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<th>Page</th>
</tr>
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INTRODUCTION

Overview

Welcome to the TM300 – Time Administration class.

The course introduction is an opportunity to get to know others who are attending class as well as to agree on courtesy for the training session. There will be at least one break during this session.

Prerequisites

- Time Overview - TM200
- Introduction to Time Management - TM220

There are two pre-requisites that you must take before attending this class. Attending or taking these pre-requisites ensures that you are prepared to learn the new processes, concepts, terms, and data entry skills that are covered in this course.

Integrated HR/Payroll System Training Curriculum

The Integrated HR/Payroll System training program comprises several courses and different modules. Based on your HR/Payroll role, you will attend courses in the Time Management module.
As noted in the pre-requisites, this class is preceded by the web-based course TM220 – Preliminary Material for Time Administration.

Strategy for Training

**TELL ME (Concepts)**

Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

**SHOW ME (Demonstrations)**

Instructor will demonstrate job-related tasks performed in the Integrated HR/Payroll System – HANDS OFF.

**LET ME (Exercises)**

Student will complete the exercises which allows for hands-on practice in class – HANDS ON

**SUPPORT ME (Availability)**

Instructor will be available to answer questions while the students complete the exercises
Course Map

You may see the Course Map of the class at the beginning of each lesson. The lessons covered in this class include:

- Lesson 1: Time Administration Overview
- Lesson 2: Quotas and System Behaviors
- Lesson 3: Time Recording
- Lesson 4: Advanced Time Reporting
- Lesson 5: Time Evaluation and Time Transfer Specifications
- Lesson 6: Reporting and Troubleshooting
- Lesson 7: Course Review

The Time Administration Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the Integrated HR/Payroll System training environment.

Course Objectives

This course is designed to provide you with knowledge and skills necessary to perform Time Administration in the Integrated HR/Payroll System.

Upon completion of this course, you should be able to:

- Describe Time Administration process
- Describe time Roles and Responsibilities
  - Time Administrators vs. ESS
  - Describe how work schedules may affect quotas and pay
- Define new time recording terms and concepts
- Identify time codes using Time Administration Quick Reference Guide
- Review work schedules
- Describe premium pay eligibility
- Perform review of leave quotas
- Record, review, and correct time in the Integrated HR/Payroll System
- Describe system behaviors
• View common time evaluation error messages
• Perform general time reporting and troubleshooting

Reference Materials

State Agency Resources Website:
• Login – Integrated HR/Payroll System
• HR/Payroll Customer Services Website:
  ° BEST Shared Services Contact Information
  ° Support Material
    • Payroll Calendars
  ° BEST Forms
  ° HR/Payroll System – System Status Log

OSC Training Website:
• HR/Payroll System Courses
  ° Student Guide
• Help Documents
  ° Job Aids
  ° Business Process Procedures (BPPs)
    • Step-by-Step Work Instructions

The materials above can be accessed through the OSC Training HELP website. Use the following link to access the HELP website:

https://www.osc.nc.gov/state-agency-resources/training
LESSON 1: TIME ADMINISTRATION OVERVIEW

Objectives

- Describe the Time Administration process
- Describe Time Roles and Responsibilities
  - Time Administrators vs. ESS
- Define new time recording terms and concepts
- Review work schedules
- Describe premium pay eligibility

Time Administration Process

The process flow above covers the Time Administration process from the point of view of agencies using timesheets.
Lesson 1: Time Administration Overview

Time entered by an employee via ESS will be approved by a manager in the MSS Portal. Once approved, time is picked up by the nightly run of Time Evaluation, shown above in red.

Time provided by Interface will be picked up by Time Evaluation shown above.

How is Time Entered and Approved in the Integrated HR/Payroll System?

<table>
<thead>
<tr>
<th>Time Entry Method</th>
<th>Approval Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ESS Time Entry</td>
<td>Manager via MSS *</td>
</tr>
<tr>
<td>2. Time Administrator</td>
<td>Supervisors sign the timesheets before submitting to Time Administrators for entry into the Integrated HR/Payroll System.</td>
</tr>
<tr>
<td>3. Interfaced Time Data</td>
<td>Reviewed and approved in the Agency’s system before transfer</td>
</tr>
</tbody>
</table>

ESS Time can also be approved in the Integrated HR/Payroll System by a Time Approver. This responsibility is assigned to select Payroll Administrators and HR Master Data Maintainers. It is a backup role and intended to be performed on an exception basis.

Time Administrators must not enter their own time in CAT2 due to the approval process.

Terms and Concepts

- **Personnel Subarea** – The subarea defines the employee’s relationship to the State and plays an important role in their time in the Integrated HR/Payroll System. Will determine which days are eligible for holiday premium pay.

- **Calendar** – Assigned calendar in the Integrated HR/Payroll System.

- **Work Schedule** – Assigned combination of daily work schedules. Indicates when employee is expected to work. Maintained by HR Master Data Maintainer.

- **Work Week** – Regular repeating sequence of days that can differ from a calendar week. The work week can start and end on any weekday at any time.

- **Time Management Settings** – Hold key time data for position in the Integrated HR/Payroll System

- **Premium Pay** – Shift premiums, holiday premium, and weekend premiums that can be payable based on an employee’s work schedule and/or hours recorded
Each of the items above is a key component used by the Integrated HR/Payroll System to derive premium pay.

Current List of Work Schedules

You can find the most current list of work schedules outside of the Integrated HR/Payroll System on the OSC Training website:

<table>
<thead>
<tr>
<th>Additional Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer to the OSC Training website in HELP documents for more information about Work Schedules</td>
</tr>
<tr>
<td>Search for the following support document titles:</td>
</tr>
<tr>
<td>• Work Schedule job aid</td>
</tr>
</tbody>
</table>

- New work schedule requests should be directed to the BEST Shared Services team.
- Questions about existing Work Schedules should be directed to your agency HR Master Data Maintainer.

FILE NOTE: Not all work schedules are valid for all Personnel Subareas or Employee Groups/Subgroups.

View Target Hours/Work Schedules in the Integrated HR/Payroll System

**View Daily Target Hours – CAT3**

- You can view daily target hours using transaction Enter Time – CAT3

FILE NOTE: CAT3 does not show the work schedule rule or shift description.

**Display Work Schedule/Shift Description – PA61**

- You can view an employee’s work schedule rule, shift description, and any active substitutions using transaction PA61.

FILE NOTE: HR Master Data Maintainers are responsible for updating an employee’s work schedule.
EXERCISE 1.1: Logging into the Integrated HR/Payroll System

SCENARIO
You need to log on the Integrated HR/Payroll System training client so you can complete course exercises.

Instructions
Use the steps and data provided in the notes below to log on to the Integrated HR/Payroll System in the classroom.

1. Access the Integrated HR/Payroll System portal web page.
2. Enter the User ID and password that is assigned to your classroom PC.
3. Click the Log on button.
4. Click Yes to confirm the security message displayed.
5. Click the SAP GUI tab.
6. Click the training client specified by your Instructor.
7. Stop when you have reached the SAP Easy Access screen.

Follow your instructor as he/she leads you in adding the following transactions to your SAP Favorites folder:

- CAT2
- CAT3
- CATS_DA
- PA61
- PT50
- PT66
- PT_ERL00 (these are ending zeros)
- PT_BAL00 (these are ending zeros)
- ZNCTIME

The Working With Your Favorites Folder job aid is available on the OSC Training website in HELP documents for more information.
Time Management Infotypes

There are many infotypes that are relevant for Time processing.

**Employee Settings:**

The following Infotypes hold key time data specific to the employee:

<table>
<thead>
<tr>
<th>Infotypes</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>Organizational Assignment</td>
<td>Holds organizational data such as Employee Group, Employee Subgroup, and Personnel Subarea</td>
</tr>
<tr>
<td>0007</td>
<td>Planned Working Time</td>
<td>Work schedule and working hours</td>
</tr>
<tr>
<td>0315</td>
<td>Time Sheet Defaults</td>
<td>Indicates if a timesheet is required</td>
</tr>
<tr>
<td>0552</td>
<td>Time Specification</td>
<td>Length of Service/Prior Service. Relevant to accruals</td>
</tr>
<tr>
<td>2001</td>
<td>Absences</td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td>Attendances</td>
<td></td>
</tr>
</tbody>
</table>

---

**EXERCISE 1.2: Display Employee Personnel Subarea/ Work Schedule (PA61)**

**SCENARIO**

Part 1 - You wish to view an employee’s Personnel Subarea.

Part 2 - You wish to view an employee’s work schedule and see their holiday schedule.

 **NOTE**: If an employee were on a calendar other than NC01 (Normal Calendar) such as the AC01 (Alternate Calendar), the date of the holiday might display on a different day.
Instructions

1. Enter transaction code **PA61** in the Command field and click or press **Enter**.

2. Complete the following fields for each part of this demonstration:

<table>
<thead>
<tr>
<th>PERNR #: Tomeka Avans FT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  80000430 6  80000435 11  80000440 16  80000445</td>
</tr>
<tr>
<td>2  80000431 7  80000436 12  80000441 17  80000446</td>
</tr>
<tr>
<td>3  80000432 8  80000437 13  80000442 18  80000447</td>
</tr>
<tr>
<td>4  80000433 9  80000438 14  80000443 19  80000448</td>
</tr>
<tr>
<td>5  80000434 10 80000439 15  80000444 20  80000449</td>
</tr>
</tbody>
</table>

Part 1

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel no.</td>
<td>Use <strong>Employee (Tomeka Avans)</strong> from the list above. (Your instructor will assign your Student ID to use)</td>
</tr>
<tr>
<td>Infotype</td>
<td><strong>0001</strong> for Organizational Assignment</td>
</tr>
</tbody>
</table>

3. Click the **Overview** button.

4. Click on the first record to highlight it.

5. Click on the **Change** button. The Change Organizational Assignment infotype is displayed.

   💡 **NOTE:** Use the **Change** button as there is no Display button in the PA61 transaction.

6. Locate the **Subarea** field in the Enterprise structure section of the screen.

   💡 **NOTE:** The Pers.Area displays in both the Personnel Subarea and the Personnel Area.

7. Click the **Back** button until you return to the PA61 transaction screen.
Part 2

8. From within the same transaction PA61, enter the **Infotype** as indicated below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infotype</td>
<td>07 for Planned Working Times</td>
</tr>
</tbody>
</table>

9. Click the **Overview** button.

10. Click on the current record to highlight it.

11. Click on the **Change** button. The Change Planned Working Time infotype is displayed.

12. Review the displayed fields:
   - Work schedule rule
   - Time Mgmt status
   - Working week

13. Click on the **Work Schedule** button to access the Display Work Schedule screen.

14. Click the **Next month** button as needed until you reach a month with a holiday.

15. Make note of the **Daily Work Schedule** fields showing FREE for days off and 1N08 for a night shift of eight hours for this employee.

16. View the holiday in the month and locate the **four** in the **Public holiday class (HC)** field. This indicates that this day is a public holiday for this employee based on their assigned holiday calendar (NC).

   └ *NOTE:* If this employee were on another calendar such as the Alternate Calendar, the holiday might display on a different date.

17. Click the **Back** button until you return to the SAP Easy Access screen.

This exercise is complete.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *
EXERCISE 1.3: Display Daily Target Hours (CAT3)

SCENARIO
You wish to view Sarah Beckham’s work schedule as it is displayed in the Time Sheet (CAT3) transaction. Sarah is a Part-time/Positive Pay/Permanent employee.

Instructions

1. Enter transaction code **CAT3** in the Command field and click or press **Enter**.

2. Complete the following field and click or press **Enter**:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data entry profile</td>
<td>NORML-SU</td>
</tr>
</tbody>
</table>

   - The current date defaults in the **Key date** field which is fine for this exercise. However, remember to update to reflect the date indicated on the timesheets.

3. Click the **Personnel Selectn** button to access the Personnel Number Selection for Fast Data Entry screen.

4. Complete the following field:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel number</td>
<td>Use Employee (Sarah Beckham) from the list above.</td>
</tr>
</tbody>
</table>
5. Click the **Execute** button.

6. Highlight the **Personnel number** on the Time Sheet: Initial Screen.

7. Click the **Display Times** button to access the Time Sheet: Data Entry View screen.

8. Review the displayed screen. Make note of the **Target Hours** row displaying the daily work schedule.

9. Click the **Back** button until you return to the SAP EASY Access screen.

This exercise is complete.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

**Time Management Settings**

**Premium Pay Eligibility**

- **Overtime Compensation Eligibility and Rate (Infotype 9005)** - If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid 9005 record.

- **Night Shift Premium (Infotype 9007)** - Positions eligible for this premium must have a valid 9007 record. OSHR approved rates other than the default of 10% must be entered in the rate field.

- **Evening Shift Premium Eligibility and Rate (Infotype 9008)** - Positions eligible for this premium must have a valid 9008 record. OSHR approved rates other than the default of 10% must be entered in the rate field.

- **Weekend Shift Premium Eligibility and Rate (Infotype 9009)** - Positions eligible for this premium must have a valid 9009 record. OSHR approved rates other than the default of 10% must be entered in the rate field.

- **Holiday Premium Rate and Payout (Infotype 9010)** - OSHR approved rates other than the default of 50% must be entered in the rate field. A 9010 record is required only if the Holiday Premium Rate is different than 50%.

