

OnePurdue BPR Session Time Management

Session TM2 – Quotas (Leaves)

Session TM3 – Time Evaluation

Workshop Agenda

Topics of Discussion

Introductions, Agenda, Workshop Objectives

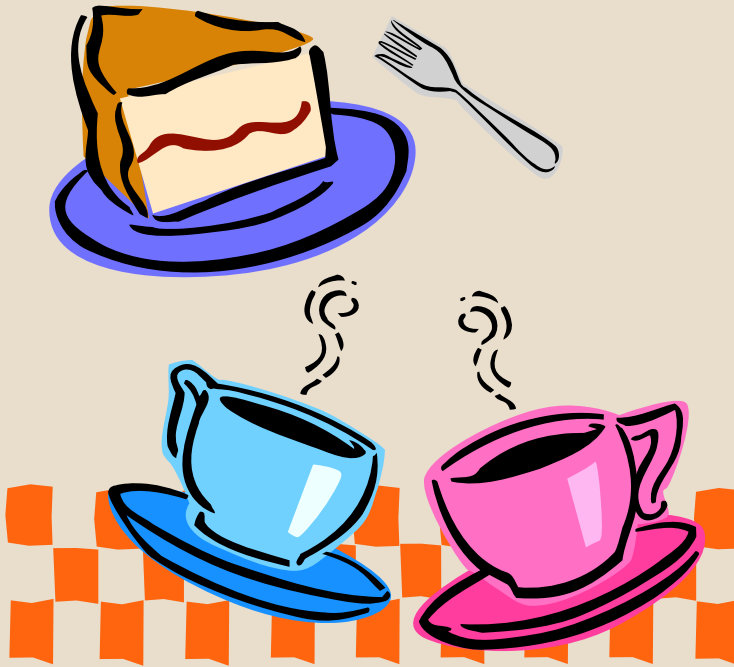
Parking Lot Issues

Next Steps



Workshop Logistics

- Tent Cards
- Rest Rooms
- Breaks
- Parking Lot

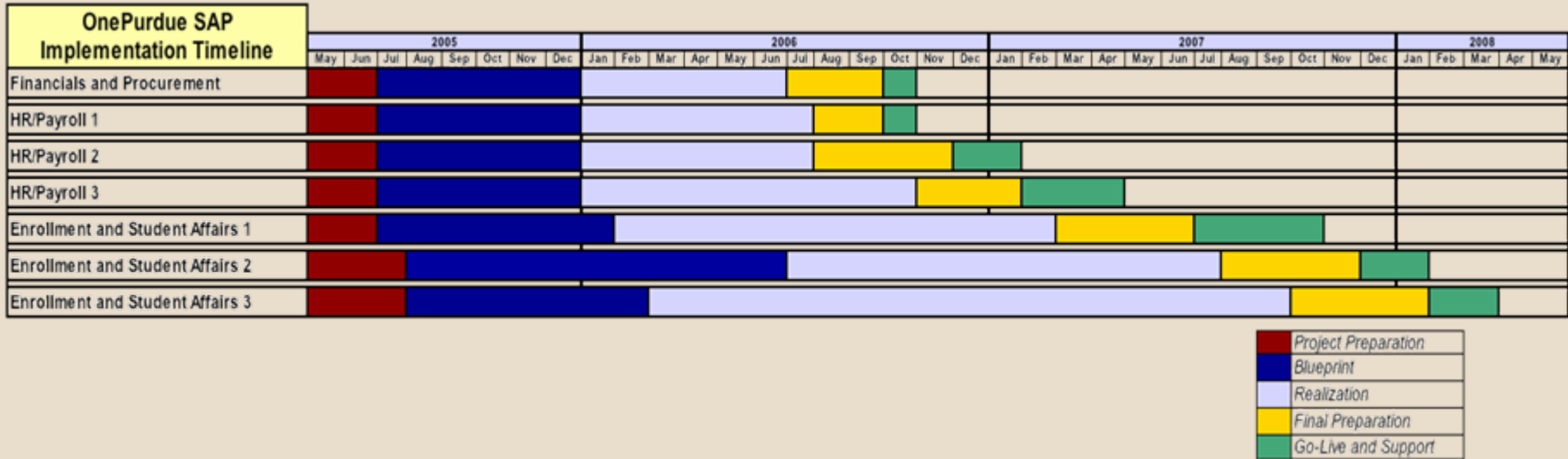


Introductions

- Name
- Functional-process expertise
- One item you would like to see changed because of the OnePurdue project



What Is the OnePurdue Project Timeline?



