OnePurdue

HR Concepts of Time and Leave Management

Overview of Time and Leave Management Concepts in SAP

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GENERAL INFORMATION ............................................................................................................................................. 3
TIME AND LEAVE MANAGEMENT - SAP TERMINOLOGY .......................................................................................... 3
POLICIES IMPACTED BY CHANGES IN TIME AND LEAVE MANAGEMENT .......................................................... 4
TIME AND LEAVE MANAGEMENT CONCEPTS OVERVIEW ..................................................................................... 5
  WORK SCHEDULES ........................................................................................................................................................... 6
  ATTENDANCE CODES .......................................................................................................................................................... 6
  ABSENCE CODES ............................................................................................................................................................. 7
  TIME ADMINISTRATOR - PAYROLL CLERK .................................................................................................................... 10
  CATS - CROSS APPLICATION TIME SHEET .................................................................................................................. 11
  TIME TRANSFER ............................................................................................................................................................ 16
  TIME EVALUATION .......................................................................................................................................................... 16
  QUOTAS - LEAVE BALANCES .................................................................................................................................. 18
  QUOTAS IN SAP AND THOSE NOT IN SAP .................................................................................................................. 21
  RETROACTIVE TIME ADJUSTMENTS ............................................................................................................................ 21
  OTHER TIME COLLECTION ........................................................................................................................................... 22
THE TIME AND LEAVE PROCESS OVERVIEW ........................................................................................................ 29
  TIME ADMINISTRATOR ROLE ..................................................................................................................................... 31
  SUPERVISOR ROLE ....................................................................................................................................................... 31
  FMLA LEAVE ADMINISTRATOR ................................................................................................................................. 31
**General Information**

The time and leave component of the SAP system creates a structure that illustrates the following:

- Manages biweekly time collection
- Manages quotas for all staff
- Administers all short term leaves
- Administers Family Medical Leave Workbench

**Time and Leave Management - SAP Terminology**

SAP terms that are used in the time and leave module to describe the activities…

1. Absence Codes-A code used in CATS to identify the type of paid and unpaid non-working times reported.
2. Additional Time ID (Shift Identifier)-A field in the Planned Working Times (IT0007) that indicates if an employee receives a premium on his basic rate of pay due to an evening, night or additional responsibilities (first responder).
3. Attendance Codes-A code used in CATS to identify the type of hours worked.
4. CATS Profile-The user interface that is specified in CATS that determines the data entry process and layout of the time sheet.
5. CATS-Cross Application Time Sheet-The tool used to collect time data.
6. Concurrent Employment-The situation where one individual employee holds multiple assignments/positions across the University at the same time.
7. Cost Distribution-(IT0027)-The cost distribution applied to payroll charges based on percentages for the defined time frame. Most cost distribution changes will be made with changes to the percentages on the screen.
8. Cost Distribution Administrator-Employees that have role security granted that allows them to change the info type 0027 cost distribution screen data.
9. Data Entry Period-The begin and end dates of a payroll cycle for which time data is reported, i.e. pay period.
10. Effective Dates-Generally the valid date that an action or activity begins and ends.
11. Employee Group-A classification of employees, e.g. the legacy 40A/70A staff fall into employee group "O" Operations Assistants.
12. FMLA Workbench-Family Medical Leave Workbench is a set of transactions that assist in the management of time and eligibility of employees requesting time off relevant to the Family Medical Leave Act.
13. Info type-A set of related data elements. (Commonly noted as ITxxxx)
14. Planned Working Times-(IT0007) the screen that contains elements of the employees' work schedule, time management status, shift code, etc.
15. Quotas-The new term for vacation and leave balances.

Only pilot areas at go-live will have employees entering and releasing their own time electronically.
17. Remuneration Statement-A report that replaces the employee's check stub or payroll advice notice.
18. Shared Service Team-The groups of individuals with duties and responsibilities that were once linked to only central Payroll and central Human Relations/Personnel.
19. Time Administrator-The non-supervisory person that is responsible for recording absences and attendances for employees.
20. Time Approval-The approval of an employee's working times by a supervisor or time administrator.
21. Time Data-The hours of attendance, absence and/or cost overrides recorded for employees.
22. Time Entry-The physical recording of hours, absence and attendance code and other data in CATS.
23. Time Evaluation-The processing of time and master data that applies predefined rules and outputs the data to be processed by payroll.
24. Time Management Status-A code that identifies if the employee is a positive recorder (1-records all time worked and absent) or a negative recorder (9-records only exceptions to work schedule, i.e. vacation, sick employee paid time off, etc.)
25. Time Statement-A report available to employee that shows the time wage types transferred to Payroll. Hours, not dollars are displayed on this report.
26. Valuation Basis-A field in the CATS screen to enter a rate override, a requirement identified for Athletics, College of Veterinary Medicine and the Hall of Music.
27. Variant-A way to store and reuse report selection formats that you specify to your own needs.
28. Wages Types in CATS-A field in the CATS screen to enter a numeric code to identify a dollar amount of payment.
29. Work Schedule-The structure of working times. Each employee must have a work schedule. Most biweekly non-exempt employees have a flexible open 7 day-12 hours per day work schedule with the name BWSTAND. Most exempt employees will have the standard default 5 day-8 hours per day work schedule named EXSTAND.