- **On-Call Eligibility and Rate (Infotype 9011)** - Positions eligible for On-Call compensation must have a valid 9011 record. The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSHR approved on-call rate.
Lesson 1: Time Administration Overview

**NOTE:** These position settings stored on Infotypes 9005-9017 control premium pay eligibility.

**NOTE:** The OM Master Data Maintainer is authorized to adjust Position settings using transactions PO13.

**NOTE:** These position settings can be viewed using transactions PO13D which is for display only.

### Premium Pay Eligibility Flags

Premium Pay eligibility flags are indicated on the position rather than the employee.

A check indicates that there is eligibility information for the specified infotype.

- **Callback Eligibility (Infotype 9012)** - Positions eligible for Callback compensation must have a valid 9012 record. The decision to pay vs. comp time is determined by the Immediate Payout checkbox.

- **Gap Hours (Infotype 9017)** - Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the Gap Hours Accrual checkbox.

  Gap Hours are additional hours for Subject- FLSA employees. The "Additional hours" are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

  **NOTE:** Non-subject temporary employees are eligible to be compensated for Gap Hours. Temporary employees are paid for all hours recorded per time worked.

The OM Master Data Maintainer is authorized to adjust Position settings using transactions PO13.

Position settings are based on Positions and Agencies must maintain consistency between similar Positions.

**NOTE:** B0083 Position/Time Eligibility Report is available in Business Objects (BOBJ). This report displays settings about a position with location and pay information.
**Premium Pay Infotypes**

**Overtime Eligibility**

<table>
<thead>
<tr>
<th>Position</th>
<th>RESEARCH AN RESEARCH ANALYST 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Status</td>
<td>Active</td>
</tr>
<tr>
<td>Validity</td>
<td>10/17/2007 to 12/31/9999</td>
</tr>
</tbody>
</table>

- **Overtime Compensation**: 01S 59901032 1
- **Immediate Payout**: OR Comp Agrading Limit 365 Days

**Night Shift Eligibility**

<table>
<thead>
<tr>
<th>Position</th>
<th>RESEARCH AN RESEARCH ANALYST 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Status</td>
<td>Active</td>
</tr>
<tr>
<td>Validity</td>
<td>10/17/2007 to 12/31/9999</td>
</tr>
</tbody>
</table>

- **Night Shift Premium**: 01S 59901032 1
- **Night Shift Prem Elig**: ✓
- **Night Shift Prem Rate**: 10 %

These are examples of the infotypes that store the Premium Pay eligibility. Eligibility can be restricted to a specific period of time by adjusting the validity date.

Time Administrators can see an employee’s time management settings on the employee’s Time Statement (ZNCTIME).
**Premium Pay**

Premium pay is calculated in the Integrated HR/Payroll System based on the employee’s designated work schedule and their Position eligibility.

Position must be eligible and either:

The employee is assigned to a shift and recorded work hours

**OR**

The employee works some other shift and is properly substituted

**OR**

The employee records work time and uses an appropriate premium pay code

The amount of premium pay is derived from the Position settings.

- 9005 – OT Eligibility and Pay Provisions
- 9007 – Night Shift Eligibility and Rate
- 9008 – Evening Shift Eligibility and Rate
- 9009 – Weekend Shift Eligibility and Rate
- 9010 – Holiday Premium Rate
- 9011 – On Call Eligibility, Rate and Pay Provisions
- 9012 – Callback Eligibility
- 9017 – Gap Hours compensation

**Eligibility:** Usually just a check box – if checked, the employee is eligible.

**Pay provisions:** Pay it, comp it, or pay it after a specific period of time. For example, an employee is eligible for OT, but it will be banked as Comp Time. If the Comp Leave has not been taken after 60 days, it will be paid then.

**Rates:** Some specialized Positions carry rates other than the standard 10%. An agency can designate the amount of the premium applicable for a Position.

For further information on premium pay, please consult the OSHR Personnel Manual available online at:

[http://oshr.nc.gov/policy-forms](http://oshr.nc.gov/policy-forms)
Premium Pay Codes

- 01 – Night Premium
- 02 – Evening Premium
- 06 – Stop Premium

The Integrated HR/Payroll System knows the days of the week.

**Premium Pay Codes (also known as Push Codes)** - Push Codes are used on the timesheet screen to indicate which hours should receive the Night (01) or the Evening (02) Shift Premium. There is also a premium pay code (or push code) value that indicates time evaluation should Stop Premium (06) for those employees whose indication of premium payment is triggered behind the scenes by their assignment to a shift premium designated work schedule.

The use of specific premium pay codes is meant as an exception to the employee's regular schedule. While the system allows for premium pay codes, the use of these codes can invite abuse, or affect fairness among employees. Wherever possible, employees should be substituted to the appropriate shift.

Premiums that are explicitly premium pay coded and derived from the shift assignment will not double up.

Example:
- An employee who records **02 (Evening Premium)** on a Saturday would receive Evening and Weekend premium if the Position was eligible and it was a scheduled work day. If Saturday is a non-scheduled work day, a substitution must be created in order that employee to receive evening premium pay for the hours recorded.

The default weekend behavior is from the night shift Friday night through the end of the Sunday night shift (early Monday morning).

The **06 (Stop Premium)** code is meant to be used for the rare circumstance when an employee who is normally on a night shift is required to attend training during the day. The 06 stops Evening Shift as well but would not stop Weekend Shift Premium.

Example:
- If someone worked eight hours of a normal day schedule and one hour in the evening, they would use the Evening Premium code (or push code) on a second line for that one additional hour to mark it as being worked in the evening. If the person is on an evening schedule, their position work schedule is already marked as evening premium eligible. If they come in an hour early in the day schedule time frame they would enter a second line with that hour and mark it with a Stop (06) Premium code if that ninth hour is not eligible for a premium. This can vary by agency.
The premium pay code is provided as a last resort solution to avoid overpayment to the employee.

A substitution is the correct way to reflect the change in the employee’s expected work hours and will be discussed in lesson 4.

**Remember there may be risks** – Using push codes instead of proper shift assignment or substitution creates a risk of inequity among employees of the same class on the same shift. The best practice is to use substitutions or a work schedule change via the HR Master Data Maintainer rather than push codes.

**Positive vs. Negative Time**

**Valid Time Management Settings**

All employees impacted by the Integrated HR/Payroll System can be categorized into one of three time-entry groupings.

- **Positive Time/Actual Pay**: Employees must record all hours, including hours worked and leave taken. **Failure to record time will result in the employees not being paid.**
  - Applies to Temporary Employees and DOT.

- **Positive Time/Exception Pay**: Employees must enter all time worked, as well as any absences or leave taken. **If time is not recorded, employees receive their monthly base pay unless the Leave Without Pay (9400) code is recorded.**

- **Negative Time**: Employees must record only variations from his or her normal schedule, such as leave taken. Holiday Leave (9300) is not considered an exception if taken on the holiday. **Only employees “not-subject to FLSA” can be negative time.**
Positive Time Reporting

Positive Time/Actual Pay:

This method of time reporting applies to all temporary employee, regardless for which agency the employee works.

Positive time/actual pay reporting employees must enter time to receive payment.

Positive Time/Exception Pay:

Positive time/exception pay reporting employees will receive their monthly base if no time records are recorded.

If Leave Without Pay (9400) is recorded, the employees base pay will be reduced.

-article

NOTE: All employees who are subject to FLSA fall into one of the Positive Time categories.

The Time Worked (9500) code should be used to enter regular work hours for Positive Time employees. Whether an employee works 40 hours or 50 hours, all the work hours should be recorded as 9500.

Positive Time/Exception Pay employees will continue to receive their regular monthly pay unless exceptions are entered in the system. An exception could be entering the Leave Without Pay (9400) code. In this case the employee's pay would be reduced by the number of hours indicated if the employee is below the scheduled work hours. Another exception can be for an employee who is entitled to overtime pay and enters more than 40 hours of Time Worked (9500) into the system. This particular employee would be entitled to overtime pay, and his or her pay would reflect that.

NOTE: If an employee is entitled to overtime pay or comp time, the system will automatically calculate this based on the hours recorded each week.

Negative Time

If you have NOT been instructed by your manager or human resources department to enter all your time, but instead to record exceptions to your work schedule, you are designated as a “Negative Time” employee. In a week when a Negative Time employee makes no entry at all, the system assumes that the employee worked the required number of hours.

A Negative Time employee must record only variations from their normal schedule, such as leave taken.

Holiday Leave (9300) is not considered an exception.

It could be appropriate for a Negative Time employee to record time worked on a holiday or to record the extra few hours the employee can have worked in any given week.
Time Worked is recognized as an exception in addition to the hours the employee was scheduled to work. If eligible, the employee will accrue comp time for Time Worked (9500) code when recorded by a Negative Time employee after any absences have been offset.

It is important to note that the Integrated HR/Payroll System deducts approved leave according to a standard approved leave hierarchy which will be discuss in lesson 2. All items in the leave hierarchy fall under the Approved Leave (9000) category. For example, if an employee records an Approved Leave (9000) code, the system will automatically deduct the amount of time taken from the employee’s leave quota using the established hierarchy.

Sick leave is also subject to a hierarchy (sick leave, received shared leave, and advanced sick leave).

Employees are encouraged to review the Time Entry Guide Job Aid to gain a better understanding of how time works in the Integrated HR/Payroll System. The job aid is available on the OSC Training website in Help Documents.

**Weekly Time Entry**

All agencies are encouraged to enter time weekly - even those with a monthly overtime period.

Benefits of weekly time entry:

- Employees will receive premium pay sooner. Once entered and approved, premium pay will pay in the next available payroll. Must also go through the nightly time evaluation process.
- Accurate and timely leave accrual
- Up-to-date Time Statements and Quota Overviews
- Reduced administrative burden at the end of the period

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

**EXERCISE 1.4: Display Time Management Settings on the Time Statement (ZNCTIME)**

**SCENARIO**

You can view an employee’s time management settings to see their Time Management Status, Work Schedule Rule, and/or Employee Group/Subgroup.

**Instructions**

*Time Administrators can review the information and request changes through the HR Master Data Maintainer.*
1. Enter transaction code ZNCTIME in the Command field and click the Enter button or press Enter.

2. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period (YYYYMM)</td>
<td>201705</td>
</tr>
<tr>
<td>Personnel no.</td>
<td>Use Employee (Tomeka Avans) from the list above.</td>
</tr>
</tbody>
</table>

3. Click the Execute button to access the Print Time Statement Form dialog box.

4. Review the displayed print options.

5. Click the Print preview button to review the Print Preview of LOCL Page.

6. Review the displayed time form paying special attention to the work schedule and employee settings.
   - Overtime period
   - Time Management settings
   - Employee Group (SPA vs. EPA)

7. Click the Back button until you return to the SAP Easy Access screen.

This exercise is complete.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *
**Knowledge Check**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. True or False – It is necessary to enter a premium pay code for all night, evening, and weekend shifts.</td>
<td></td>
</tr>
<tr>
<td>2. Which of the following is correct?</td>
<td></td>
</tr>
<tr>
<td>A. Negative time employees record every hour worked</td>
<td></td>
</tr>
<tr>
<td>B. Positive time/actual pay employees record exceptions only</td>
<td></td>
</tr>
<tr>
<td>C. Positive time/exception pay employees record exceptions only</td>
<td></td>
</tr>
<tr>
<td>D. None of the above</td>
<td></td>
</tr>
<tr>
<td>3. True or False – Weekly time entry is mandatory in the Integrated HR/Payroll System.</td>
<td></td>
</tr>
<tr>
<td>4. True or False – The Time Administrator adjusts Work Schedules in the Integrated HR/Payroll System.</td>
<td></td>
</tr>
<tr>
<td>5. Is Negative Time a valid Time Management Setting?</td>
<td></td>
</tr>
<tr>
<td>6. Time entered by employee in ESS is approved by the supervisor in ____</td>
<td></td>
</tr>
<tr>
<td>7. Is Day Premium a valid premium pay code?</td>
<td></td>
</tr>
</tbody>
</table>

**Summary**

In this lesson, you learned to:

- Describe Time Administration process
- Describe Time Roles and Responsibilities
  - Time Administrators vs. ESS
- Define new time recording terms and concepts
- Review work schedules
- Describe premium pay eligibility
LESSON 2: QUOTAS AND SYSTEM BEHAVIORS

Objectives

- Describe Quotas in the Integrated HR/Payroll System
- Describe key system behaviors
  - Holiday Behavior
  - The Leave Hierarchy
  - Leave Offsetting
  - Recovery of Liabilities

Quotas

The Integrated HR/Payroll System automatically manages an employee's accruals of various quotas, including:

- Sick
- Vacation
- Community Service
- Military Leave (if applicable)
- Holiday

Employees using ESS can review quotas online.

Employees without ESS can request a time statement with quota balances from their Time Administrator.

Quota balances reflect the balance as of the last time Time Evaluation was executed. Employees recording time monthly, instead of weekly, will have balances that are not entirely current.

The Integrated HR/Payroll System will also systematically manage deductions to these quotas. There are few special circumstances that require manual adjustments by a Leave Administrator to an employee's quota balances.

The following scenarios require manual quota adjustments via Infotype 2013:

- An employee electing to use his or her Community Service Leave for tutoring
- An employee hired into state service mid-year that is a member of the military reserve
- An employee requesting and being approved for Advanced Leave
• An employee requesting and being approved to receive Voluntary Shared Leave (VSL) donations
• Returning unused Received Shared Leave to the donor
• An employee with a valid discrepancy in his or her quota
• Separation action zeroing out remaining balance of Vacation Quota
• Employees on LOA

Quota corrections are created by Leave Administrators.