Finance and Procurement: Accounts Payable, Accounts Receivable, Work-Effort Reporting, Purchasing

HR/Payroll 1: e-Recruitment

HR/Payroll 2: Organizational Management, Personnel Administration, Payroll, Benefits, Time Entry and Evaluation, ESS, Workflow

HR/Payroll 3: Personnel Development, Open Enrollment, Year-End Payroll Processing

Enrollment and Student Affairs 1: Student Recruitment, Admissions, PFAE/ADMS, Transfer Articulation and Equivalency Rules

Enrollment and Student Affairs 2: Financial Aid

Enrollment and Student Affairs 3: Course Catalog, Student Master, Academic History, Grading, Degree Audit, Graduation, Student Accounting Master Data, Cashiering, Account Management, Billing, Payment Plans, Classroom Scheduling, Registration, Academic Calendar, Academic Progression

Workshop Ground Rules

- Respect Time
- Respect Process
 - Stick to agenda topics.
 - One subject discussed at a time.
- Respect One Another
 - One conversation at a time.
 - Cell phones and Blackberrys turned off.
 - Listen.
- Stretch
- Keep the end in sight
- Work to gain consensus on terminology
- Silence means agreement
- Issues will be parked and resolved outside the meeting
 - **Beat It To Death**



OnePurdue BPR Methodology

- Discover
 - SAP terminology, definitions and capabilities.
 - Specific opportunities for Business Transformation
 - Best Practices in the context of the SAP implementation
 - Document process and system gaps
- Validate
 - “To-Be” Business Process
 - Required policy changes
 - Core process owners and advisory committee
 - University leadership
- Communication
 - Present the future state of Purdue University
 - Identify integration points for People, Process and Technology

BPR Deliverables

- Business Process Review Report
- To-Be Design Flowcharts
- Gap Analysis Report
- Functional Specifications Report

Key Performance Indicators

Time Management

- 100% Elimination of duplicate documentation (time slips, time cards)
- Reduce # of approvers/auditors
- 100% Accuracy of paid leaves
- 100% Automatic entry of time & cost center
- Account for both paid & unpaid time
- Calculate accrual on all leaves – all staff

KPI's - Continued

- 100% Automatic calculation of time worked (all departments, all staff, all time worked & not worked – i.e. jury duty, etc.)
- Real time view of leave (accrued, used, and balances)
- 100% Recording all leaves (faculty and staff)

KPIs described here are indicative of general objectives. During the Blueprint process, we will consider end-to-end processes in developing specific metrics associated with these metrics.

Agenda Topics

- Time Management Overview
- Sick Leave
- Vacation
- Personal Holiday
- Personal Business
- FMLA Workbench
- Time Evaluation

Time Management

Enables flexible representation of all personnel procedures involved in recording and evaluating employee time data

Work Schedules and Calendars

Time Data Collection

Recording of Attendance and Absences

Annual Vacation and Sick Leave Accrual

Time Evaluation and Overtime Wage-type generation

Time Management Status

Negative Pay Employees (Salary - Monthly)

- Paid according to their work schedule
- Only record exceptions (Sick, Vacation)

Positive Pay Employees (Hourly – Bi-weekly)

- Paid for hours recorded
- All hours worked and exceptions are recorded

Quotas (Leaves)

Quota Types


‘Quotas’ are balances of available paid time off

- Sick Leave
- Vacation
- Personal Holiday
- Personal Business

The Absence Quotas Infotype (2006)

- This infotype is used to manage leave balances
- There is an entry created for each quota
- Concurrent employment will result in multiple leave balances.



IT 2006 List Absence Quotas

Person ID Pers.Assgn 

Personnel No Name

EE group Clerical Staff Personnel ar West Lafayette



WS rule Non Exempt Status

 Choose  To STy.

Absence Quotas

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
01/01/2005	12/31/2005	01	Sick Leave for Bi-Weekly	01/01/2005	12/31/2005	11.04000	0.00000
01/01/2005	12/31/9999	02	Personal Holiday	01/01/2005	12/31/9999	8.00000	0.00000
01/01/2005	12/31/2005	05	Purdue Vac for Bi-Weekly	01/01/2005	12/31/2005	11.04000	6.00000

View of Quota (Leave) Balances

Person ID: 45 Pers.Assgn: 00000045 West Lafayette Regul...  