Policies Impacted by changes in Time and Leave Management

Human Resource policy Wage Administration Policies for Clerical/Service Staff and Operations/Technical Assistants (IV.5.8) was revised on March 1, 2006 and superseded Vice President for Business Services or Business Office Memorandum #175. This new policy provides a consistent definition of overtime for all non-exempt employees, except firefighters and police officers. Overtime will apply for hours in pay status exceeding 8 hours a day OR 40 hours a week. Previously, operations and technical assistant staff classifications incurred overtime only after 40 hours per week. The policy is available at URL: http://www.purdue.edu/policies/pages/human_resources/IV_5_8.html.

A potential policy change involves shift differentials which in the OnePurdue system may be paid without the employee being on the shift for greater than 10 days. As of March 1, 2006, the procedure has not been officially updated. The current procedure Pay Rates/Scales University Pay Guidelines and Approval Policy, which requires more than 10 days on the shift, is available at URL: http://www.purdue.edu/hr/BPM/HR_Index/payrasc.htm. The configuration in the OnePurdue system will support this change by using the override attendance codes.
**Time and Leave Management Concepts Overview**

Time and leave management is a joint responsibility of business office staff and shared service team central administrators. Key elements of the process, including time data entry or review, are managed by time administrators and supervisors. Time evaluation processing and auditing is managed by central administrators. Each employee will be linked to a specific time administrator upon employment. It is important to note that employees **must** be hired in the system before time data can be entered, which is a change from our current process.

Time administrators enter time for biweekly employees from an approved paper time card or audit/approve time based upon electronic submission of time data by the employee and supervisor. Benefits-eligible employees will be reporting time worked and paid absences as they do today. In addition, these employees will begin reporting unpaid absences. Biweekly employees are classified as positive pay reporters and are paid based on hours reported through the Cross-Application Time Sheet (CATS), which is OnePurdue’s tool to collect and record time data. Selected pilot areas will have employees entering their own time data directly into CATS, which will be approved by a supervisor. Time administrators will have the capability audit and correct the time in these pilot areas. Upon successful completion of the pilot, additional areas will be able to roll out the CATS application to their employees when practical. CATS entry replaces the current white and yellow time slips. Time can be recorded in CATS on a daily basis, however departments using paper time cards will enter the time data after the time cards are approved and submitted at the end of the payroll period.

Monthly exempt staff are classified as negative pay reporters, which means they are paid based upon their salary and not the actual hours worked. Any exceptions to the schedule are reported for monthly exempt staff through CATS, such as vacation, sick leave, and absence without pay. Selected project managers, designers, and construction staff in Physical Facilities will be recording all of their hours due to the need to recharge their time to work orders and projects. Vacation balances for monthly paid exempt staff will be maintained electronically. Sick quota balances will not be maintained electronically, but the use of sick hours will be recorded in CATS, along with other exceptions. The quotas maintained in OnePurdue will be reported as hours and not days.

The non-exempt West Lafayette Fireman and the Fort Wayne non-exempt Police staff will be paid a biweekly salary. These groups will record their time worked and absences just like any other biweekly employee.

Another conceptual change involves cost distribution for all employees. A priority structure exists to charge the salaries and wages to general ledger accounts. The first stop for cost distribution is the master cost center data identified on Info type 0001. By default, the master cost center equals the distribution on IT0027. IT0027 can be changed for both biweekly and monthly staff, similar to the PAIS mainframe application today. Salaries and wages will be charged based on the cost distribution overrides in CATS. Overrides in CATS supersede info type 0027 and master cost center distribution in info type 0001. Therefore, most cost distribution will not be part of time data entry; rather a separate transaction screen will be initiated to change IT0027 percentages.
Time evaluation is a computerized process that occurs nightly. Warning messages will be generated after this process. These warning messages should be reviewed and the appropriate action taken. For example, a warning message may indicate that the employee has reported more than 10 holidays in the fiscal year. These messages indicate that a correction will need to be made to the employee’s time card. More information is available under the CATS section.

Each regional campus will manage their time data entry similar to the rest of the University. Reporting will be managed decentrally by supervisors, time administrators, and/or business managers. Regional staff will be responsible for ensuring that time administrators enter time data by the appropriate deadlines, just as business managers will at the West Lafayette campus. Cost distribution changes, although not technically a part of time data entry, must also be completed by published payroll deadlines. Audit and error reports should be generated by supervisors or time administrators after time evaluation. Shared service teams will provide oversight to ensure all errors identified in the time evaluation process are corrected.