Quota Types

<table>
<thead>
<tr>
<th>Quota Type</th>
<th>Quota Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Vacation Leave</td>
</tr>
<tr>
<td>15</td>
<td>Sick Leave</td>
</tr>
<tr>
<td>20</td>
<td>Overtime Comp Time</td>
</tr>
<tr>
<td>21</td>
<td>Gap Hrs Time</td>
</tr>
<tr>
<td>22</td>
<td>Holiday Comp Time</td>
</tr>
<tr>
<td>23</td>
<td>Callback Comp Time</td>
</tr>
<tr>
<td>24</td>
<td>Travel Compensatory Time</td>
</tr>
<tr>
<td>26</td>
<td>On-Call Comp Time</td>
</tr>
<tr>
<td>27</td>
<td>Emergency Closing Comp Time</td>
</tr>
<tr>
<td>29</td>
<td>Incentive Leave</td>
</tr>
<tr>
<td>31</td>
<td>Advanced Vacation Leave Allowed</td>
</tr>
<tr>
<td>32</td>
<td>Advanced Sick Leave Allowed</td>
</tr>
<tr>
<td>40</td>
<td>Holiday Leave</td>
</tr>
<tr>
<td>50</td>
<td>Bonus Leave</td>
</tr>
<tr>
<td>56</td>
<td>Special Bonus FY2018</td>
</tr>
<tr>
<td>57</td>
<td>Special Bonus FY19</td>
</tr>
<tr>
<td>61</td>
<td>Adv Weather # Hours Owed</td>
</tr>
<tr>
<td>65</td>
<td>Community Service Leave</td>
</tr>
</tbody>
</table>
• **Holiday Leave** is the holiday that is due in the next 60 days, for positive time employees. A holiday absence will reduce the amount in the Holiday Leave Quota. Negative Time employees will not see a Holiday Quota.

• **Holiday Comp** is earned when an employee works on a holiday or if the employee does not record and approve the holiday leave within 30 days of the holiday. At that time, the system automatically moves the Holiday Leave to Holiday Comp Leave.

*Leave Hierarchy – Approved Leave – A/A Type 9000*

All absences recorded as **9000 - Approved Leave** will be subject to this **Leave Hierarchy**. The Leave Hierarchy reflects the order in which leave balances will be deducted when an entry for an Approved Absence is approved and transferred at night. At the point of entry, the quotas are checked in succession until enough quota is found to cover the recorded absence. The system will return a message 'no quota available' only if it has checked each bucket and not found a balance to cover the absence.
The quotas will be automatically deducted in this order.

1. Holiday Comp
2. OT Comp
3. Gap Hours
4. Callback Comp
5. On-Call Comp
6. Travel Comp
7. Emergency Closing Comp
8. Incentive Leave
9. Vacation
10. Advanced Leave

### Additional Resources

For more information about OSHR Leave policies, please refer to the OSHR website:

[http://oshr.nc.gov/policy-forms](http://oshr.nc.gov/policy-forms)

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**Hierarchy – Sick Leave – A/A Type 9200**

The **Sick Leave** Hierarchy represents the order in which the system will deduct quotas when an entry of 9200 is recorded. Like the Approved Leave Hierarchy, the quotas are checked at the point of entry, and the quotas are deducted when time is approved and transferred.
Accruals

**Quota Accruals**

**Who accrues?**
- Employees with an employer/employee non-temporary relationship with the State.

**When do Employees Accrue?**
- Positive time employees must record time worked or leave for 50% of their scheduled work days in the pay period to accrue in that period. The accrual date depends on the number of work days, as derived from the employee’s work schedule.

**What counts for accrual?**
- Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.

**What do they accrue?**
- Hours and minutes, in decimals

**What is prorated?**
- Annual Leave, Sick Leave, and Holiday Leave are prorated for part-time employees. Community Service leave is prorated for new hires starting after mid-January.

The accrual date depends on the number of work days as derived from the employee’s work schedule.

- For example:
  - An employee works five days a week.
  - There are 21 work days for this employee, on this work schedule, in the current month.
  - The employee would accrue his leave when time is entered and approved through the 11th workday of the month.

Employees with intermittent LWOP could conceivably accrue later in the month.

Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.

🔍 **NOTE:** Only time entries that place the employee in a pay status are counted toward achievement of 50%. Any entry for Leave without pay (LWOP – A/A type 9400) will delay the accrual of leave until the employee meets 50% of the period in a pay status.
Accruals – When and How

THE RULE:

An employee will accrue their leave when they have achieved 50% of their payroll period.

Employees who are Positive Time must demonstrate that achievement by recording time. The time must be approved and processed during time evaluation.

Employees who record only their exceptions (Negative Time) will receive their accruals based on their planned Working Time.

FILE NOTE: Integrated HR/Payroll System staff recommend weekly time entry to ensure timely and accurate accruals. Agencies adopting monthly entry deadlines for their Positive Time Recording population will see a delay in the monthly accruals.

Quota Overview

PT50 provides the most up-to-date quota balances.

The Quota Overview (PT50) transaction has several key tabs:

- Selection dates – not used
- Absence quotas – tab shows quota types and their balances (shown above)
- Accrual information – tabs shows accrual information
- Attendance quota tab – not in use
On the Absence quotas tab there are several columns showing key values:

- **Entitlement** – what is added to the quota balance through accruals, offsets, or adjustments during the display period
- **Remaining** – hours left for use by employee
- **Requested** – hours deducted

On the Accrual Information tab:

- **Generated** – calculated by the system and ready to be moved into employee’s quotas during next Time Evaluation
- **Transferred** – moved into employee’s quota and available for use

EXERCISE 2.1: Quota Overview (PT50)

<table>
<thead>
<tr>
<th>SCENARIO</th>
</tr>
</thead>
<tbody>
<tr>
<td>You will view Marva Mattox’s leave quotas. Marva is a Full-time/Negative Pay/Permanent employee. Access the Absence Quota tab to review Marva’s quota balances.</td>
</tr>
</tbody>
</table>

**Instructions**

1. Enter transaction code **PT50** in the Command field and click or press Enter.

2. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel no.</td>
<td>80000407 (Marva Mattox)</td>
</tr>
</tbody>
</table>

3. Click the Update display data button towards the top left of the screen to update the Quota Overview screen with the data of the employee entered.

4. Review the displayed quota overview tabs.
5. Access the following tabs/functions:
   - All
   - Current Period
   - Expand

6. Select a column and move it to precede another column.

7. Move it back.
   
   ![NOTE: The Attendance quotas tab is not in use.]

8. Click the Back button until you return to the SAP Easy Access screen.

This exercise is complete.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

**Holiday Leave – (Type 9300)**

Positive Employee will see 8 hours added to their Holiday Leave quota 30 days prior to July 4th.

If not taken, Employee will see that the Holiday Leave balance will no longer reflect the 8 hours of leave as of the 30th day after the Holiday, August 3rd.

-----TAKE A DAY OFF SOMEWHERE IN HERE AND CHARGE 9300-----
**Holiday Leave Availability**

- Holiday Leave is available in the system 30 days before the holiday and will remain available for use until 30 days after the holiday.
- If the employee took the time off, but failed to reflect it on the timesheet, that must be corrected. If the employee did not have the benefit of their Holiday, the system automatically transfers the expired Holiday Leave to the Holiday Comp leave quota.

**Positive Time Employees**

- Will see holiday leave is displayed in their quotas 30 days before the holiday
- Can take the holiday from that date forward, not to exceed 30 days after the holiday
- Can observe the holiday on the day it naturally occurs. This 60-day holiday period is designed to provide flexibility for agencies with 24x7 operations.

**For Employees who do not record Holiday time within the 60-day period and who did not work on the holiday**

- The holiday quota will be usable outside of the 60-day window.
- If the employee did not have the benefit of the holiday, the former Holiday Leave will be converted to Holiday Comp.
  - If the employee DID have the benefit of the holiday, the previous time entries must be corrected.

**Holiday Behavior – Positive Time Employees**

**Scenarios**

- If the holiday falls on a regularly scheduled work day and the employee is off, the employee should record 9300, Holiday Leave.
- If the employee works on the Holiday, the employee will record work hours, will receive equal time off, up to eight hours, and the relevant holiday premium pay. The Holiday Leave (9300) is automatically converted to Holiday Comp Time and placed in the appropriate Leave quota.
- If the holiday falls on a non-scheduled work day, the employee can record their holiday leave (9300) on another day, an absence they should arrange with their supervisor.
- Some agencies allow the employees who normally work 4x10 to revert to a 5x8 schedule in the week of a holiday. This will not require a change to the employees work schedule.
**Holiday Behavior Time Types (PT-BAL00 Transaction)**

<table>
<thead>
<tr>
<th>Quota Type</th>
<th>Quota Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>9308</td>
<td>Holiday Liability</td>
</tr>
<tr>
<td></td>
<td>If an EE's holiday leave balance goes negative, IT9308 will generate</td>
</tr>
<tr>
<td>9311</td>
<td>Entitlement available after the holiday</td>
</tr>
<tr>
<td></td>
<td>Tracks balance after the holiday &amp; is updated once any or all the balance has been used</td>
</tr>
<tr>
<td>9316</td>
<td>Entitlement used before the holiday</td>
</tr>
<tr>
<td></td>
<td>Contains what (if anything) has been used before the holiday</td>
</tr>
<tr>
<td>9317</td>
<td>Entitlement remaining on the holiday</td>
</tr>
<tr>
<td></td>
<td>Only populated on the holiday</td>
</tr>
<tr>
<td>HP02</td>
<td>Hours worked on the holiday</td>
</tr>
<tr>
<td></td>
<td>Contains the total hours worked</td>
</tr>
<tr>
<td>9122</td>
<td>Holiday comp accrual</td>
</tr>
<tr>
<td></td>
<td>Value of holiday comp</td>
</tr>
<tr>
<td>9140</td>
<td>Holiday leave accrual</td>
</tr>
<tr>
<td></td>
<td>Value of holiday comp</td>
</tr>
<tr>
<td>T40R</td>
<td>Holiday leave remaining balance</td>
</tr>
<tr>
<td></td>
<td>Remaining balance on a given day</td>
</tr>
<tr>
<td>T40U</td>
<td>Holiday leave used</td>
</tr>
<tr>
<td></td>
<td>Used value on a given day.</td>
</tr>
</tbody>
</table>

**Holidays and LOAs**

When an employee is on a LOA all holiday processing will be suspended.

Employees who are using quotas (leave, vacation, sick) can be entitled to a holiday. The Leave Admin will be responsible for creating a quota correction record (2013) to give the employee these hours.

When the positive employee returns from a LOA, all holidays in the next 30 days will be restored.
Holiday Behavior – Negative Time Employees

The only exception for negative time employees is if they WORK on the holiday. Otherwise, it will be assumed that they had the benefit of the holiday.

**Work Schedule Rule Alert:** All non-subject negative time employees must be assigned the 5x8 work schedule rule.

Leave Offsetting

**THE RULE:**

*Leave is to cover the time between hours worked and the minimum expected work hours.*

When Approved Leave is taken in the same period where the employee has worked additional hours, the amount of leave taken will be offset with the additional work hours, and the leave that had been recorded will be restored to the employee’s quota for later use.

**Example:** A Positive Time employee with a normal 5x8-hour work schedule works four ten-hour days and takes eight hours of leave on Monday. In this scenario, the eight hours of leave will be restored to the employee’s Approved Leave quota and the employee will be paid for 40 hours.

Additional Resources

For more information about the OSHR Leave Offsetting policy, please refer to the OSHR website:

http://oshr.nc.gov/policy-forms
Quotas with established limits will be offset except for Holiday, Civil and Other Management Approved leave.

Entries made for Leave in excess of the minimum required work hours will automatically be restored to the employee’s leave quota balances.

Leave restoration will be *first- taken, first-restored*. If a weekly employee takes Approved Leave on Monday, and then a day of Sick Leave on Tuesday and then works an extra eight hours on Wednesday, the Approved Leave from Monday will be the first to be restored.

**NOTE:** *Leave Offsetting is done within an Overtime (OT) period. For normal, 40-hour, subject personnel, Leave Offsetting will be done within the seven-day OT period. For 28-day employees, the entire 28-day period is subject to offsetting.*

---

### 40 HOURS – MINIMUM REQUIRED WORK HOURS

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 HOURS</td>
<td>10 HOURS</td>
<td>10 HOURS</td>
<td>10 HOURS</td>
<td>10 HOURS</td>
</tr>
<tr>
<td>APPROVED LEAVE</td>
<td>WORKED</td>
<td>WORKED</td>
<td>WORKED</td>
<td></td>
</tr>
</tbody>
</table>

**Approved Leave, Sick Leave and Community Service Leave will be offset when the employee achieves his expected work hours in the same OT period in which leave was recorded.**
View Leave Offsetting

<table>
<thead>
<tr>
<th>Description</th>
<th>Beg. Balance</th>
<th>Accrued</th>
<th>Used</th>
<th>Paid</th>
<th>Expired</th>
<th>Offset</th>
<th>End Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation Leave</td>
<td>20.00</td>
<td>15.17</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>35.17</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>42.00</td>
<td>8.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>16.00</td>
<td>50.00</td>
</tr>
<tr>
<td>Overtime Comp Time</td>
<td>0.00</td>
<td>8.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>8.00</td>
</tr>
<tr>
<td>Holiday Comp Time</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>8.00</td>
</tr>
<tr>
<td>Holiday Leave</td>
<td>16.00</td>
<td>0.00</td>
<td>16.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Community Service</td>
<td>0.00</td>
<td>24.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>24.00</td>
</tr>
</tbody>
</table>

Leave Offsetting is highlighted in the Absence Entitlements section of the Time Statement. Offsets are shown in the Offset column.