Name: Time Quota

Personnel area: Z005 West Lafayette

EE subgroup: Z3 Nonexempt WS rule: NONEXEMP Non Exe...

Selection dates Absence quotas Accrual information Attendance quotas

Totals row	AbQuotaTyp	Quota text	Unit	Entitl.	Rem.	Requested	Compens.
Σ	01	Sick Leave for Bi...	Hours	11.04000	11.04000	0.00000	0.00000
				11.04000	11.04000	0.00000	0.00000
Σ	02	Personal Holiday	Hours	8.00000	8.00000	0.00000	0.00000
				8.00000	8.00000	0.00000	0.00000
Σ	05	Purdue Vac for Bi...	Hours	11.04000	5.04000	6.00000	0.00000
				11.04000	5.04000	6.00000	0.00000

Date	AbsType	Used	Time unit
07/01/2005	VAC	4.00000	Hours
07/02/2005	VAC	2.00000	Hours

View of Quota (Leave) Accrual

Person ID: 45 Pers.Assgn: 00000045 West Lafayette Regul...
 Name: Time Quota
 Personnel area: Z005 West Lafayette
 EE subgroup: Z3 Nonexempt WS rule: NONEXEMP Non Exe...

Selection dates Absence quotas Accrual information Attendance q

Date	A...	Quota text	Unit	Generat...	Transferred	Correct.
01/01/2005	02	Personal Holiday	Hours	8.00000	8.00000	
01/04/2005	01	Sick Leave for Bi-...	Hours	0.46000	0.46000	
01/04/2005	05	Purdue Vac for Bi-...	Hours	0.46000	0.46000	
01/05/2005	01	Sick Leave for Bi-...	Hours	0.46000	0.46000	
01/05/2005	05	Purdue Vac for Bi-...	Hours	0.46000	0.46000	
01/10/2005	01	Sick Leave for Bi-...	Hours	0.46000	0.46000	
01/10/2005	05	Purdue Vac for Bi-...	Hours	0.46000	0.46000	
01/11/2005	01	Sick Leave for Bi-...	Hours	0.46000	0.46000	
01/11/2005	05	Purdue Vac for Bi-...	Hours	0.46000	0.46000	
01/12/2005	01	Sick Leave for Bi-...	Hours	0.46000	0.46000	
01/12/2005	05	Purdue Vac for Bi-...	Hours	0.46000	0.46000	
01/18/2005	01	Sick Leave for Bi-...	Hours	0.46000	0.46000	
01/18/2005	05	Purdue Vac for Bi-...	Hours	0.46000	0.46000	

Absence Quota Report

Display Absence Quota Information



Absence quotas

Validity period 01/01/2005 - 12/31/2005

Pers.No.	Name	Quota	Unit	Entitlement	Used	Compensated to key date	Total remain.
45	Time Quota	Sick Leave for Bi-Weekly	Hours	11.04000	0.00000	0.00000	11.04000
45	Time Quota	Personal Holiday	Hours	8.00000	0.00000	0.00000	8.00000
45	Time Quota	Purdue Vac for Bi-Weekly	Hours	11.04000	6.00000	0.00000	5.04000
			Hours	30.08000	6.00000	0.00000	24.08000

ESS Quota View

File Edit View Favorites Tools Help

Quit Help

ESS **Leave Information**

Working Time
 Leave Information
 Benefits
 Payment
 Personal Information

Current Leave Information

Current Leave Balances			
Type	Used	Balance	Use Or Lose
Sick Leave	8.00	56.00	
Vacation	8.00	56.00	0.00
Floating Holiday		24.00	

Leave Activity Report

Date: 01/01/2005 to 12/31/2005
 Leave Type: Vacation

Run Report

Leave Information			
Type	Begin Date	End Date	Hours
VAC	02/14/2005	02/14/2005	8.00
Total:			8.00

Sick Quota for Exempt Employees

Current Policy:

- Employees are eligible for the following maximum allowances of paid sick leave based on length of University employment:
- Employed less than one year: Regular pay for two weeks.
- Employed one year, but less than two years: Regular pay for one month and 75 percent pay for one additional month.
- Employed two years, but less than three years: Regular pay for two months and 75 percent pay for two additional months.
- Employed three years or more: Regular pay for three months and 75 percent pay for three additional months.