**Work Schedules**

Work schedules in OnePurdue parallels the current process in several ways in that all employees have work schedules; but, it differs because of the degree of formality required in OnePurdue. Work schedules enable the standard prorating of payments for personnel actions (new hires, promotions, transfers, terminations, etc), which decreases the need for manual calculations. (Firefighters are an exception to this statement.) Permanent schedule changes have to be recorded in OnePurdue to ensure proper payment.

A smart naming convention for each work schedule was attempted using hours worked as part of the logical name. The digits 1-9 represent hours worked and then the letter A=10, B=11, C=12, etc. Most of the schedules created during configuration were for part-time exempt monthly paid staff. For example, a 50% FTE employee working Monday, Tuesday and Wednesday of 2, 8 and 10 hours respectively is on a scheduled named P28A0000. However, most biweekly paid staff will be on a standard 7 day 12 hour shift schedule to accommodate maximum flexibility and functionality without creating the need for infinite schedules. Remember that biweekly non-exempt staffs are positive recorders and get paid for the hours actually worked and reported. Similarly, most monthly paid staff will be on a 5 day (Monday through Friday) 8 hour shift. The biweekly standard is named BWSTAND; and, the monthly standard is EXSTAND.

**Attendance Codes**

Attendance codes in the OnePurdue system are similar to the legacy mainframe codes from the perspective that regular and overtime hours must be reported. Overtime will not be automatically calculated by the OnePurdue system. Attendance type codes collect and classify the hours worked. One difference involves those employees on rotating shift that in legacy payroll had 2 time slips due to applying the shift differential to the base rate of pay. In OnePurdue, override attendance codes, A2, A3 and VTSD will allow shift differentials to be paid without having two different rates of pay. Similarly, overtime can also have override codes that would initiate the shift differential payment, e.g. OT2, OT3, VTso. Several differences were identified involving the use of unit pay. Several of these involved the payment of non-exempt
monthly paid staff, such as physicians, veterinarians and nurses. The attendance code PUSH will pay exempt physicians an extra duty amount of $55/hour based on hours reported in CATS. Similarly, VHCB attendance code translates to $22/hour for exempt veterinary call back. In contrast, the XMHW attendance code will have an automatically calculated hourly rate based on the exempt employee's actual assignment and basic pay. The list of attendance codes follows.

<table>
<thead>
<tr>
<th>Type Code</th>
<th>Attendance Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Attendance Hours-regular hours worked paid at straight time</td>
</tr>
<tr>
<td>A3</td>
<td>3rd Shift Override regular hours</td>
</tr>
<tr>
<td>A2</td>
<td>2nd Shift Override regular hours</td>
</tr>
<tr>
<td>OT</td>
<td>Overtime-1st shift</td>
</tr>
<tr>
<td>OT2</td>
<td>Overtime-2nd Shift Override</td>
</tr>
<tr>
<td>OT3</td>
<td>Overtime-3rd shift Override</td>
</tr>
<tr>
<td>PUSH</td>
<td>Call back or Urgent care coverage for Exempt Physicians (currently $55/hr)</td>
</tr>
<tr>
<td>VTSD</td>
<td>Veterinary Technicians (70A) with unique $2 shift differential occasionally applied</td>
</tr>
<tr>
<td>VHCB</td>
<td>Vet Call Back - $$ (22 currently) per hour call back for 60A Exempt DVM positions</td>
</tr>
<tr>
<td>XMHW</td>
<td>Exempt Employee (e.g. nurses at PUSH) at regular hourly rate</td>
</tr>
<tr>
<td>FN</td>
<td>Fireman inside overtime calculated 40 periods using annual salary divided by 2960 hours</td>
</tr>
<tr>
<td>FO</td>
<td>Fireman outside overtime calculated using annual salary divided by 2080 hours per year</td>
</tr>
<tr>
<td>VTSO</td>
<td>Overtime-Veterinary Technicians (70A) with occasional $2 shift differential applied</td>
</tr>
</tbody>
</table>

**Absence Codes**

This concept parallels the current process in several ways that paid absences must be recorded. Paid sick and vacation hours are reported today for staff with benefits, and they will continue to be recorded in OnePurdue. A difference identified with OnePurdue is the reporting of unpaid absences. Unpaid time **must** be reported for all regular staff with benefits. Unpaid hours will be reported as standard operating procedure to accommodate the Family Medical Leave Act (FMLA) tracking and attendance gathering data. These codes also facilitate the off-line attendance information that many departments and/or supervisors keep manually. Unpaid hours that will be reported for salaried staff will reduce their pay, since they are negative recorders. Unpaid hours that will be reported for hourly staff will have no effect on pay, but it enables the tracking of unpaid time that is a benefit for regular clerical and service staff. Recording unpaid time for students or other staff without benefits is optional.