The CATS time entries will not be changed – only the results will reflect the offset.

Leave taken will show as ‘used’ on the Time Statement.

When the employee records additional work hours, the leave taken will be ‘offset’ by the additional hours.

The leave quota will show a beginning balance, accrued, used, offset, and an ending balance.

Recovery of Liabilities

**Adverse Weather**

If an employee has an outstanding Adverse Weather liability and works additional hours, the additional hours are used to pay back the liability until it is satisfied.

- Absence due to adverse weather is entered using the Adverse Weather A/A type – 9545.
- During Time Evaluation, this A/A type will cause the creation of an adverse weather liability.
- During subsequent Time Evaluation, the system will check for the Adverse Weather Make-up A/A type – 9512 or additional hours worked.
- The adverse weather liability will be reduced accordingly when either is present.
**Advanced Leave**

As leave is accrued, it is used to satisfy an outstanding Advance Leave liability of the same type (e.g., vacation accruals are used to pay back vacation advances).

If an employee has an outstanding Advanced Leave liability and works additional hours, the additional hours are used to pay back the liability until it is satisfied.

- OSHR policy allows advanced leave to be granted to employees provided it is formally approved by the employee’s Agency. With proper approval, an employee can receive advances of Sick and Vacation leave in amounts not exceeding that which an employee will accrue within the remainder of the calendar year.

- Since an employee cannot maintain negative leave balances in the Integrated HR/Payroll System, a Leave Administrator will create a separate Absence Quota equal to the approved amount of Advanced Leave.

- When the Advanced Leave quota is reduced, the system will create and manage a separate Quota to represent the liability that the employee owes the State by using leave in advance of accruing.

- As leave is accrued, the liability is then reduced accordingly.

- All outstanding leave liabilities will be recovered (by docking or offsetting with another leave type) on December 31st.

<table>
<thead>
<tr>
<th>Additional Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer to the OSC Training website in HELP documents for more information about Advanced Leave.</td>
</tr>
<tr>
<td>Search for the following support document titles:</td>
</tr>
<tr>
<td>• <strong>PA61 Advanced Leave BPP</strong></td>
</tr>
</tbody>
</table>
Knowledge Check

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. True or False – Accruals are calculated and entered by the Leave Administrator once an employee reaches 75% of their work schedule.</td>
<td></td>
</tr>
<tr>
<td>2. True or False – Employees using ESS can review quotas online.</td>
<td></td>
</tr>
<tr>
<td>3. True or False – An employee can choose the order leave is applied.</td>
<td></td>
</tr>
<tr>
<td>4. True or False – Bonus Leave is the first type of leave consumed in the leave hierarchy.</td>
<td></td>
</tr>
<tr>
<td>5. True or False – Both positive and negative time employees must report hours worked on a holiday.</td>
<td></td>
</tr>
<tr>
<td>6. What transaction should you use if you want to see the most up-to-date leave balance information?</td>
<td></td>
</tr>
</tbody>
</table>

Summary

In this lesson, you learned to:

- Describe Quotas in the Integrated HR/Payroll System
- Describe key system behaviors
  - Holiday Behavior
  - The Leave Hierarchy
  - Leave Offsetting
  - Recovery of Liabilities
Lesson 3: Time Recording

Objectives

- Record, review, and correct time in the Integrated HR/Payroll System
- Identify new time codes using Time Administration Quick Reference Guide

Terms and Concepts

- **Cross Application Time Sheet (CATS)** – Acronym in the Integrated HR/Payroll System for the Cross-Application Time Sheet
- **Data Entry Profiles** – Profile used during time entry to control fields available for use during time entry in transaction CAT2. Described in detail on next slide.
- **Attendance/Absence type (A/A type)** – four-digit code used during time entry to indicate the type of work or leave taken
- **Multiple selections** – The Integrated HR/Payroll System data entry technique that allows you to enter additional values. This technique is very useful for Time Administrators who will enter time for more than one employee at a time.

**CAT2 Timesheet**

A timesheet is not a “thing” that gets submitted or approved. In the Integrated HR/Payroll System, there are only time records – two hours on 5/2/08, eight hours on 5/10/08, etc.

Each time record is processed for viewing independently and doesn’t get collected on a timesheet in the system other than for viewing purposes. The view of seven days seen in ESS is just that – a view of seven days on which time records can or cannot have been entered.

For negative time people, there is no need to enter time records in the Integrated HR/Payroll System except for exceptions like leave hours or extra hours beyond the normal schedule. The Integrated HR/Payroll System will pay the employee their base pay for the month even if no time records are entered at all. No approval is required for Payroll to pay this base pay.

If “time worked” is entered for a negative time person, the Integrated HR/Payroll System will assume they are extra hours beyond the normal work schedule and treat them accordingly. These exception records need to be approved.
Data Entry Profiles

List profiles allow for the automatic release and approval of time data on save.

All profiles, other than ESS profiles, will allow for the automatic release and approval of entries made by a Time Administrator. All ESS profiles will not save time data as released and approved.

If the Time Admin needs to make changes to an approved timesheet, the Time Admin must use a profile that allows changes. All profiles (except the ESS profile) allow Time Administrators to make changes to approved records.

 hủy  NOTE: The assigned profile will default on the initial CAT2 screen. If a Time Administrator enters his or her own time through ESS, the Time Admin will need to change this default setting every time to an appropriate Time Administrator profile (non-ESS) to ensure the keyed entries are released and approved as expected.
### Attendance/Absence Codes

<table>
<thead>
<tr>
<th>A/A Type</th>
<th>Description</th>
<th>A/A Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9000</td>
<td>Approved Leave</td>
<td>9550</td>
<td>Civil Leave – Jury Duty</td>
</tr>
<tr>
<td>9100</td>
<td>Bonus Leave</td>
<td>9560</td>
<td>Community Service Leave</td>
</tr>
<tr>
<td>9200</td>
<td>Sick Leave</td>
<td>9565</td>
<td>Community Service Tutoring</td>
</tr>
<tr>
<td>9300</td>
<td>Holiday Leave</td>
<td>9566</td>
<td>Literacy Volunteer Leave</td>
</tr>
<tr>
<td>9400</td>
<td>Leave Without Pay</td>
<td>9570</td>
<td>Educational Leave</td>
</tr>
<tr>
<td>9500</td>
<td>Time Worked</td>
<td>9620</td>
<td>Military Training Leave</td>
</tr>
<tr>
<td>9511</td>
<td>Remote Callback</td>
<td>9630</td>
<td>Military Active Duty</td>
</tr>
<tr>
<td>9512</td>
<td>Adverse Weather Make-Up</td>
<td>9680</td>
<td>Injury Absence WC</td>
</tr>
<tr>
<td>9513</td>
<td>Communicable Disease Make-Up</td>
<td>9685</td>
<td>Injury Leave</td>
</tr>
<tr>
<td>9514</td>
<td>Work During Emergency Closing</td>
<td>9690</td>
<td>Investigatory Leave</td>
</tr>
<tr>
<td>9515</td>
<td>Travel Time 1X</td>
<td>9710</td>
<td>Flexible Furlough leave</td>
</tr>
<tr>
<td>9516</td>
<td>Callback</td>
<td>9711</td>
<td>FY2012–2013 Special Leave</td>
</tr>
<tr>
<td>9517</td>
<td>On-Call</td>
<td>9712</td>
<td>Special Leave</td>
</tr>
<tr>
<td>9540</td>
<td>Other Mgmt. Approved Leave</td>
<td>9718</td>
<td>Special Bonus FY2018</td>
</tr>
<tr>
<td>9545</td>
<td>Adverse Weather Leave</td>
<td>9719</td>
<td>Special Bonus FY19</td>
</tr>
<tr>
<td>9547</td>
<td>Communicable Disease</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your instructor will lead you in a discussion of the Time Administration Quick Reference Guide.

The Integrated HR/Payroll System time entry requires the use of time codes called Attendance/Absence types:

Classify time/leave for employees:

- On the Integrated HR/Payroll timesheet
- Available from drop-down list in ESS
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• Available from drop-down list in Record Time transaction (CAT2) in the Integrated HR/Payroll System.

CAUTION

A/A type 9400 results in docking. Use with caution!

Time Entry

Time Entry Icons

The chart below covers the icons and buttons on the Time Sheet: Data Entry View screen.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Enter Times (F5) - Used to access time entry screen from Time Sheet: Initial Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon" alt="Personnel Selection" /></td>
<td>Personnel Selection - Used to access the Personnel Selection search from the Timesheet: Initial Screen</td>
</tr>
<tr>
<td><img src="icon" alt="Select All Persons" /></td>
<td>Select All Persons (Shift+F7) - Used to select all persons on the Time Sheet: Initial Screen</td>
</tr>
<tr>
<td><img src="icon" alt="Deselect All Persons" /></td>
<td>Deselect All Persons (Shift+F8) - Used to deselect all persons</td>
</tr>
<tr>
<td><img src="icon" alt="Sort Ascending" /></td>
<td>Sort Ascending (Control+Shift+F8) - Used to Sort Ascending</td>
</tr>
<tr>
<td><img src="icon" alt="Sort Descending" /></td>
<td>Sort Descending (Control+Shift+F9) - Used to Sort Descending</td>
</tr>
<tr>
<td><img src="icon" alt="Settings" /></td>
<td>Settings (F7) – Used to view time sheet settings on the Time Sheet: Initial Screen</td>
</tr>
<tr>
<td><img src="icon" alt="Execute/Copy" /></td>
<td>Execute/Copy (F8) – Used to apply personnel selection from the Personnel Selection screen</td>
</tr>
<tr>
<td><img src="icon" alt="Totals Row On/Off" /></td>
<td>Totals Row On/Off (F6) - Used to toggle totals view on and off on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td><img src="icon" alt="Target Hours On/Off" /></td>
<td>Target Hours On/Off (F7) - Used to toggle the view of target hours on and off on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Function</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Weekdays On/Off (F8)</td>
<td>Used to toggle the view of weekdays on and off on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Detailed Time Data (Control+F2)</td>
<td>Used to view time sheet detail on a selected row of the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Long Text (Control+Shift+F3)</td>
<td>Used to enter/view long text on a selected row on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Travel Expenses</td>
<td>Not in use</td>
</tr>
<tr>
<td>Check Entries (Control+F6)</td>
<td>Used to perform validation check on entries on Time Sheet: Data Entry View Screen</td>
</tr>
<tr>
<td>Legend</td>
<td>Used to view legend for a selected line on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Target Hours (Control+F12)</td>
<td>Used to apply target hours from the employee’s assigned work schedule</td>
</tr>
<tr>
<td>Reset Entries (Control+F11)</td>
<td>Used to reset entries on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Insert Row (Control+F4)</td>
<td>Used to insert a row for data entry on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Delete Line (Shift+F2)</td>
<td>Used to delete selected line on the Time Sheet: Data Entry View screen. Cannot be undone.</td>
</tr>
<tr>
<td>Copy Row (F5)</td>
<td>Used to copy a selected row on the Time Sheet: Data Entry View screen. Data can be changed after copy</td>
</tr>
<tr>
<td>Split Row (Control+F3)</td>
<td>Used to split a selected row on Time Sheet: Data Entry View Screen</td>
</tr>
<tr>
<td>Save As Template (Shift+F11)</td>
<td>Used to save entered data as template for future use on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Delete Template (Shift+F12)</td>
<td>Used to delete a previously saved template on the Time Sheet: Data Entry View screen</td>
</tr>
<tr>
<td>Previous Screen</td>
<td>Used to move view to previous week on the Time Sheet: Data Entry View screen</td>
</tr>
</tbody>
</table>
Next Screen – Used to move view to next week on the Time Sheet: Data Entry View screen

Release View – Not in use. Time should be entered using the Data Entry Profiles ending in “-L” which automatically release, approve, and save time

Save (Control+S) – Used to save data on the Time Sheet: Display Entry View screen. Time will be automatically released, approved, and saved.

**Time Entry Validation**

The following validations occur during time entry using CAT2:

- **Quota Availability** – CAT2 performs quota check during time entry to ensure that sufficient quota is available from current balances. A time record cannot be saved if an employee’s quota is exceeded.

- **Full-Day Absences** – CAT2 checks full-day absence to ensure leave does not exceed planned work schedule.

- **A/A Groupings** – CAT2 checks A/A groupings to ensure that a Temporary employee does not use an A/A time code that belongs to a full-time employee.

<table>
<thead>
<tr>
<th>Immediate</th>
<th>On Save</th>
</tr>
</thead>
<tbody>
<tr>
<td>A/A Codes Validity</td>
<td>Quota Availability</td>
</tr>
<tr>
<td>24 hr limit</td>
<td>Collision w/Full Day’s Absence</td>
</tr>
<tr>
<td></td>
<td>Employee Status (Active/Inactive)</td>
</tr>
</tbody>
</table>

**NOTE:** Validation errors must be corrected to save the time record containing the error.
Time Entry Error Messages

- Check Entries Feature
- Allows you to check entries before saving
- Errors and warnings are identified for resolution

Errors vs. Warnings

- **Errors** - Must be fixed before proceeding. Highlighted in red
  - Example – Invalid A/A code entered
- **Warnings** - A warning is an information message that can be heeded or ignored depending on the situation. Highlighted in yellow
  - Example – Number of hours entered exceed planned working times

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**EXERCISE 3.1: Record Time**

**SCENARIO**
You will enter time for an employee, Rita Henry. She is a FT/Positive Pay/Permanent employee. Rita has worked her entire work schedule with no exceptions.