Current policy is under review

Sick Quota for Non-Exempt Employees

Current Policy:

Full-time employees earn sick leave at the rate of two normal workweeks per year. Regular employees working less than full-time earn sick leave on a prorated basis. For example, an employee who works half-time will earn half as much sick leave as a full-time employee will. Employees may use up to 10 of their available sick leave days per fiscal year for family illness. Unused sick leave carries forward to the next fiscal year.

Current policy is under review

Sick Quota for Current 40A & 70A Classifications

40A & 70A employees will be grandfathered to match exempt employees.

Vacation Quota for Exempt Staff and Faculty

- Academic-year faculty and staff: Vacation is when classes are not in session. The seven calendar days before the first day of classes each semester and the time between the end of classes and the final date for submitting grades are not vacation.
- Fiscal-year faculty and fiscal-year staff classified as management or professional: These employees earn 22 days of vacation each year. The maximum accrual is 44 days; the employee forfeits vacation beyond 44 days.
- Fiscal-year staff classified as administrative and supervisory, professional assistant, operations assistant, or technical assistant: These employees earn 15 days of vacation during their first year of University employment and 22 days each year of continuous employment thereafter. The maximum accrual is 44 days; the employee forfeits vacation beyond 44 days.
- Fiscal-year Graduate Students will accrue up to 22 days per year. The balance can not be paid upon termination. Use of this balance is at the discretion of the department.

Vacation for 40A & 70A

40A & 70A employees will be grandfathered to match exempt employees

Vacation for Non-Exempt

- Staff employed on a 12-month, full-time basis earn up to 10 paid vacation days during their first year of employment. During each subsequent year of continuous employment, total paid vacation increases by one day until the employee reaches the maximum of 20 days. For example, staff earn 11 days of vacation during their second year of continuous employment, 12 days during the third year, and 13 days during the fourth year.
- Regular staff employed less than full-time earn vacation hours on a prorated basis. For example, an employee working half-time earns vacation at half the rate of a full-time employee.
- Employees may carry forward a maximum of 40 vacation days (320 hours) into the new calendar year with the exceptions of Fire Fighters (448) and 84 Hour Police Officers (336).
- Police officers working an 84 hour pay period will accrue vacation on all hours paid up to 84 per period instead of 80.

Personal Holiday

The employee earns one personal holiday each fiscal year. The holiday doesn't carry forward to the new year; the employee forfeits the holiday if he or she does not use it before the end of the fiscal year.

Personal Business

Three personal business days are available each fiscal year to allow the employee to attend to financial or legal matters, critical family responsibilities, and other circumstances requiring the employee's presence during regular working hours. Guidelines outlining the appropriate use of personal business days and the approval process for this leave are outlined in EXECUTIVE MEMORANDUM NO. C-46.

Family Medical Leave Act

FMLA

- SAP delivers a process called FMLA Workbench
- FMLA Workbench uses standard FMLA rules to determine eligibility

FMLA Rules

Change View "FMLA Rules": Details

New Entries [Icons] Delimit

Dialog Structure

- FMLA Rules
 - Assignment of FMLA

PS Grouping: 01
FMLA Rule: 001 | Federal FMLA

Periods

	Start	End
>	01/01/1990	12/31/9999

Entitlement

Entitlement: 12.00 Weeks

Deduction Interval

Calendar Year
 Other Period [] []
 Relative to Date [] []
 Starting on First Day of Request
 Rolling Length of Interval: 12 Months

Eligibility Check

Length of Service

At Least: 12 Months
Calculation Proc.: 1SVY Seniority




Working Hours

At Least: 1,250.00 Hours
in the Last: 12 Months

Calculated from Planned Hours
 Calculated from Hours Worked
Day Balance: ZFML fmla balance check

FMLA Reasons

Display View "FMLA Reasons": Overview

Expand <-> Collapse   

FMLA Reasons			
Reas...	Text	Start Date	End Date
BIRTH	Birth of a Child	01/01/1990	12/31/9999
FMCAR	Care of Family Member	01/01/1990	12/31/9999
FOST	Foster Care	01/01/1990	12/31/9999
SICK	Serious Illness	01/01/1990	12/31/9999

FMLA Workbench

- Employees still required to complete FMLA request forms
- SAP FMLA Workbench checks for employee eligibility
- Absence codes will be configured as eligible for FMLA
- Record keeping uses leave actions and absence codes to document FMLA occurrence
- Eligibility will have to be manually overridden for the first year.