Today, few absence codes are valid in legacy payroll. In OnePurdue, several more choices are available. As previously mentioned, a code for bereavement leave will be available for regular benefits eligible employees. This policy and amount of hours available must still be manually administered by supervisors and time administrators. Similarly, a paid holiday which requires being in pay status the day before and the day after the official holiday must be administered manually. The OnePurdue system does not automatically apply the University policy.
Increased absence code selection exists in OnePurdue to report paid sick leave. For example, two absence codes, SE and SF will be used in the future. SE represents paid sick leave (quota) used by the employee for their self, while SF is paid sick leave used by the employee for a qualified family member. The same sick quota balance is reduced as the SE and SF codes are recorded. Note that University policy has always limited sick leave for family members. The policy has not changed, but the manner of recording has changed.

Another example involves the scenario for their very infrequent use will be when an employee on rotating shifts that has a shift differential that is NOT part of their master data needs to record paid absence while on the shift with the differential. The SPA2 and SPA3 absence codes are companion codes and must be entered with another paid absence code. These codes result in paying the stated shift differential plus the basic pay rate on the recorded absence hours.

Consistent with manual recording today, temporary staff without benefits will not be eligible to use the paid absence codes that are mapped to benefits, such as vacation or sick days. The system will prohibit the use of the absences attributed to quota and a University paid holiday. The only paid absences available for non-benefits eligible employees are military leave paid (MIPD) and worker's compensation (WC).

The list of absence codes follows.

<table>
<thead>
<tr>
<th>Type Code</th>
<th>Absence Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABUP</td>
<td>Approved UNPAID Time Off</td>
</tr>
<tr>
<td>BV</td>
<td>Bereavement Leave - Paid</td>
</tr>
<tr>
<td>FMUP</td>
<td>FMLA - Unpaid</td>
</tr>
<tr>
<td>FMH</td>
<td>FMLA USING Holiday - Paid</td>
</tr>
<tr>
<td>FMPH</td>
<td>FMLA USING Personal Holiday</td>
</tr>
<tr>
<td>FMPB</td>
<td>FMLA USING Personal Business Days - Paid</td>
</tr>
<tr>
<td>FMSE</td>
<td>FMLA USING Sick Leave - Employee's illness</td>
</tr>
<tr>
<td>FMSF</td>
<td>FMLA USING Sick Leave - Family</td>
</tr>
<tr>
<td>FMV</td>
<td>FMLA USING Vacation</td>
</tr>
<tr>
<td>H</td>
<td>Holiday - Paid</td>
</tr>
<tr>
<td>MALU</td>
<td>Mutually acceptable leave of absence - UNPAID</td>
</tr>
<tr>
<td>MIPD</td>
<td>Military Leave - Paid 15 days</td>
</tr>
<tr>
<td>MIUP</td>
<td>Military Leave - Unpaid</td>
</tr>
<tr>
<td>OL</td>
<td>Other Leave - Paid</td>
</tr>
<tr>
<td>PBD</td>
<td>Personal Business Days - Paid - currently 3 days/fy</td>
</tr>
<tr>
<td>PH</td>
<td>Personal Holiday</td>
</tr>
<tr>
<td>SE</td>
<td>Sick Leave - Employee's illness</td>
</tr>
<tr>
<td>SF</td>
<td>Sick Leave - Family</td>
</tr>
<tr>
<td>UN</td>
<td>Unapproved Absence - Unpaid</td>
</tr>
<tr>
<td>V</td>
<td>Vacation</td>
</tr>
<tr>
<td>WC</td>
<td>Workers Comp - Paid - initial injury, subsq dr visits</td>
</tr>
<tr>
<td>SPA2</td>
<td>Supplement 2nd shift paid absence premium/differential only-use with another paid absence code</td>
</tr>
<tr>
<td>SPA3</td>
<td>Supplement 3rd shift paid absence premium/differential only-use with another paid absence code</td>
</tr>
</tbody>
</table>
CATS time data entry screen showing attendance code "A" and absence codes "SE" and "SF".

CATS time data entry using the "A2" attendance override, and "SE" with "SPA2" override absence codes.
**Time Administrator - Payroll Clerk**

This time administrator concept parallels the current payroll clerk process duties in several ways. First, time cards must be completed by employees and supervisors as in the past. The completed time cards are audited by time administrators for accuracy and correctness. For example, the amount of bereavement leave that an employee is allowed depends upon the relationship and the OnePurdue system will not automatically limit the time entered by the time administrator. Time administrators should prepare a batch or total hours reported for each group, cost center, or division of time cards they enter as a data entry control to be compared to a OnePurdue report later in the process. Overtime hours should also be subtotaled. Blue certification sheets will no longer be required. As shown below, all employees will have a time administrator linked to their master data upon employment.

![Copy Organizational Assignment (0001)](image)

*Info type 0001 which shows the time administrator, D01, linked to PERNR 700.*

Instead of transferring the data from time cards to time slips and submitting to central payroll, the time cards will be entered directly into the Cross-Application Time Sheet (CATS) using the CAT2 transaction. CATS profile selections which control the cost accounting and fields available for data entry are discussed later in this document. Similar data entry deadlines will exist for the biweekly payroll. Since the data entry is decentralized, departments will need to give high priority to the data entry of time data. Managers will need to ensure that the appropriate data entry, review and audit of time data take place to meet the final processing
deadlines that will be communicated by Central Payroll. Managers should also target time data for monthly staff to be entered to meet deadlines published by Central Payroll.