**Instructions**

⚠️ **NOTE:** If the current week contains a holiday, the system will display a yellow warning message for hours entered on the holiday, if they are not coded as 9300.

1. Enter transaction code **CAT2** in the Command field and click the **Enter** button or press **Enter**.

2. Enter **NORML-SU** in the Data entry profile field and click the **Enter** button or press **Enter**. *(It should default since we enter NORML-SU in Exercise 1.3: Display Daily Target Hours (CAT3))*

3. Enter current date in the Key date field. *(It should default.)*

4. Click the **Personnel Selectn** button to access the Personnel Number Selection for Fast Data Entry Screen.
5. Complete the following field:

![PERNR #: Rita Henry FT/Positive/Permanent](image)

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel number</td>
<td>Use Employee (Rita Henry) from the list above.</td>
</tr>
</tbody>
</table>

6. Click the Execute button.

7. Highlight the Personnel number on the Time Sheet: Initial Screen.

8. Click the Enter Times button to access the Time Sheet: Data Entry View screen.

9. Click the Target Hours button to apply a full week of time with no exceptions. A “Target hours” dialog box is displayed.

10. Click the Yes button to insert a new line with Target Hours.

   📝 NOTE: You should now see a new line of data for your employee with 40 hours of A/A type 9500.

11. Click the Check Entries button. An Information dialog box is displayed.

12. Click the Continue (Enter) button to save your entries.

13. Click the Save button.

14. Click the Back button until you return to the SAP Easy Access screen.

This exercise is complete.
ADDITIONAL INFORMATION: If the week contains a holiday, Rita could take up to eight hours of Holiday Leave (A/A Type 9300) for that holiday. Since her workday schedule is for 10 hours a day / four days a week, she would have the option to use eight hours of Holiday Leave (AA Type 9300) and then use leave for the remaining two hours per agency's policy. Working a holiday would incur holiday Premium pay so she might also elect to take her holiday leave at a different time in accordance with her agency’s leave policy.

NOTE: The employee can code more than eight hours of Holiday Leave on a given day if they have the quota available to use. (This would be relevant around Veteran’s Day, Thanksgiving, and the December holidays where the employee can have more than eight hours Holiday Leave quota available.)

EXERCISE 3.2: Record Time with Leave

SCENARIO
You need to enter time for Sharon Fairbank for the current week. She is an FT/Negative Pay/Permanent employee. Sharon worked her regular schedule for Tuesday, Thursday, and Friday, took one day of vacation on Monday, and one day of sick time on Wednesday.

Instructions

1. Enter transaction code CAT2 in the Command field and click the Enter button or press Enter.

2. Enter NORML-SU in the Data entry profile field and click the Enter button or press Enter. (It should default.)

3. Enter the current date in the Key date field. (It should default.)

4. Click the Personnel Selectn button to access the Personnel Number Selection for Fast Data Entry Screen.
5. Complete the following field:

<table>
<thead>
<tr>
<th>PERNR #: Sharon Fairbank FT/Negative/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel number</td>
<td>Use Employee (Sharon Fairbank) from the list above.</td>
</tr>
</tbody>
</table>

6. Click the **Execute** button.

7. Highlight the **Personnel number** on the Time Sheet: Initial Screen.

8. Click the **Enter Times** button to access the Time Sheet: Data Entry View screen.

   Sharon has worked her regular hours of time – A/A type 9500 for Tuesday, Thursday, and Friday. Since she is a Negative Pay employee, you do not have to enter time worked for these days.

9. Click in the **Pers. No.** field on the first available line.

10. Click on the **matchcode** button and select the personnel number to add a line. The matchcode pop-up box is displayed.

11. Click the **Copy** to select the employee whose record you will process.

   You should now see a new line on Sharon’s record. Press **Enter** to display Sharon Fairbank’s name.

12. Enter **eight** hours of vacation using A/A type **9000** – approved leave for Monday.

13. Select the personnel number from the matchcode in the **Pers. No.** field to add a line.

   You should now see a new line for Sharon. Press **Enter** to display Sharon’s name.

14. Enter **eight** hours of sick time – A/A type **9200** for Wednesday.

15. Click the **Check Entries** button to see if there are any errors in your data entry. Correct any errors you encounter.
16. Click the **Continue (Enter)** button to save your entries.

17. Click the **Save** button.

18. Click the **Back** button to return to the SAP Easy Access screen.

This exercise is complete.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

**Multiple Selections for List Entry of Personnel in CAT2**

Multiple Selection allows you to access an input mode for adding:

- Select single values
- Select ranges
- Excluding single values
- Excluding ranges

To use multiple selections during time entry in CAT2:

1. Place your cursor in the Personnel Number field and click the Multiple Selection button.
2. After the Personnel Number selections are made, click the Execute button.

*TIP:* When using multiple sections, you can copy and paste values such as Personnel Numbers from a list using the **Copy from Clipboard** button.
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To Copy from Clipboard during Multiple Selections:

1. In your Word or Excel list, highlight the text you want to copy, e.g., a list of Personnel Numbers.
2. Press the Control and C keys on your keyboard to copy the list into the Clipboard.
3. In the Integrated HR/Payroll System, access the Multiple Selections dialog box for the field whose values you will load from the Clipboard.
4. Click the Copy from Clipboard button to paste values into the multiple selection dialog box.

EXERCISE 3.3: Record Time with Leave

**SCENARIO**

Part 1: You will enter time for two positive time recording employees. Tomeka Avans worked her full work schedule with no exceptions. Sarah Beckham was out sick on Tuesday and worked the remaining week based on her planned working time.

- Tomeka Avans (positive)
- Sarah Beckham (positive)

Instructions

- **NOTE:** Sometimes the Execute button is called the Copy button on the CAT2 screen.
- **NOTE:** During a week with a holiday, you can receive a Warning message on the status bar at the bottom of the screen. Press the Enter key to override and continue processing. If you are processing more than one employee time record, you must press Enter for each employee.

1. Enter transaction code **CAT2** in the Command field and click or press Enter.
2. Enter **NORML-SU** in the Data entry profile field and click the **Enter** button or press Enter. *(It should default.)*
3. Enter the current date in the Key date field. *(It should default)*
4. Click the **Personnel Selectn** button to access the Personnel Number Selection for Fast Data Entry Screen.
5. Place your cursor in the Personnel Number field and click the **Multiple Selection** button located to the right of the field.
6. On the Multiple Selection for Personnel dialog box, enter the Personnel Numbers in the Select Single Values tab for employees Tomeka Avans and Sarah Beckham located below.

<table>
<thead>
<tr>
<th>PERNR #: Tomeka Avans FT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERNR #: Sarah Beckham PT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

---

**TIP:** When using multiple sections, you can copy and paste values from a list and use the Copy from Clipboard button.

7. Click the **Copy** button to close the Multiple Selection for Personnel dialog box and return to the Personnel Number Selection for Fast Data Entry screen.

8. Click the **Execute** button.

   **NOTE:** The Execute button is also called the Copy button at times.

9. Click the **Select All Persons** button to highlight the Personnel numbers listed on the Time Sheet: Initial Screen.

10. Click the **Enter Times** button to access the Time Sheet: Data Entry View screen.

   **NOTE:** You should now see two lines for each employee entered – the first **Target hours** and the second **Totals row**.
11. Add a new line for Employee Tomeka Avans, by placing your cursor on one of Tomeka’s lines in the Personnel field and clicking the Insert Row (Ctrl+F4) button.

12. Highlight the new line you just added for Tomeka and then click the Target Hours button to apply a full week of time with no exceptions.

   NOTE: If you do not select the line for Tomeka before clicking on the Target Hours button, you will add a line of Target Hours to each employee on your list.

13. Insert a new line for Employee Sarah Beckham.

14. Enter four hours of Sick Leave (A/A Type 9200) on Tuesday for Employee Sarah Beckham.

15. Add a new line for Employee Sarah Beckham, by placing your cursor on one of Sarah’s line in the Personnel field and clicking the Insert Row button.

16. Highlight the new line you just added for Sarah and then click the Target Hours button to apply a full week of time difference between the target hours and the hours that have already been entered to a line in the data entry section.

17. Click on the Check Entries button.

18. Click the Continue (Enter) button to save your entries.

19. Click the Save button.

20. This exercise is complete.

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Correcting Entries

Entries can be corrected in previous records. Integrated HR/Payroll System business practices allow for you to go back six weeks. For any corrections that are more than six weeks back, you will need to submit a ticket to BEST and ask for the wall to be lowered.

Approved changes are picked up the next time that Time Evaluation is run.

Only Time Administrators can change entries for ESS users when the time has already been approved via MSS.

ESS users can correct time until the time is approved in MSS.

Agencies will decide how far back they want to go to make corrections. Retroactive calculations require every subsequent period to be re-processed.
To make a time correction:

1. Access employee time entry via CAT2.
2. Use appropriate key date for correction. You can scroll forward or backward a certain number of weeks only.
3. Adjust entry(s) as needed.
4. Always add a note to justify why the entry(s) were changed – important for auditing purposes.
5. Save the record.

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EXERCISE 3.4: Edit Time for a List of Employees – CAT2

SCENARIO

You will edit some of the entries for the group of employees whose time you just entered.

Part 1: Positive Time Recording

- **Employee Tomeka Avans** – add two additional hours worked for Thursday
- **Employee Rita Henry** – add 10 hours worked of shift premium time for Friday

Part 2: Negative Time Recording

- **Employee Sharon Fairbank** – add two additional hours of time worked A/A type 9500 to each day that she worked.

Instructions

- Remember that Negative time entry employees do not have to enter time on a holiday unless they worked the holiday.
- A/A type 9400 results in docking of pay and should only be used in accordance with OSHR policy.

Part 1: Positive Time Recording

1. Enter transaction code **CAT2** in the Command field and click the Enter button or press Enter.

2. Enter **NORML-SU** in the Data entry profile field and click the Enter button or press Enter. *(It should default.)*
3. Enter the current date in the Key date field. *(It should default)*

4. Click the **Personnel Selectn** button to access the Personnel Number Selection for Fast Data Entry Screen.

5. Place your cursor in the **Personnel Number** field and click the **Multiple Selection** button located to the right of the field.

6. On the Multiple Selection for Personnel dialog box, enter the Personnel Numbers for employees **Tomeka Avans and Rita Henry**.

   **PERNR #: Tomeka Avans FT/Positive/Permanent**

   | 1 | 80000430 | 6 | 80000435 | 11 | 80000440 | 16 | 80000445 |
   | 2 | 80000431 | 7 | 80000436 | 12 | 80000441 | 17 | 80000446 |
   | 3 | 80000432 | 8 | 80000437 | 13 | 80000442 | 18 | 80000447 |
   | 4 | 80000433 | 9 | 80000438 | 14 | 80000443 | 19 | 80000448 |
   | 5 | 80000434 | 10 | 80000439 | 15 | 80000444 | 20 | 80000449 |

   **PERNR #: Rita Henry FT/Positive/Permanent**

   | 1 | 80000450 | 6 | 80000455 | 11 | 80000460 | 16 | 80000465 |
   | 2 | 80000451 | 7 | 80000456 | 12 | 80000461 | 17 | 80000466 |
   | 3 | 80000452 | 8 | 80000457 | 13 | 80000462 | 18 | 80000467 |
   | 4 | 80000453 | 9 | 80000458 | 14 | 80000463 | 19 | 80000468 |
   | 5 | 80000454 | 10 | 80000459 | 15 | 80000464 | 20 | 80000469 |

7. Click the **Copy** button to close the Multiple Selection for Personnel dialog box and return to the Personnel Number Selection for Fast Data Entry screen.

8. Click the **Execute** button.

9. Click the Select **All Persons** button to highlight the Personnel numbers listed on the Time Sheet: Initial Screen.

10. Click the **Enter Times** button to access the Time Sheet: Data Entry View screen.

11. On **Employee Tomeka Avans’** record, add an additional **two** hours of time worked A/A type **9500** for Thursday by changing the original eight hours entry to **10** hours.
You may add a new line for Tomeka Avans’ and enter the additional two hours to the new line.

12. Place your cursor in the field in which you changed the eight hours to 10 hours on Thursday and click the Long Text button to access the Change Time Entry screen.

13. Enter a sample note such as “Employee submitted a revised timesheet which has been approved by supervisor. Tomeka worked an additional two hours on Thursday”

Best practice: Include your first initial, middle initial and last name as well as the current date when adding a Long Text.

14. Click the Back button to return to the Time Sheet: Data Entry View screen.

15. Employee Rita Henry has agreed to work an Evening Shift Premium schedule for Friday of the week. Add 10 hours of time worked A/A type 9500.

16. You must also add the code for evening shift premium in the P field (Premium field) in order for Rita to receive the evening shift premium pay. Click the matchcode button for the Premium field and select the code for Evening Premium.

17. Check your entries.

You will see a warning that lets you know that Rita Henry and Tomeka have exceeded their target hours. Remember that you scheduled Rita to work an extra shift earlier in this exercise. You scheduled Tomeka to work additional hours on Thursday. You will need to press ENTER to bypass the warning and proceed with processing.