FMLA Workbench

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Create FMLA Request

🔍 Check Request

Personnel No. Mr Test Guy Salary

FMLA Request
Comment

FMLA Reason

Period

 Valid From to

Continuous
 Intermittent Planned Hours

Medical Certificate Provided Requested on _____

Status

✖ Applicable Rules
Absences

🔍 📄 ✔ Eligibility 🔄 Deduction

✔ 📄

Name of Rule	Elgblty	Service	Creditable Hours	Ent.	Remainder in Weeks	Remainder in Hours	Deduction Period	Conv.
Federal FMLA	✖	001(012)	0.0000(1,250.00)	12.00	12.0000	480.00	Rolling (12 Months)	40.0000

🔍 Details
✕

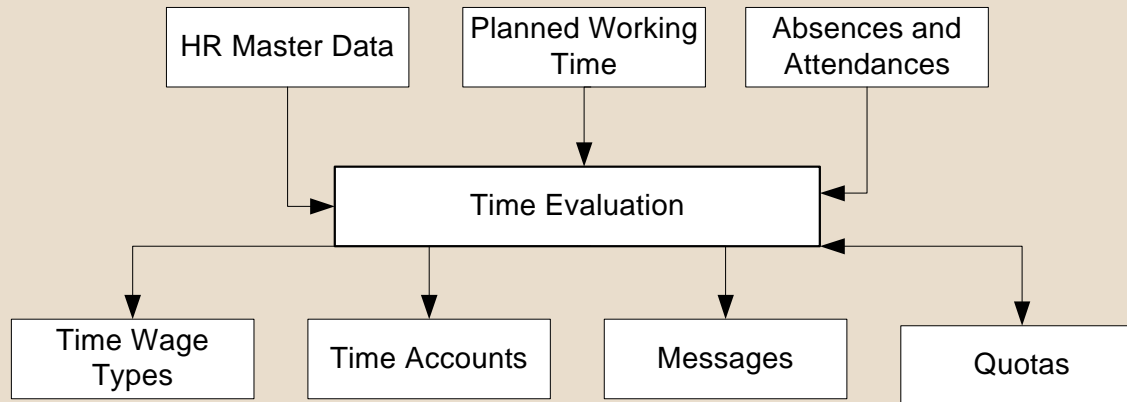
Column	Conts.
FMLA Rule	001
Name of Rule	Federal FMLA
Eligibility	✖
Eligibility	Employee Not Eligible
Length of Service in Months	001(012)
Creditable Hours	0.0000(1,250.00)
FMLA Entitlement in Weeks	12.00
Remainder in Weeks	12.0000
Remainder in Hours	480.00
Deduction Period	Rolling (12 Months)
Week Converter	40.0000
FMLA Request Number	000000000202