Some pilot areas may have employees performing their own data entry directly into CATS via the employee portal. These pilot areas will have different processing check points based upon selected pilot options.

Time administrators and/or their supervisors will need to perform various audit steps to verify their data entry. Departments should segregate the entry, review and correction duties as feasibly possible. Oversight should be provided so that no one time administrator has total control of reviewing, approving and entering time data from start to finish. Some of the time data activities and specific audit steps identified for the time administrator are as follows:

1) Review time cards for appropriate application of human resource policies.
2) Enter time data using appropriate CATS profile.
3) Advise staff of any changes due to adherence of policy or lack of quota.
4) Calculate total hours recorded, total overtime hours and time card count from time cards. Suggest a calculator tape showing this information.
5) Run Missing Time Report to identify regular employees without 80 hours (if FTE is 100%; 40 hours if 50% FTE) reported.
6) Run Display Working Times Report variant by Employee and verify data entry.
7) Run Display Working Times Report variant by A/A type and compare to manual calculation of total hours, overtime hours and number of cards.
8) Run pre-posting cost distribution (Distribution Change) report.
9) Correct time data entry errors.
10) Enter cost distribution changes.
11) Correct cost distribution data entry errors.
12) Run Time Evaluation Messages Report the following day. (Time evaluation will be run more frequently closer to payroll deadlines.)
13) Review all warnings and correct time data as identified in evaluation warnings, if necessary.
14) Run optional reports as operationally desired:
   • Display Absence Quota Information
   • Cumulated Time Evaluation Results for wage types and shift differentials generated
   • Time Statement
   • Cost Distribution by organizational unit, fund or cost center grouping
15) Run System Suspense and Cost Distribution Report at All Levels AFTER payroll processing posts charges to accounting.
16) Submit cost distribution corrections AFTER payroll postings, if necessary.

**CATS - Cross Application Time Sheet**

The CATS screen is accessed using the CAT2 transaction in OnePurdue. This screen is the repository for all time data. Time data includes attendance and absence codes, hours, and override data such as wage types, rates and cost distribution information. Time administrators must select the appropriate CATS data entry profile. The data entry profile controls the background costing integration, sets default values, limits fields displayed, and defines the
workflow instructions. Most time administrators will enter biweekly time cards using the "TABW" profile. The monthly exempt staff will have their time entered using the "TAMO" profile.

Whenever override cost distribution is required the "TABWCOST" profile will be selected. The "TABWWO" profile has been developed for Physical Facilities to accommodate work order processing. Only physical facilities should utilize this profile because it results in different integrated data being passed to the accounting system.

Athletics, Hall of Music and the Veterinary College have special situations where wage types or rate overrides may be necessary. These special situations require that the "TABWWTRO" profile be used to access the appropriate fields for data entry.

Whenever a time administrator enters their own individual time, the "ITA" profile should be selected. Any other profile name that starts with an "I" will be used with the Employee Self-Service pilots. The current CATS profiles are as follows:

<table>
<thead>
<tr>
<th>PROFILE NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBW</td>
<td>Individual  Biweekly Workflow to Supervisor</td>
</tr>
<tr>
<td>IBWTA</td>
<td>Individual  Biweekly Workflow to Time Administrator</td>
</tr>
<tr>
<td>IBWWO</td>
<td>Individual BW &amp; MO with Work Order Workflow to Supervisor</td>
</tr>
<tr>
<td>IBWWOTA</td>
<td>Individual BW &amp; MO with Work Order Workflow to Time Administrator</td>
</tr>
<tr>
<td>IMO</td>
<td>Individual  Monthly Workflow to Supervisor</td>
</tr>
<tr>
<td>IMOTA</td>
<td>Individual  Monthly Workflow to Time Administrator</td>
</tr>
<tr>
<td>ITA</td>
<td>Individual  Time Admin Self Data Entry</td>
</tr>
<tr>
<td>TABW</td>
<td>Time Admin Biweekly</td>
</tr>
<tr>
<td>TABWCOST</td>
<td>Time Admin Biweekly With Full Costing Fields</td>
</tr>
<tr>
<td>TABWWO</td>
<td>Time Admin BW &amp; MO with Work Order</td>
</tr>
<tr>
<td>TABWWTRO</td>
<td>Time Admin Biweekly with wage types and rate overrides (for Vet/Athletics)</td>
</tr>
<tr>
<td>TAMO</td>
<td>Time Admin Monthly</td>
</tr>
<tr>
<td>TAMOWT</td>
<td>Time Admin Monthly for Vet Farm Calls-Wage Type</td>
</tr>
</tbody>
</table>
Basic CATS time date entry screen.