18. Click Continue (Enter) button or press Enter to bypass the warning.

19. Click the Save button.

20. Click the Continue button or press Enter to bypass the warning.

Part 2: Negative Time Recording

21. Click the Personnel Selectn button to access the Personnel Number Selection for Fast Data Entry Screen.

22. Place your cursor in the Personnel Number field
23. Complete the following field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel number</td>
<td>Use Employee (Sharon Fairbank) from the list above.</td>
</tr>
</tbody>
</table>

24. Click the **Execute** button.

25. Highlight the **Personnel number** on the Time Sheet: Initial Screen.

26. Click the **Enter Times** button to access the Time Sheet: Data Entry View screen.

27. Locate employee Sharon Fairbank and add two hours of time worked A/A type 9500 to each day that she worked.

   **NOTE:** Remember that Negative time entry employees do not have to enter time on a holiday unless they worked the holiday.

28. Check your entries.

29. Click **Continue (Enter)** button or press **Enter**.

30. Click the **Save** button.

31. Click the **Back** button to return to the SAP Easy Access screen.

This exercise is complete.
EXERCISE 3.5: Practice – Time Entry Techniques

SCENARIO
This demonstration shows the following time entry techniques:

- **Target Hours** – allows you to apply the employees planned work schedule.
- **Adding lines** – allows you to insert an additional blank line for the selected employee.
- **Comments** – ability to add in comments for each entry. Can be used to capture explanatory text.
- **Totals** – allows you to view totals during data entry. Alleviates need to perform manual calculations.

Instructions

- Comments made in the timesheet can be viewed only in the CAT2, CAT3 or CATS_DA transactions. There is no mechanism to report on these out of the Integrated HR/Payroll System.

1. Enter transaction code **CAT2** in the Command field and click the Enter button or press Enter.

2. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data entry profile</td>
<td>NORML-SU</td>
</tr>
<tr>
<td>Key date</td>
<td>Current date <em>(It should Default)</em></td>
</tr>
</tbody>
</table>

3. Click the **Personnel Selectn** button to access the Personnel Number Selection for Fast Data Entry Screen.
4. Complete the following field:

<table>
<thead>
<tr>
<th>PERNR #: Sarah Beckham PT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1   80000410  6</td>
</tr>
<tr>
<td>2   80000411  7</td>
</tr>
<tr>
<td>3   80000412  8</td>
</tr>
<tr>
<td>4   80000413  9</td>
</tr>
<tr>
<td>5   80000414 10</td>
</tr>
</tbody>
</table>

5. Click the **Execute** button.

6. Highlight the **Personnel number** on the Time Sheet: Initial Screen.

7. Click the **Enter Times** button to access the Time Sheet: Data Entry View screen.

8. Click the Next screen button to display next week’s schedule.

9. Review the displayed screen. Make note of the **Target Hours** row showing the planned work schedule.

10. Click the **Target Hours** button to apply a full week of time based on the planned work schedule for the week. The “Target hours” dialog box displays.

11. Click **Yes** to insert a line into the Time Sheet with the target hours applied with A/A type 9500. The Time Sheet now shows three lines for the Employee – the Target hours, the Totals row, and the line of actual hours worked.

12. Add a new line by placing your cursor on one of the employee’s line in the Personnel field and clicking the **Insert Row** button.

13. Enter A/A type 9200 and **four** hours of sick leave for Thursday. Be sure to place a **zero** in the four hours of 9500 shown for Thursday to remove the time worked entry previously recorded.

14. Place your cursor in the field in which you recorded sick time on Thursday and click the **Long Text** button to access the Change Time Entry screen.
15. Enter a **sample note** such as “Dr note provided.”

   - **Best practice:** Include your first initial, middle initial and last name as well as the current date when adding a Long Text.

16. Click the **Back** button to return to the Time Sheet: Data Entry View screen.

   - The time sheet should now show 16 hours of 9500 time and four hours of 9200 time.

17. You realize that Sarah took two hours of sick and two hours of vacation on Thursday instead of four hours of sick.

18. Add a new line by placing your cursor on one of the employee's line in the Personnel field and clicking the **Insert Row** button.

19. On the new line created, enter A/A **9000** and **two** hours of approved leave Thursday.

20. Reduce the **9200** hours on Thursday from four hours to **two** hours.

   - Your timesheet should now show 16 hours of 9500 time, two hours of 9200 time, and two hours of 9000 time.

21. Click the **Check Entries** button. An information dialog box is displayed.

22. Click the **Continue (Enter)** button to accept the information.

23. Click the **Save** button.

24. Click the **Back** button until you return to the SAP Easy Access screen.

**This exercise is complete.**

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

**Comp Balance Check when Recording Adverse Weather**

With the changes to the Adverse Weather policy effective 1/1/2015, an employee is **not** allowed to use Adverse Weather Leave if the employee has available Comp Leave.

A new validation in the CAT2 will prevent a Time Admin from keying Adverse Weather Leave (A/A 9545) in the timesheet if there is an available balance in any of the Comp Leave quotas for the requesting employee. The validation will consider current balances and take into account any Approved Leave keyed prior to the A/A 9545 entry on the timesheet.
If an employee has Comp Balances to cover the amount or a portion of the Adverse Weather leave keyed, the system will generate an error and the entry should be changed to approved Leave (A/A 9000).

If an employee does not have any Comp Balance, the system will generate a warning message. The message is a reminder that the manager must approve the use of Adverse Weather leave based on the provisions outlined in the Adverse Weather policy.

---

**EXERCISE 3.6: Record Time Using Adverse Weather Leave**

**SCENARIO**
You need to enter time for Rita Henry and Wanda Hill for the current week. They worked their regular hours except for Tuesday. The employees did not report to work due to adverse weather. The National Weather Service issued a severe weather warning for weather conditions on that day.

**Part 1: Positive Time Recording**
- Employee Rita Henry

**Part 2: Negative Time Recording**
- Employee Wanda Hill

**Instructions**

**Part 1: Positive Time Recording**

1. Enter transaction code **CAT2** in the Command field and click or press Enter.
2. Enter **NORML-SU** in the Data entry profile field and click or press Enter.
3. Enter the current date in the Key date field. (It should default!)
4. Click the **Personnel Selectn** button to access the Personnel Number Selection for Fast Data Entry Screen.
5. Place your cursor in the **Personnel Number** field and enter Rita Henry’s information.
6. Click the **Execute** button.

7. Highlight the **Personnel number** listed on the Time Sheet: Initial Screen.

8. Click the **Enter Times** button to access the Time Sheet: Data Entry View screen.

9. Click the **Next screen** button to display the next week’s schedule which has no time entries recorded.

10. Add a new line for **Employee Rita Henry**.

11. Enter 10 hours of Adverse Weather Leave (A/A 9545) on Tuesday for **Employee Rita Henry**.

12. Add a new line for Employee Rita Henry.

13. Highlight the new line you just added for Rita and the click the **Target Hours** button to apply a full week of time.

14. Check your entries.

   You will see an error that lets you know that Rita Henry has eight hours of Comp balances available and that A/A 9000 should be recorded for the remaining available hours instead of A/A 9545 (Adverse Weather). Since the employee has Comp Balances to cover all or a portion of the amount of Adverse Weather leave keyed, the entry should be changed. You cannot bypass this error message without making the time entry corrections. By double clicking on the error message, the full text will be displayed in a separate pop-up window.

15. Click the **Continue (Enter)** button to close the display message box.

16. For Rita Henry, change the A/A type 9545 to **9000** – Approved Leave for Tuesday of the work week. Since the error message shows the available comp balance of eight hours, change the 10 hours entry to **8.00** hours.

17. To account for the remaining two hours for Tuesday, add a new line for A/A 9545 and enter the **2.00** remaining hours to equal a total of 10 hours for the day.
18. Check your entries.

You will see a warning that lets you know that a supervisor must approve the use of Adverse Weather Leave based on the provisions outlined in the Adverse Weather Leave Policy. You can press ENTER to bypass the warning and proceed with processing.

19. Click the **Continue (Enter)** button to close the display message box.

20. Click **Save**

21. Click **Continue (Enter)** button to bypass the warning message.

22. Click the **Back** button to return to the SAP Easy Access screen.

**Part 2: Negative Recording Time**

1. Click the **Personnel Select** button to access the Personnel Number Selection for Fast Data Entry Screen.

2. Place your cursor in the **Personnel Number** field and enter Wanda Hill’s information.

| PERNR #: Wanda Hill FT/Negative/Permanent |
|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| 1               | 80000470        | 6               | 80000475        | 11              | 80000480        | 16              | 80000485        |
| 2               | 80000471        | 7               | 80000476        | 12              | 80000481        | 17              | 80000486        |
| 3               | 80000472        | 8               | 80000477        | 13              | 80000482        | 18              | 80000487        |
| 4               | 80000473        | 9               | 80000478        | 14              | 80000483        | 19              | 80000488        |
| 5               | 80000474        | 10              | 80000479        | 15              | 80000484        | 20              | 80000489        |

3. Click the **Execute** button.

4. Highlight the Personnel number listed on the Time Sheet: Initial Screen.

5. Click the **Enter Times** button to access the Time Sheet: Data Entry View screen.

6. Click the **Next screen** button to display the next week’s schedule which has no time entries recorded.

7. Insert a new line for **Employee Wanda Hill** (who is a Negative time entry employee).

8. Enter eight hours of Adverse Weather Leave (A/A 9545) on Tuesday for Employee Wanda Hill
9. Check your entries.

   **NOTE:** You will see a warning that lets you know that a supervisor must approve the use of Adverse Weather Leave based on the provisions outlined in the Adverse Weather Leave Policy. You can press ENTER to bypass the warning and proceed with processing.

10. Click the **Continue (Enter)** button to close the display message box.

11. Click **Save**

12. Click **Continue (Enter)** button to bypass the warning message.

6. Click the **Back** button to return to the SAP Easy Access screen.

This exercise is complete.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

**Tending to ESS Employees**

Display Working Times (CATS_DA) can be run for time that has been released but not approved. Run the report using the Personnel number and restrict the display to the Processing Status 20 – time Released for approval.

To resolve the unapproved time, contact the Manager and request they use the Manager Self Service (MSS) Portal to approve.

Alternatively, if the manager is not available, the backup Time Approver can use Approve Working Time (CATS_APPR_LITE) to approve the time directly in the Integrated HR/Payroll System. This responsibility is given to some Payroll and HR Master Data Administrators in agencies using ESS.

**Failure to Release Time**

- ESS Time must be released by the employee before it can be approved by the supervisor.

- Time Approvers can approve time if the Manager fails to do so. Time Administrators cannot approve ESS entries.

- Time administrators can enter time in the Integrated HR/Payroll System for ESS users that cannot make entries. Time entered by the Time Admin on behalf of an ESS user is saved as approved time. It would be an exception to normal procedures.

**Corrections After Approval**

- Time Administrators can make approved changes.
Employees can receive errors and/or warnings when entering time in ESS (for example, time keyed to A/A 9545, Adverse Weather Leave).

### Additional Resources

The **ESS – Comp Balance Check when Recording Adverse Weather Leave** bulletin is available on the OSC Training website in Help Documents. Additional support material is available on the OSC Training website in Help Documents.
- *Time Approver job aid*
- *CATS APPRLITE Approve Time Records BPP*

### Knowledge Check

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. True or False – Time cannot be corrected after payroll has finalized.</td>
<td></td>
</tr>
<tr>
<td>2. True or False – Time Administrators should choose only data entry profiles designated as list.</td>
<td></td>
</tr>
<tr>
<td>3. True or False – Time Administrators must approve ESS time that has been released but not approved by a Manager.</td>
<td></td>
</tr>
<tr>
<td>4. What is the description for A/A type 9500?</td>
<td></td>
</tr>
<tr>
<td>5. Target hours can be viewed in what transactions?</td>
<td></td>
</tr>
<tr>
<td>6. Yellow highlighted messages identify _____.</td>
<td></td>
</tr>
<tr>
<td>7. Red highlighted messages identify _____.</td>
<td></td>
</tr>
<tr>
<td>8. What does A/A refer to when entering time?</td>
<td></td>
</tr>
</tbody>
</table>

### Summary

In this lesson, you learned to:
- Record, review, and correct time in the Integrated HR/Payroll System
- Identify new time codes using Time Administration Quick Reference Guide
Lesson 4: Advanced Time Reporting

Objectives

- Describe Substitutions
- Describe use of charge objects
- Describe Variants

Terms and Concepts

- **Substitutions** – Overrides daily work schedule with new shift schedule. Used when an employee makes a shift change that is premium pay relevant. Refer to the OSHR policies for questions about substitutions.

- **Charge Objects** – Charge Objects offer a way for agencies to track hours against projects, funds, grants and programs. Charge Objects can also include details about activity types and/or specific tasks. Hours recorded to Charge Objects will be available for reporting. Reporting the cost of those hours recorded to a specific Charge Object is not supported in the Integrated HR/Payroll System.

- **Variants** – A Variant in the Integrated HR/Payroll System is a set of saved selection criteria to be used during data entry or reporting. Described in detail on slide following the Data Entry Profile slide.

Substitutions

Below are ways that employees get premium pay which were discussed in lesson 1. The position must be eligible, and the employee must work the hours and have the right schedule.

- **Premium pay – derived from Work Schedule**

- **Premium pay – derived from Substitution**

- **Premium pay – derived from push codes**

Substitutions are created for an entire shift and overrides the daily Work Schedule assigned on IT0007, Planned Working Time. Employee can then:

- Record work time
- Record leave time
**Examples of Daily work Schedules:**

- 1D08 Day Shift – 8 hours
- 1E08 Evening Shift – 8 hours
- 1N08 Night Shift – 8 hours

If an employee is asked to work an Evening or Night shift on a non-scheduled work day, a substitution must be created for that work day. Once the substitution has been created, the HR/Payroll System recognized that day as a scheduled work day and the employee receives the proper premium pay for the hours recorded.

