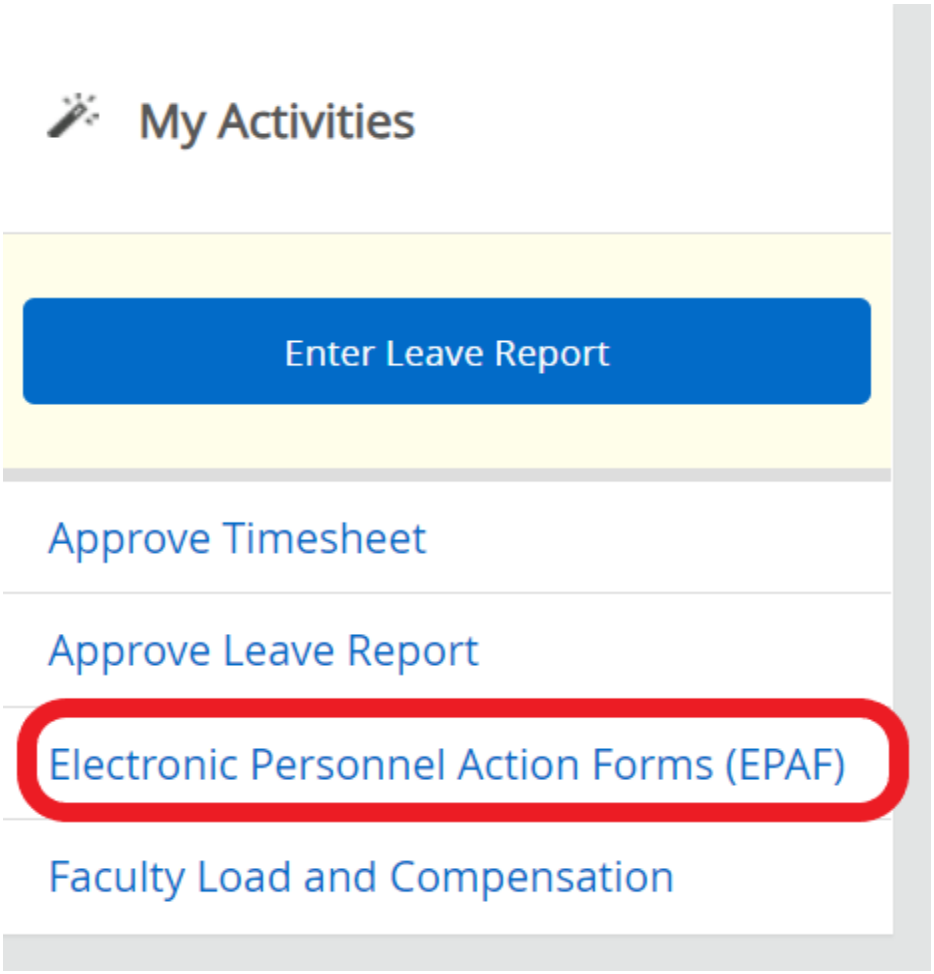



Comments may be added to provide the approvers additional information about the action. When complete select *Save* and if there are no errors, select *Submit.* If successfully submitted, there will be a message in the right corner or the screen indicating the submission was successful.

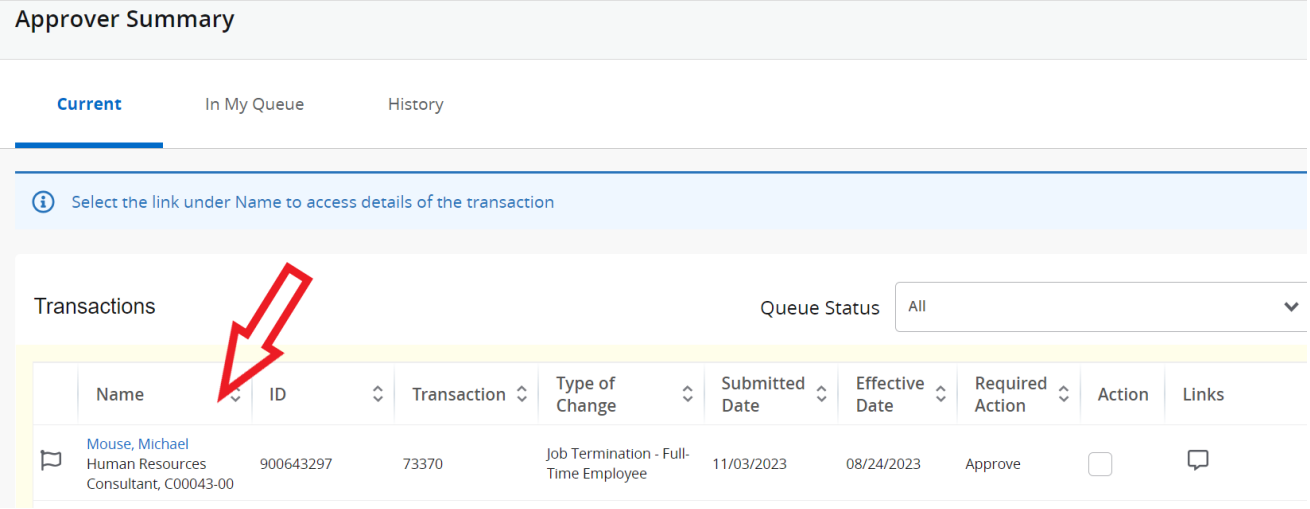


## Approving Electronic Personnel Action Forms (EPAF)

The *Electronic Personnel Action Forms (EPAF)* module may be accessed upon clicking on the Electronic Personnel Action Forms (EPAF) tab on the right under *My Activities*.