As previously discussed, several auditing steps are required of the time administrator or their supervisor after the time data entry made into this CATS screen. First, the "zhr_missing_time" transaction should be executed. This "Missing Time Report" takes the FTE % x 80 hours for all regular biweekly paid employees and compares this amount to the total reported hours for each employee. Exceptions are displayed and the time administrator should investigate and correct any errors or omissions. Remember that paid and unpaid time is reported in the OnePurdue CATS screens. Note that the pilot areas with electronic entry by the employee may have time that is not released nor approved that could be causing the exception. Both situations should be corrected before the payroll deadline.

Time administrators will also be required to run transaction "CATS_DA" called "Display Working Times" after the missing time report is corrected. The variants, or report format, to run this report showing totals by employee should be executed by the time administrator. Individual time cards should be reviewed to verify the appropriate attendance/absence code was used along with the correct hours.

Someone other than the data entry time administrator should run/review the transaction "CATS_DA" called "Display Working Times" variant with totals by attendance/absence type. Comparison of the manual calculator tape that shows total hours and total overtime hours with this report variant should be documented by the separate person with initials and date. This segregation of duties enhances the internal controls of the time data collection process. Any changes made to CATS due to the prior audit steps require another CATS_DA transaction to be executed using the first variant. Note that the report can be run for the changed individuals only, if desired. The attendance or second variant of "Display Working Times" report should compared to the manual calculator batch totals.
While time data entry and audit activities are performed, similar activities should be conducted for cost distribution. Cost distribution (Distribution Change) reports for the current period should be run by the time administrator. Alternatively, another staff person with cost distribution administrator security could run these reports. Steps to enter changes make corrections to data entry errors and review of current pay period data should be completed by the same time data entry deadlines published by Central Payroll.

*Screen Shots of selected reports follow:*

*Missing Time report showing one employee on the error list.*
Display Working times: By employee totals variant

Display Working Times: By attendance and absence code variant.
**Time Transfer**

Time Transfer is a new concept. The time transfer process will be scheduled to run at least nightly as an automated processing step. The information from CATS, which contains the cost overrides, attendance, and absence data, must be transferred to Human Resources (Payroll) and to Financial (Plant Maintenance Accounting) before further time evaluation and plant maintenance processing occurs. Time transfer will be a central office function. Time administrators will not be responsible for this time transfer processing; but, they must adhere to Central Payroll data entry deadlines as previously discussed.

**Time Evaluation**

Time Evaluation ensures that the time data recorded in CATS meets the University's defined rules, updates quota balances, and creates wage types for payroll processing. The execution of the time evaluation process is another central office function that will be automatically scheduled at least nightly. These time evaluation results are then read by Payroll for processing pay. Time Evaluation results in error or warning messages that should be corrected before further processing by payroll. Shared service teams and central time and payroll staff will address errors. Time administrators and their supervisors will address warnings as previously discussed in the CATS section of this document. Warnings will generally require corrections to time data; but, there might be a few situations where the warning does not require a change, i.e. police officers working greater than 80 hours a pay period. An example where a warning message will require correction in CATS is the indicator that an employee has taken more than 10 holidays in the fiscal year.

An audit step performed by time administrators will be the review of error messages after time evaluation is run. (Note that the display working times report shows the CATS data entry before any actual "evaluation" takes place.) Time evaluation runs nightly and produces warning messages. The transaction "PT_ERL00" to produce the "Time Evaluation Messages" should be executed the morning after data entry is completed. All warning messages should be reviewed and errors corrected if needed. For example, a warning message might indicate the employee has more than 40 hours of attendance in a week. If this is the case, then there should be overtime reported. Time administrators or their supervisors need to investigate these situations. Lastly, the Time Evaluation Messages" report should be re-run the next morning or whenever time evaluation is processed again to verify no additional warnings, as a result of changes made to time data.

An optional report to run after Time Evaluation is processed is the "Cumulated Time Evaluation Results: Time Balances/Wage Types". This report shows the actual wage types that have been generated by the time evaluation process. Areas with staff working on rotating shifts or receiving occasional shift differentials may be curious as to the actual application of these differentials, and this report allows viewing of this processed data. These wage types are passed to payroll for final processing.
Time Evaluation Messages:

Employee with Personnel Number (PERNR) 289 worked more than 8 hours in a day.
Employee with PERNR 302 has reported more than 40 regular hours per week.
Employee with PERNR 700 has reported more than 10 holiday occurrences.
Employee with PERNR 700 has also taken more than 10 days of sick leave for the family.

Optional report of cumulated time evaluation results: Note that areas without employees working shifts may not need to see this report. However, areas with staff on rotating shift schedules will have more interest in this report.
**Quotas - Leave Balances**

This concept parallels the current process in several ways. The sick and vacation leave that employees earn by working now has the generic name "QUOTA". Policies that dictate quota earnings (accruals, entitlements may be terms also used here) based on years of service, staff classification, and hours worked are not changing. The method of reporting the use of these quotas is changing.