**Weekends**

- The system always knows weekends. Weekends start with Night shifts on Friday. An employee who records work time on Saturday who is eligible for Weekend premium pay will receive weekend premium pay without a substitution.

******************************************************************

**EXERCISE 4.1: Substitute Work Schedule**

**SCENARIO**

An employee who works nights is asked to work an extra shift on Saturday which is her day off. Her position is defined as Night Premium eligible. All hours worked will receive night shift premium automatically if it is a scheduled work day. If she works any hours of night shift on a non-scheduled work day, the Create Work Schedule Substitution process must be used to record her hours.

To ensure proper shift premium is received, perform a daily substitution to make the day off a normal work day. The substitution should be made for Saturday which is her standard day off.

☞ **NOTE:** Ensuring that employees are substituted properly when they work at times other than their planned work schedule is very important.

**Instructions**

1. Enter transaction code **PA61** in the Command field and click the **Enter** button or press **Enter**.
2. Complete the following fields:

<table>
<thead>
<tr>
<th>PERNR #: Tomeka Avans FT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  80000430  6  80000435  11  80000440  16  80000445</td>
</tr>
<tr>
<td>2  80000431  7  80000436  12  80000441  17  80000446</td>
</tr>
<tr>
<td>3  80000432  8  80000437  13  80000442  18  80000447</td>
</tr>
<tr>
<td>4  80000433  9  80000438  14  80000443  19  80000448</td>
</tr>
<tr>
<td>5  80000434  10  80000439  15  80000444  20  80000449</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infotype</td>
<td>2003 for Substitutions</td>
</tr>
<tr>
<td>Personnel number</td>
<td>Use Tomeka Avans from the information above.</td>
</tr>
</tbody>
</table>

3. Click the Create button.

4. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
<td>Saturday of current week</td>
</tr>
<tr>
<td>To</td>
<td>Saturday of current week</td>
</tr>
<tr>
<td>Subs. Type</td>
<td>Defaults to 02 – do not change</td>
</tr>
<tr>
<td>Daily work schedule</td>
<td>1D08 – 8 Day</td>
</tr>
</tbody>
</table>

5. Click the Save button.

6. Click the Back button to return to the SAP Easy Access screen.

Your exercise is complete.
Charge Objects

Agencies can use Charge Objects to track hours against projects, funds, grants, and programs. Hours recorded to Charge Objects will be available for reporting.

Reporting the cost of hours recorded to a specific Charge Object is not supported in the Integrated HR/Payroll System.

Charge Objects are entered using specific charge object data entry profiles (e.g., Charge 4-L).

Each Agency will maintain its own list of Charge Objects in the Integrated HR/Payroll System.

The four levels are optional, not required. Agencies using just a single number, up to 12 digits, can continue to use just that identifier.

For additional information about Charge Objects, have your Training Agent register you for Web Based Training TM330.

EXERCISE 4.2: Time Entry Using Charge Objects

SCENARIO
You will enter time for Employee Sarah Beckham using one charge object.

NOTE: The charge object field is free form. It is helpful to keep an Excel list of valid charge objects that can be used to copy and paste valid charge objects during time entry.

Instructions

In this List profile, the Time Admin makes entries directly to the charge object field. It is not restricted to specific values. In ESS, an employee doing their own time entry is restricted to a “Worklist” of values they can select to charge their time.

NOTE: Not every Agency will be using charge objects.

1. Enter transaction code CAT2 in the Command field and click the Enter button or press Enter.
2. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data entry profile</td>
<td>CHARGE 1L (This is different than the one you have been using.)</td>
</tr>
<tr>
<td>Key date</td>
<td>Current date</td>
</tr>
</tbody>
</table>

3. Click the **Personnel Selectn** button to access the Personnel Number Selection for Fast Data Entry Screen.

4. Enter employee Sarah Beckham from the above list in **Personnel Number** field.

5. Click the **Execute** button.

6. Highlight the employee shown on the Time Sheet: Initial screen.

7. Click the **Enter Times** button to access the Time Sheet: Data Entry View screen.

8. Click the **Next screen** button to display next week’s schedule.

9. Click the **Target Hours** button to apply her planned work schedule for next employee.

10. Click the **Yes** to insert a line with target hours for the employee.

   ✍️ **NOTE**: You should now see a new line for Sarah with A/A type 9500 matching her planned work schedule.

11. Enter **Project 1234** in the Charge Object field.

12. Click on the **Check Entries** button.

13. Click the **Continue (Enter)** button to save your entries.

14. Click the **Save** button.
15. Click the **Back** button to return to the SAP Easy Access screen.

This exercise is complete.

********************************************************************

Variants

A Variant in the Integrated HR/Payroll System is a set of saved selection criteria to be used during data entry or reporting.

Advantages of variants:

- Faster entry
- Reduced errors
- Can be used by more than one Time Administrator

**To create a Variant for Record Time Entry:**

1. Enter Personnel numbers using Multiple Selection functionality.
   2. Click GoTo > Variants > Save As Variant from the menu path.
   3. Enter Variant Name and Description.
   4. Click the **Save** button.

**To use a Variant:**

1. Click **Get Variant** button or select menu path Goto > Variant > Get.
   2. Double-click desired Variant to select.
   3. The Integrated HR/Payroll System will populate CAT2 with Personnel numbers in Variant.
   4. Modify and enter data as needed.

 **NOTE:** You can change variants by saving the new variant with the same name. The system will warn you that the variant will be overwritten.
EXERCISE 4.3: Create Variant for Time Entry

**SCENARIO**
You want to create a time entry variant for use during future time entry for the Dept. of Cultural Resources Museum of History employee.

**CAUTION**
Critical Note: After you click Execute (Copy) to close the Multiple Selection for the Personnel dialog box, do NOT execute a second time!

**Tips for Variants**
- The Protect Variant selection is optional. When selected, it will allow others to view but not change your variant.
- After the variant is saved, it can be used going forward during the time entry process in CAT2 to pull in the list of employees.
- If you have only one variant, you will see it displayed only after you click Execute to close the ABPB Variant Directory dialog box. If you have created more than one variant, a pop-up box will display, allowing you to select from the box.
- The first value in the variant displays in the Personnel number field along with a small green colored area on the Multiple Selection button. This indicates that multiple selections are active for this field.

**Instructions**
1. Enter transaction code CAT2 in the Command field and click the Enter button or press Enter.
2. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data entry profile</td>
<td>NORML-SU</td>
</tr>
<tr>
<td>Key date</td>
<td>Current Key date</td>
</tr>
</tbody>
</table>

3. Click the Personnel Selectn button to access the Personnel Number Selection for Fast Data Entry Screen.
4. Place your cursor in the **Personnel Number** field and click the **Multiple Selection** button located to the right of the field.

5. On the Multiple Selection for Personnel dialog box, enter the Personnel Numbers for employees Tomeka Avans, Sarah Beckman, and Rita Henry.

<table>
<thead>
<tr>
<th>PERNR #: Tomeka Avans FT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERNR #: Sarah Beckman PT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERNR #: Rita Henry FT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

6. Click the **Copy** button to close the Multiple Selection for Personnel dialog box and return to the Personnel Number Selection for Fast Data Entry screen.

**CRITICAL NOTE:** Do not execute a second time!
7. From the menu, select **Goto > Variants > Save as Variant** or click the **Save As Variant** button to access the Variant Attributes screen.

8. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variant Name</td>
<td>TRG_VariantXXX (XXX = your initials...for training only) <strong>Type carefully!</strong></td>
</tr>
<tr>
<td>Descript.</td>
<td>Time entry DCR/HisMus EE XXX</td>
</tr>
<tr>
<td>Protect variant</td>
<td>Click this selection box</td>
</tr>
</tbody>
</table>

**NOTE:** The Protect Variant selection is optional. When selected, it will allow others to view but not change your variant.

9. Click the **Save** button and return to the Personnel Number Selection for Fast Data Entry screen. The message ‘Variant was saved’ displays.

**NOTE:** The variant can be used from this point forward during Time Entry in CAT2 to pull in the list of employees.

10. Click the **Back** button to return to Time Sheet: Initial Screen.

To view the variant:

11. Click the **Personnel Selection** button to access the Personnel Number Selection for Fast Data Entry screen.

12. Click the **Get Variant** button to access the ABAP Variant Directory dialog box.

13. Verify that your **Training User ID** is displayed in the Created by field.

14. Click **Execute** to close the ABAP Variant Directory dialog box and apply the variant.

**NOTE:** If you have only one variant, it will display. If you have more than one variant created, a pop-up box with a list of the variants will display. You would then select from the list.

**NOTE:** The first value in the variant displays in the Personnel number field along with a small green marking on the Multiple Selection button. This indicates that multiple selections are active for this field.

15. From this point forward, you could proceed with time entry.
16. Click the Back button until you return to the SAP Easy Access screen.

This exercise is complete.

K**N**OWLEDGE **C**HECK

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. True or False – Time Administrators must manually calculate premium pay.</td>
<td></td>
</tr>
<tr>
<td>2. True or False – The Integrated HR/Payroll System has a limit to the number of premium pay relevant substitutions that can be made during a given work schedule.</td>
<td></td>
</tr>
<tr>
<td>3. True or False – All work hours should be recorded under the 9500 A/A type.</td>
<td></td>
</tr>
<tr>
<td>4. What do you create to override an employee's daily work schedule?</td>
<td></td>
</tr>
<tr>
<td>5. What are the three advantages of creating a variant?</td>
<td></td>
</tr>
</tbody>
</table>

**SUMMARY**

In this lesson, you learned to:

- Describe Substitutions
- Describe use of charge objects
- Describe Variants
Lesson 5: Time Evaluation and Time Transfer Specifications

Objectives

- Describe time evaluation
- View common time evaluation error messages
- Describe 2012s

Terms and Concepts

- **Time Evaluation** – Automated nightly batch Job that reviews approved time.
  - calculates planned time and overtime
  - determines premium pay (shift pay, holiday premiums)
  - converts recorded time into codes to be used by Payroll
- **Time Evaluation Error Log** – Generated during Time Evaluation run
- **2012s** – Personal Time Transfer Specifications are used to affect an employee’s pay
**Time Evaluation – What Goes In**

Time Evaluation determines:

- OT/Comp Time
- Premium Pay
- Leave Offsets
- Recovery of outstanding liabilities

Payroll picks up Time Evaluation results and generates pay checks.

---

**Time Evaluation – What Comes Out**
Time Evaluation Messages

One of the primary responsibilities of the Time Administrator will be to review the error log generated during Time Evaluation.

This is accomplished via the Time Evaluation Error Messages transaction (PT_ERL00).

Messages in red are hard error codes and must be corrected.

If you are interested in viewing only the error messages, you may key "E" in the Message type field.

**TIP:** Time Administrators can save time generating this report by setting up a Variant containing the Personnel Numbers of the employees that they monitor in their agency and the messages that require action.

---

**Additional Resources**

Refer to the OSC Training website in HELP documents for more information about Time Evaluation Error Messages and a complete list of potential error messages.

Search for the following support document title:

- Common Time Evaluation Error Messages job aid
EXERCISE 5.1: Display Time Evaluation Messages (PT_ERL00)

You need to view Time Evaluation error message(s) for Anthony Ramirez.

NOTE: When executing this troubleshooting report, it is recommended to use only the relevant period unless specifically a single employee due to the large number of records.

Instructions
1. Enter transaction code PT_ERL00 in the Command field and click or press (Enter).
2. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
<td>Other Period - Date Selection Period To 12/31/9999</td>
</tr>
<tr>
<td>Personnel number</td>
<td>Employee Anthony Ramirez</td>
</tr>
<tr>
<td>Message type</td>
<td>E</td>
</tr>
</tbody>
</table>

3. Click the Execute button to run the report.
4. Review the displayed messages.
   
   NOTE: If you do not key “E” in the Message type field, a message for each condition detected during Time Evaluation is displayed. The conditions may be warnings or errors. For this reason, there can be more than one message of the same kind for an employee. The messages will recur until the condition which caused the message is resolved.

5. Click the Back button until you return to the SAP Easy Access screen.

This exercise is complete.
Research Common Time Evaluation Warnings and Errors

Contact the BEST Shared Services Center if you encounter errors that you are unable to resolve. Messages will recur until they are resolved, therefore, it is important to monitor them on a regular basis.

Some messages are warnings and may not need to be corrected. Others that display in red are “hard stops” that prevent the employee’s time from processing. They need to be corrected for the employee’s time to process.

<table>
<thead>
<tr>
<th>Msg Type</th>
<th>Description</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>A2</td>
<td>Holiday not taken</td>
<td>Must determine if Holiday WAS taken, or WORKED. Correct timesheet OR contact the Leave Admin</td>
</tr>
<tr>
<td>B1, B5, B6</td>
<td>Not eligible for premium</td>
<td>(all types) Need to check employees Time Management Settings on Time Statement</td>
</tr>
<tr>
<td>B7</td>
<td>Minimum reqd hrs not recorded</td>
<td>Employee will be docked when LWOP is recorded. Check entries</td>
</tr>
<tr>
<td>B9</td>
<td>50% not reached no leave accrued</td>
<td>Employee has not achieved 50% of work schedule and, therefore, has not accrued leave. Check entries for accuracy.</td>
</tr>
<tr>
<td>D6</td>
<td>Error Message: Hours w/Special Leave &gt; Expected</td>
<td>Change time entry to another type of Leave</td>
</tr>
<tr>
<td>ZV, ZW, ZX</td>
<td>Error Messages: Must reconcile liability</td>
<td>Employee liability (Advance Vacation, Adverse Weather, or Sick) must be reconciled. See Integrated HR/Payroll System Bulletin and Job Aid</td>
</tr>
</tbody>
</table>
2012s Time Transfer Specifications

**Because 2012s can affect employee pay, they are maintained by the HR Master Data Maintainers.** As Time Administrators, it is important to know that they exist, but you will not have the ability to create or change them.