Time Evaluation

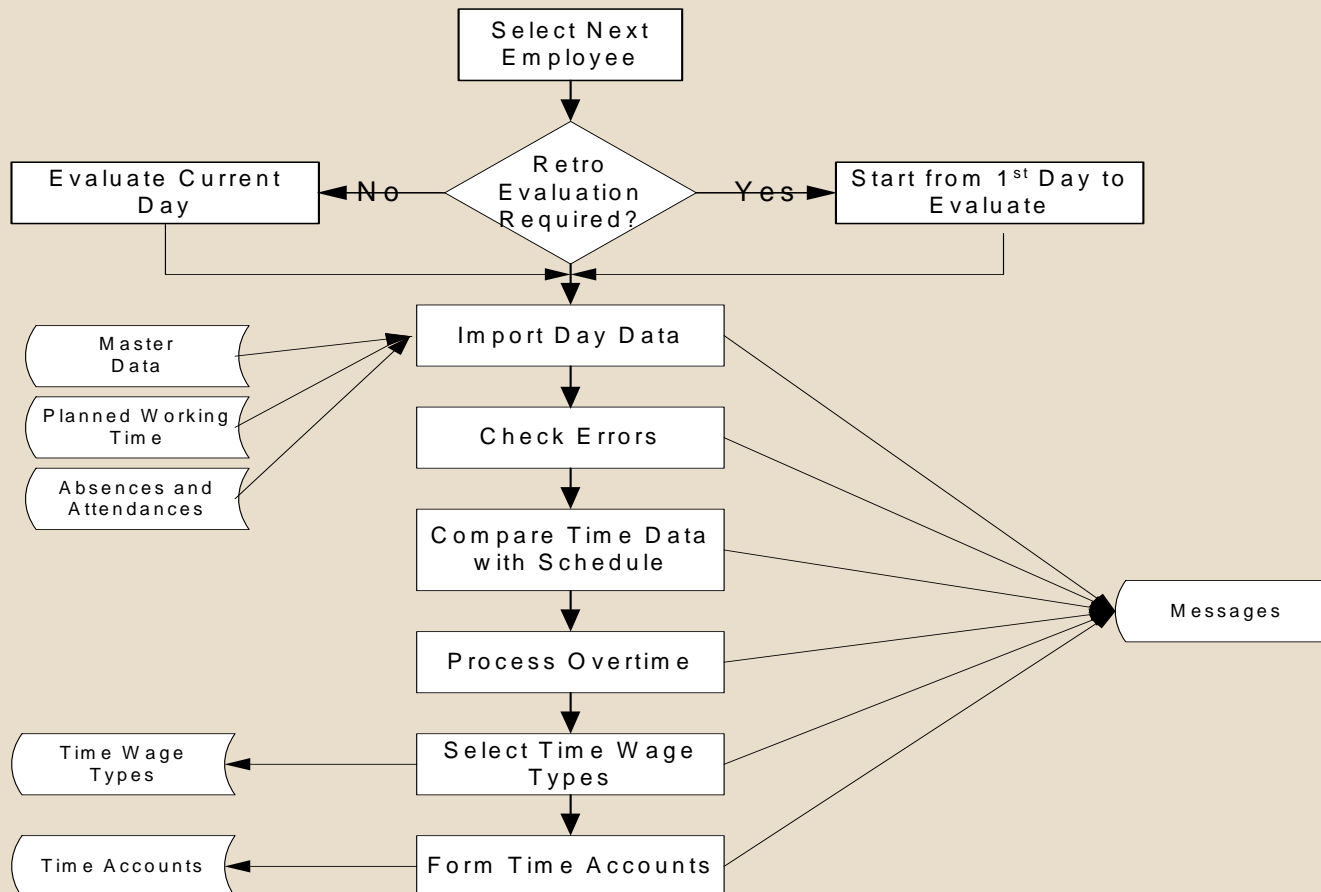
Time Evaluation

- Time Evaluation is the process of reading and processing time data passed by CATS
- During processing, the following are addressed:
 - Recalculation
 - Quotas
 - Overtime
 - Time Type to Wage Type
- The results of Time Evaluation are passed to Payroll to calculate Gross Pay

Time Evaluation



A More Detailed Look



Time Evaluation Recalculation

- Time Evaluation can recalculate time data
- Recalculation is triggered when master data or absence/attendance data is changed
- Initially, the earliest recalculation date will be the Go Live date

Earliest Recalculation Date

Change Payroll Status

Payroll correction

Person ID: 33 Pers.Assgn: 00000033 West Lafayette Regul...
Personnel No: 33 Name: Mr Test Guy Salary
EE group: F Faculty Personnel ar: Z005 West Lafayette
EE subgroup: Z2 12 Month Exempt Status: Active
Chng: 08/31/2005 GFARMER

Payroll/retroactive accounting

Earl.pers. RA date: | Accounted to: |
Run payroll up to: | 07/12/2005
Do not account after: | 07/12/2005 [Bonus Info](#)

Pers.no.locked

Time evaluation

Earl.pers.rec.date: 07/12/2005 Pers.calendar from: 07/12/2005
PDC recalculation: 07/12/2005
 PDC error indicator

Other data

Initial input: 08/11/2005 09:28:52

Earliest Recalculation Date

The Planned Working Time Infotype (0007)

This Infotype contains several key pieces of data used for Time Evaluation

- Work Schedule Rule – How is the employee scheduled to work?
- Time Management Status – Does the employee participate in Time Evaluation?
- Working Week – How is the employee's working week defined?