The following quota types and descriptions have been identified:

Exempt (including legacy 40/70A employees)
- 01 Sick (used for tracking purposes only)
- 02 Vacation
- 03 Personal Business Days

Non-Exempt Employees
- 01 Sick
- 02 Vacation
- 04 Personal Holiday

The CATS time sheet will be used to report time off for short term occurrences using absence codes for BOTH biweekly paid and monthly paid staff. Biweekly employees are referred to as positive recorders. These non-exempt employees are paid only for the hours they record. Monthly exempt employees are classified as negative recorders and report only exception time, such as vacation or sick. Monthly exempt are paid their salary regardless without reporting worked hours. These exempt staff will be reporting usage of quotas in hours, but their supervisor must ensure that the hours reported represent no less than half a day due to University policy and the Fair Labor Standards Act requirements. Policy Memorandum C-46 will be updated for exempt employees (and the non-exempt professional 40A/70A) to reflect a prorating change. Exempt employees in pay status less than 15 calendar days will have vacation prorated to "half" of the monthly accrual and not the nearest half day.

Non-exempt, positive recorders must report paid time off reported in the current payroll cycle to result in proper payment. Non-exempt staff will continue to use and report their vacation and sick leave in the same increments as they use today. Negative recorders, exempt employees, will be paid their salary without the paid time off being reported; but, the hours that comprise the exempt employee's half day or day of scheduled vacation, sick quota, or personal business should be reported monthly.

On-line checks or edits of usage will become a standard practice by many employees using the Employee Self Service portal. Quota information will also be available to the individual employee on their check stub or time statement. Many of the OnePurdue screens and transactions involving quotas may refer to the amount your earn (accrual) as entitlement. Beware of the values in entitlement columns because they may be misleading. Configuration rules establish entitlement values based on balances at different time of the year, depending upon policy. The entitlement values may be misleading if the history of the quota is not taken into account.
Personal holiday and personal business days will be separate quotas for the different employee groups based on current policy. The CATS time sheet will not allow these quotas to go into a negative status. So, time administrators (payroll clerks) will no longer need to review a paper leave report to see if sick or vacation quota is available for a biweekly employee. However, the system cannot prohibit improper partial use of quotas, as in the case where most supervisors and/or departments require using all 8 hours of personal holiday versus splitting it up into smaller hourly increments. The use of these hours still requires supervisor approval and manual intervention to adhere to policy and procedures. One change for personal holiday involves the timing of the accrual. In Legacy payroll, personal holiday must be used by the last working day of the last pay period in the fiscal year. In OnePurdue, this quota will be available July 1 through June 30th. The personal holiday quota will not be available until the 90 day probationary period has passed; the personal business day quota will be available upon the first day of employment. The personal holiday quota will continue to be forfeited if not used by the end of the fiscal year.

Quota corrections or leave adjustments may still be needed for recording errors prior to balance conversions identified after go-live implementation. Also, as an employee with concurrent employment terminates one of their assignments quota corrections may be required to move the accumulated quota balances to the primary position. Quota corrections should be submitted to the Shared Service Teams or Central Payroll for data entry. Time administrators will continue to obtain employee identification information, change request data to increase, reduce or replace, the reason for the correction, and approval.

Examples of the Display Absence Quota Report and Create Quota Correction screens follow. The Absence Quota Report takes the place of the legacy Leave Report for biweekly staff. Note that the column on the far right side with the header "Total remain" is the balance that is currently available to the employee. Time administrators will be able to request this report online for one or an entire cost center. This information will be available to individual employee using the Employee Self-Service portal. The Create Quota Corrections screen will be used by the Shared Service Team or Central Payroll to correct quotas as necessary.
Display Absence Quota Information screen with balance or "total remaining" at right hand margin.

Create Quota Correction screen to be used by Shared Service Team or Central Payroll for data entry of quota adjustments.
**Quotas in SAP and Those not in SAP**

The concept that hourly biweekly quotas are available in the legacy payroll system and that the quotas for monthly exempt are kept manually off-line is not a foreign concept. There are some wrinkles with on-line quota balances maintained with OnePurdue as discussed below.

First, vacation quota earnings for all eligible staff groups will be maintained on-line. Usage recorded on-line and the total remaining (balances) will be valid. Personal Holiday and Personal Business Day quotas will also be maintained on-line in OnePurdue. Vacation and personal business will no longer need to be maintained off-line, since those exception hours will be reported in CATS.

Today, the unpaid leave quota is not kept electronically today for any staff group. In OnePurdue there will not be a quota for the unpaid leave; however, the system will be the repository of usage of **unpaid** absences. Therefore, unpaid absences for both exempt and non-exempt employees who are regular benefits eligible staff must be reported in CATS.