IT2012 is used to recover an Adverse Weather liability. Leave Administrators have security access to IT2012 for Adverse Weather recovery.

- These are Personal Time Transfer Specifications that can affect an employee’s pay.
- Used to turn on or off pay relevant behaviors for individuals
- Used to track start and end dates for incentive pay contracts
- Used to isolate employees with exceptions to routine time (OT and/or leave accruals)

**2012s Subtypes and Their Uses**

IT2012s are set up by the HR Master Data Maintainer.

<table>
<thead>
<tr>
<th>Subtype</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Z009</td>
<td>Pay Immediate After 10</td>
<td>Forces the first 10 hours (over the min. required work hours) to go to the Comp Time quota, and anything over that to be paid</td>
</tr>
<tr>
<td>Z020</td>
<td>Immediate Payout (OT)</td>
<td>Turns on Immediate Payout for OT for a specific date range</td>
</tr>
<tr>
<td>Z040</td>
<td>Pay Immediate After 4</td>
<td>Forces the first four hours (over the min. required work hours) to go to the Comp Time quota, and anything over that to be paid</td>
</tr>
<tr>
<td>ZAWR</td>
<td>Makeup Adv Wthr</td>
<td>Used to capture AW with Approved Leave then LWOP, if needed. (≥7/1/2015)</td>
</tr>
<tr>
<td>ZAWB</td>
<td>Makeup Adv Wthr f/ Bonus</td>
<td>Used to capture AW with Bonus Leave then LWOP, if needed. (≥7/1/2015)</td>
</tr>
</tbody>
</table>
Infotype 2012, Subtypes to Recover Adverse Weather Owed

Adverse Weather liability hours that have not been made up within 90 days will result in an error message being generated in Time Evaluation: ZW – “Must Reconcile Adv. Wea. Liability.” Time Evaluation messages can be viewed in transaction PT_ERL00.

⚠️ NOTE: The Adverse Weather aging period was updated from 365 days to 90 days in the Adverse Weather policy revision effective 1/1/15. The employee must use vacation or bonus leave to recover overdue hours. If the employee does not have sufficient vacation or bonus leave to recover all the liability, the remaining liability should be recovered with LWOP. A Leave Admin will need to manually trigger the appropriate recovery of the liability.

Two new subtypes for Infotype 2012 have been created effective 7/1/2015 to allow a Leave Admin to recover overdue hours owed. Subtype ZAWR will recover the hours from the Approved Leave, then LWOP for any remaining liability upon expiration. Subtype ZAWB will recover the hours from Bonus Leave, then LWOP for any remaining liability upon expiration.

<table>
<thead>
<tr>
<th>Additional Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer to the OSC Training website in HELP documents for more information about Adverse Weather.</td>
</tr>
<tr>
<td>Search for the following support document titles:</td>
</tr>
<tr>
<td>• Recovering Adverse Weather Owed job aid</td>
</tr>
</tbody>
</table>

EXERCISE 5.2: Display an Employee’s 2012s

<table>
<thead>
<tr>
<th>SCENARIO</th>
</tr>
</thead>
<tbody>
<tr>
<td>You will review employee Rita Henry’s list of time transfer specifications (IT2012).</td>
</tr>
</tbody>
</table>

Instructions

1. Enter transaction code **PA61** in the Command field and click the **Enter** button or press **Enter**.
2. Complete the following fields:

<table>
<thead>
<tr>
<th>Personnel number</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee - Rita Henry</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Infotype</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subtype</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZAWB – Makeup Adverse Weather f/Bonus</td>
<td></td>
</tr>
</tbody>
</table>

*Make sure to select the all button for the Period*

**NOTE:** This subtype is used to recover Adverse Weather liability from Bonus Leave, then LWOP, if needed.

3. Click the **Overview** button to access the List Time Transfer Specifications (2012) screen.

    - Select **All** for the **Period** before clicking the Overview button.

4. Click on the record to highlight it.

5. Click on the **Change** button. The Change Time Transfer Specifications infotype is displayed.

6. Review the displayed validity dates for the Time Transfer Type field setting.

7. Click the **Back** button until you return to the SAP EASY Access screen.

This exercise is complete.
**Knowledge Check**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. True or False – Time Evaluation occurs automatically during a nightly batch run.</td>
<td></td>
</tr>
<tr>
<td>2. Which of the following is correct?</td>
<td></td>
</tr>
<tr>
<td>A. Time Evaluation does not affect leave accrual</td>
<td></td>
</tr>
<tr>
<td>B. Time Evaluation is run by every Time Administrator</td>
<td></td>
</tr>
<tr>
<td>C. Leave Administrators must calculate and enter quota balances after reviewing Time Evaluation reports</td>
<td></td>
</tr>
<tr>
<td>D. None of the above</td>
<td></td>
</tr>
</tbody>
</table>

**Summary**

In this lesson, you learned to:

- Describe time evaluation
- View common time evaluation error messages
- Describe 2012s
Lesson 6: Reporting and Troubleshooting

Objectives

- Perform time reporting in the Integrated HR/Payroll System
- Perform time troubleshooting

About Troubleshooting

**PRACTICE**

This lesson is designed to introduce troubleshooting. After class, be sure to practice and explore.

**BE PATIENT**

Troubleshooting is a skill that is honed over time – don’t be alarmed if you don’t feel like an expert at the end of class.

**IT GETS EASIER**

As you become more familiar with the Integrated HR/Payroll System’s data, processes, and transactions, your comfort with troubleshooting will increase.

**DON’T WORRY**

The transactions discussed in this topic are displays and reports. They don’t update or change data so running them will not “hurt” anything.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

**EXERCISE 6.1: Display Working Times**

**SCENARIO**

You want to view a report showing a group of employees recorded working times.

Examine the following:

- Sorting
- Filters
- Subtotals
Instructions

**TIP:** Click the Multiple Selection button to enter more than one Personnel Number.

<table>
<thead>
<tr>
<th>PERNR #: Tomeka Avans FT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  80000430</td>
</tr>
<tr>
<td>2  80000431</td>
</tr>
<tr>
<td>3  80000432</td>
</tr>
<tr>
<td>4  80000433</td>
</tr>
<tr>
<td>5  80000434</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERNR #: Sarah Beckham PT/Positive/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  80000410</td>
</tr>
<tr>
<td>2  80000411</td>
</tr>
<tr>
<td>3  80000412</td>
</tr>
<tr>
<td>4  80000413</td>
</tr>
<tr>
<td>5  80000414</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERNR #: Sharon Fairbank FT/Negative/Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  80000490</td>
</tr>
<tr>
<td>2  80000491</td>
</tr>
<tr>
<td>3  80000492</td>
</tr>
<tr>
<td>4  80000493</td>
</tr>
<tr>
<td>5  80000494</td>
</tr>
</tbody>
</table>
1. Enter transaction code CATS_DA in the Command field and click the Enter button or press Enter.

2. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reporting period</strong></td>
<td>All Employees – use current month</td>
</tr>
<tr>
<td></td>
<td>For Ken Potter (Personnel Number 10000042)</td>
</tr>
<tr>
<td></td>
<td><em>(Instructor use only)</em></td>
</tr>
<tr>
<td></td>
<td>01/23/17 – 02/19/17</td>
</tr>
<tr>
<td></td>
<td>02/20/17 – 03/19/17</td>
</tr>
<tr>
<td></td>
<td>03/20/17 – 04/16/17</td>
</tr>
<tr>
<td><strong>Personnel number</strong></td>
<td>Employees Tomeka Avans, Sarah Beckham, Sharon Fairbank, Rita Henry, and Wanda Hill from your employee sheet.</td>
</tr>
<tr>
<td></td>
<td>☑ NOTE: Click the Multiple Selection button to enter more than one Personnel Number.</td>
</tr>
</tbody>
</table>
3. Click the **Copy** button.

4. Click the **Execute** button on the Display Working Times screen to generate the report.

5. Review the displayed data. There will be a section for each employee entered showing **Employee Name**, **Pers. No.**, **Date worked**, **Status**, and **Number of hours, A/A type**...

6. Click the **Additional Functions** button TWICE to expand the view to include **Sort**, **Filter**, and **Subtotals** buttons.

7. Follow your instructor for use of **Sorting**, **Filtering**, and **Subtotals**.

8. Click the **Back** button to return to the SAP Easy Access screen.

Your exercise is complete.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

**Troubleshooting Premium Pay Issues**

- **Time Statement (ZNCTIME)** – Check employee’s time statement to see if a leave offset was made.

- **Display Working Times (CATS_DA)** – Check for leave in same period which can result in an offset.

- **Substitution (PA61)** – Check to see if a substitution shows in their work schedule.

- **Cumulated Time Evaluation Results: Time Balances/Wage Types (PT_BAL00)** – Check Time Wage Types and Balances

- **Display Time Evaluation Results (PT66)** – Day by day account on how time is processed. Link between time and payroll.

---

**Information**

*If these troubleshooting techniques do not help resolve the issue, contact the BEST Shared Services Time team.*

---

**Information**

*The BOBJ Report BO083-Position Eligibility Settings offers another way to view the settings on a position.*
Additional Resources

Refer to the OSC Training website in HELP documents for more information about reporting and troubleshooting.

Search for the following support document titles:

- Time Statement ZNC Time Job Aid
- CATS_DA Display Working Time BPP
- PA61 Change Working Schedule BPP
- PT66 View Time Evaluation Results BPP
- Time Learning Lab 2012 Job Aid
- Time Learning Lab 2013 Job Aid

Work Schedule Errors and Implications

<table>
<thead>
<tr>
<th>Error</th>
<th>Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee listed incorrectly on days instead of evenings or nights</td>
<td>Hours entered will not receive premium pay.</td>
</tr>
<tr>
<td>Employee scheduled for 5x8s instead of 4x10s.</td>
<td>Employee will be unable to record a full day’s absence when recording leave.</td>
</tr>
</tbody>
</table>
**Time Settings Errors and Implications**

Position Settings are managed by the HR Master Data Maintainer

<table>
<thead>
<tr>
<th>Error</th>
<th>Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee didn’t receive premium pay</td>
<td>Position not flagged as eligible, or improper work schedule assignment, or time not properly coded.</td>
</tr>
<tr>
<td>Employee didn’t receive Callback pay</td>
<td>Position not flagged as eligible or improper time code.</td>
</tr>
<tr>
<td>Employee didn’t receive Comp Time</td>
<td>Position not flagged as eligible. Leave time can have offset additional hours worked. Extra time used to repay liability (i.e., Adverse Weather). Time not approved by supervisor.</td>
</tr>
</tbody>
</table>

**A/A Code Errors and Implications**

<table>
<thead>
<tr>
<th>Error</th>
<th>Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>A code is entered that is invalid</td>
<td>System will require that the entry be corrected or deleted before proceeding.</td>
</tr>
<tr>
<td>A premium code is entered and the employee isn’t eligible</td>
<td>If premium codes are used and the employee is not eligible, Time Evaluation will ignore the premium code.</td>
</tr>
<tr>
<td>An A/A code is used and the employee isn’t eligible</td>
<td>If the Callback code is entered and the employee isn’t eligible the employee will not receive Callback compensation.</td>
</tr>
</tbody>
</table>
Premium Code Errors and Implications

<table>
<thead>
<tr>
<th>Error</th>
<th>Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee coded for premium when not eligible</td>
<td>Employee will not receive premium pay UNLESS the Position they hold is eligible.</td>
</tr>
<tr>
<td>Employee is substituted and still enters a premium code</td>
<td>Premium will not double up, it is an either/or, not an additive behavior.</td>
</tr>
</tbody>
</table>

**Summary**

In this lesson, you learned to:

- Perform time reporting in the Integrated HR/Payroll System
- Perform time troubleshooting
Lesson 7: Course Review

Course Objectives

- Describe Time Administration process
- Describe time Roles and Responsibilities
  - Time Administrators vs. ESS
- Define new time recording terms and concepts
- Describe how work schedules can affect quotas and pay
- Identify new time codes using the Time Administration Quick Reference Guide
- Review work schedules
- Describe premium pay eligibility
- Record, review, and correct time in the Integrated HR/Payroll System
- Describe system behaviors
- View common time evaluation error messages
- Perform general time reporting and troubleshooting

Next Steps

- Monitor the Integrated HR/Payroll System communication
  - BEST Shared Services web site
    - URL: https://www.osc.nc.gov/state-employees/BEST
  - Review conceptual materials
  - Access the Training HELP site
    - URL: https://www.osc.nc.gov/state-agency-resources/training/training_help_documents
  - Practice what you’ve learned
    - URL: https://mybeacon.its.state.nc.us/irj/portal
      - Use your current NCID user name and password
      - Client 899
- Keep your training materials close by as a ready reference.
Want to practice what you have learned from your desk?

Follow the link provided above to access the training client on the Integrated HR/Payroll System portal. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed online through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your competency assessment and your evaluation of today’s class in the Learning Management System (LMS).

CONGRATULATIONS!

You’ve completed the course!