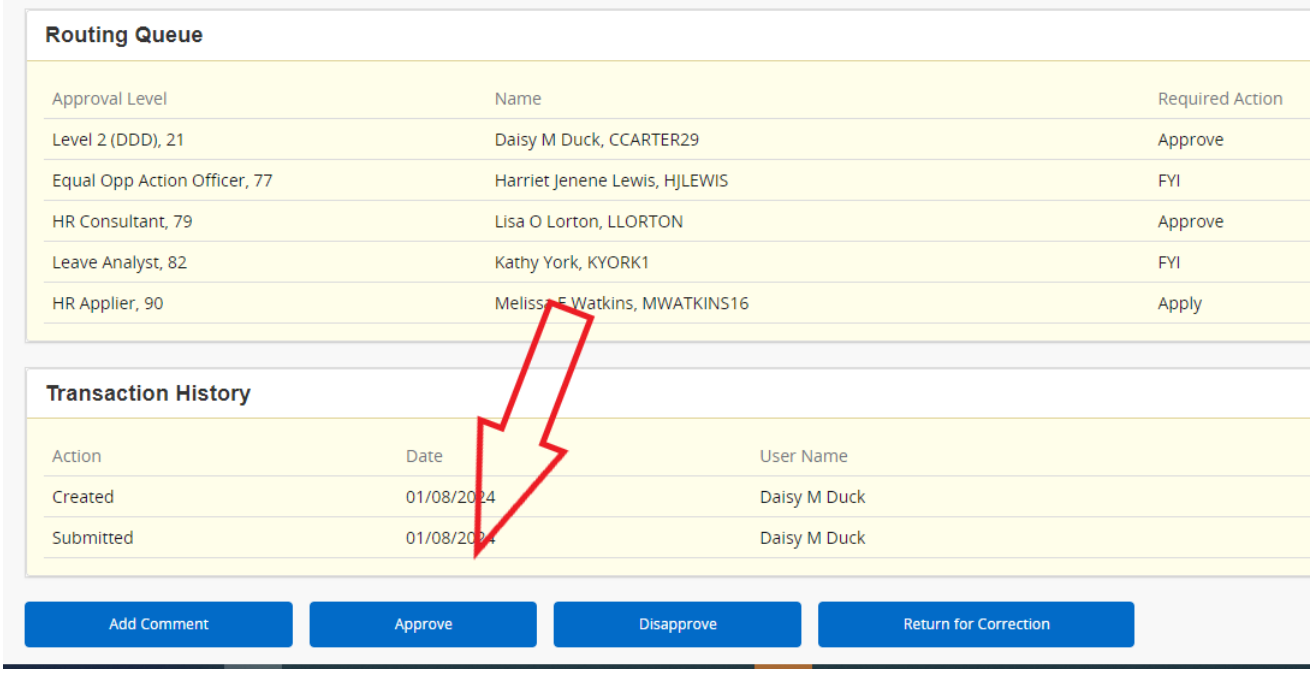


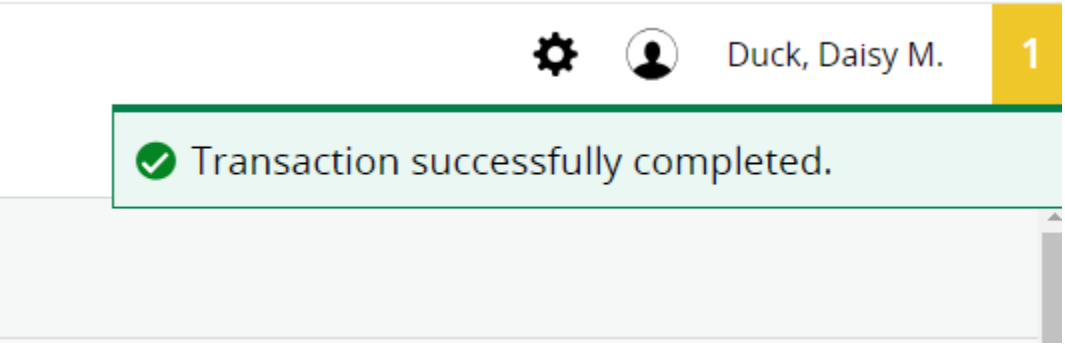
To approve an EPAF, click on *EPAF Approver Summary*. On the next screen you will see all of the EPAF's that are in your queue for approval. Click on the employees name of the action you want to verify and approve or disapprove.




Before approving or disapproving the EPAF, it is imperative for the DDD (Dean, Director, Department Head) or the assigned proxy to review the data entered, to include the *Effective Date, Personnel Date, Job Status, and Job Change Reason Code*.

After review, the DDD or assigned proxy will need to determine how to move the action forward. There are multiple choices available, which include *Add Comment, Approve, Disapprove, Return for Correction.* If all is properly documented and the action is approved, scroll to the bottom of the screen and select *Approved.*




Once *Approve* has been selected, a notification on the upper right corner should show *Transaction Successfully Completed*