Overtime

- Overtime is based on pre-defined rules
- Overtime will be calculated by the system based upon hours entered.
- Police dispatcher OT will be manually entered due to the non-standard work week.
- Concurrent employment will result in OT for all hours over 40 across multiple assignments.

Shift Differentials

Shift Differentials can be identified two ways:

- Shift Indicator on Master Data
- Special Attendance Codes reflecting shift

Example of how to define Shift Differential

Display Planned Working Time

Work schedule

Person ID: 20 Pers.Assgn: 00000022 Calumet Regular PT ...

Personnel No: 22 Name: Mr Time Hourly1

EE group: C Clerical Staff Personnel ar: Z001 Calumet

EE subgroup: Z3 Nonexempt Status: Active

Start: 07/01/2005 To: 12/31/9999 Chg.: 08/22/2005 EHERRON

Work schedule rule

Work schedule rule: NONEXEMP Non Exempt

Time Mgmt status: 1 - Time evaluation of actual times

Working week: Monday to Sunday-Purdue Stnd

Part-time employee Additional time ID: 02

Working time

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00
Weekly workdays	5.00

Shift Indicator

Time Type to Wage Type

- During Time Evaluation, a Time Type (Absence/Attendance) is transformed to a Wage Type
- Absence type 'SICK' -> Wage Type 'SICK'
- Attendance type ATTN -> Regular or Overtime
- The wage types are used by Payroll to calculate employee compensation

Miscellaneous Time Activities

- Create Unpaid Absence for Faculty at end of Spring Semester
- Create Unpaid Absence for Employees with status of STD/LTD
- Track Hours of Work for Temporary Employees
- Create warning message if employee exceeds 80 hours of holiday pay in a year

Time Wage Types

Time wage types

Data select. period 01/01/2005 - 12/31/2005

Pers.No.	Name	Period	Current Date	WT	Long text	€	No.
22	Mr Time Hourly1	200508	08/08/2005	1005	Regular hours	12.00	
22	Mr Time Hourly1	200508	08/09/2005	1005	Regular hours	12.00	
22	Mr Time Hourly1	200508	08/10/2005	1005	Regular hours	12.00	
22	Mr Time Hourly1	200508	08/11/2005	1005	Regular hours	4.00	
22	Mr Time Hourly1	200508	08/11/2005	1100	Overtime paid 1.5	8.00	
22	Mr Time Hourly1	200508	08/12/2005	1100	Overtime paid 1.5	12.00	
22	Mr Time Hourly1	200508	08/13/2005	1100	Overtime paid 1.5	12.00	
22	Mr Time Hourly1	200508	08/15/2005	1005	Regular hours	8.00	
22	Mr Time Hourly1	200508	08/15/2005	1005	Regular hours	6.00	
						86.00	

Time Statement

Individual results											
Day	Text	ITer	OTer	Start	End	rec.	P1nd	Skel.	Flex	OTime	DWS
08	Mo			08:00	20:00	12.00					
	Attendance Hours						12.00	0.00	12.00-	0.00	12HR
	Regular hours					12.00					
09	Tu			08:00	20:00	12.00					
	Attendance Hours						12.00	0.00	12.00-	0.00	12HR
	Regular hours					12.00					
10	We			08:00	20:00	12.00					
	Attendance Hours						12.00	0.00	12.00-	0.00	12HR
	Regular hours					12.00					
11	Th			08:00	20:00	12.00					
	Attendance Hours						12.00	0.00	12.00-	0.00	12HR
	Regular hours					4.00					
	Overtime paid 1.5					8.00					
12	Fr			08:00	20:00	12.00					
	Attendance Hours						12.00	0.00	12.00-	0.00	12HR
	Overtime paid 1.5					12.00					
13	Sa			08:00	20:00	12.00					
	Attendance Hours						12.00	0.00	12.00-	0.00	12HR
	Overtime paid 1.5					12.00					
Weekly total							72.00	0.00	72.00-	0.00	

Absence quotas			
From	To	Quota	Number
07/01/2005	12/31/2005	03 test	23.00000
07/01/2005	12/31/2005	04 test2	6.00000
07/01/2005	12/31/2005	05 Purdue Vac for Bi-Weekly	1.65000