The sick quota for biweekly non-exempt (excluding the non-exempt professional, technical and/or operation assistants) will be maintained on-line in OnePurdue. Earnings/entitlements, usage and balances will be accurate. Note that the accrual or earnings is based on actual hours worked and absence hours in pay status.

Since the sick leave policy for exempt staff (and non-exempt professional, technical and/or operations assistants) is not changing. The current policy CANNOT be configured/programmed in OnePurdue. Instead, the OnePurdue system will be used as a repository of the usage. Sick quota usage should be recorded in CATS for exempt and non-exempt employees. Employees, especially time administrators, should be aware that any query of sick leave quota "BALANCE" is not accurate because invalid earnings/entitlements will be posted monthly so that staff may record the maximum sick quota allowable. Sick quota balances should still be maintained off-line for these employee groups.

Graduate student sick quota balances will be the only quota allowed to go negative in OnePurdue. The system should be used as a repository of the usage which means sick leave should be reported and recorded in CATS for these employees. The difference regarding the graduate student sick quota is that it will be allowed to go negative. No OnePurdue system controls are configured to enforce the 10 days per fiscal year policy. Since it will be allowed to result in a negative balance, time administrators and the employees' supervisors should ensure University policy adherence.

**Retroactive time adjustments**

This concept parallels the current process in that some payroll errors cross over several pay periods and corrections are needed. For example, today, biweekly staff that have had an error on their rate of pay will prepare a payroll change and a one-time only yellow time slip with the hours to pay at the DIFFERENCE in the rate. In OnePurdue, a personnel action will only need to be prepared with an effective date. Payroll will automatically go back to that effective date and apply the new rate and automatically calculate the difference in pay.
In the event that an incorrect attendance/absence code was used in a previous pay period, the code and hours can be corrected directly in CATS. The subsequent time evaluation and payroll processing will affect pay corrections and quota balances. Controls will be placed in the CATS time sheet limiting the number pay periods that a time administrator can change (in both directions-forward and back). Payroll controls the retroactive time frame with IT0003. This infotype is known as Payroll Status. Changes outside of these parameters will need to be submitted to the Shared Service Teams or Central Payroll for correction.

**Other Time Collection**

The concept of entering wage types, rate and cost center overrides will differ from current processing because these can be accomplished within the data entry section of CATS. Paying tips to a server at the food service operations at PMU is an example of a wage type used in CATS. Another wage type used in CATS would be the payment to an exempt veterinarian performing farm calls and receiving differing amounts based on billing criteria. The tip example uses code 1197 and veterinarian call uses code 1161. The correct profile in CATS must be used to access the columns required for the data entry (TAMOWT for monthly exempt staff and TABWWTRO).

In a similar concept, the rate paid to an employee can have an override in CATS. Athletics has scenarios where a tutor's rate of pay varies based on class size. Although only one rate and assignments exists for the employee, the rate override function can be used to pay appropriately. Temporary cost center/fund distributions may also have overrides to master data using CATS functions. Recall that the display working times report, in the audit steps previously discussed, will indicate if these override functions have been used.

The following screen print of CATS shows that employee number 287 has a one hour cost distribution override on 4/11, and a rate override of $10.00 for 4 hours, and on 4/10 a wage type override for tips (wage type 1197) of $35.75. These were entered using the CATS profile TABWWTRO.
Shift differentials will not be part of the basic pay rate. Shift differentials will be identified on infotype 0007 Planned Working Times in the **Additional time ID** field. The following screen print of employee 286 shows the additional time id fields as 3rd shift.
The shift differential amounts are linked to each individual campus and are identified as follows:

<table>
<thead>
<tr>
<th>OnePurdue</th>
<th>Additional</th>
<th>Time ID</th>
<th>Shift</th>
<th>Amount</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>OnePurdue</td>
<td>Additional</td>
<td>Time ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time ID</th>
<th>Shift</th>
<th>Amount</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>1st</td>
<td>-</td>
<td>First Shift-no differential</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>2nd</td>
<td>0.45</td>
<td>PU policy standard &gt;=4 hrs between 4pm and midnight</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>3rd</td>
<td>0.45</td>
<td>PU policy standard &gt;=4 hrs between midnight and 8 am</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>2nd</td>
<td>0.25</td>
<td>Calumet 2nd shift and Police</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>3rd</td>
<td>0.50</td>
<td>Calumet 3rd shift</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>2nd</td>
<td>0.20</td>
<td>N.C. pm shift &amp; F.W. if work evening shift</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>3rd</td>
<td>0.30</td>
<td>N.C. night shift &amp; F.W. if work 3rd shift</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>2nd</td>
<td>0.20</td>
<td>FT. Wayne &gt;=4 hrs between 4pm and midnight</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>3rd</td>
<td>0.30</td>
<td>FT. Wayne &gt;=4 hrs between midnight and 8 am</td>
<td></td>
</tr>
</tbody>
</table>

D=Desk Clerk PMU Hotel
D1 Desk       0.50  Desk Clerk at PMU-WL campus only
D2 Desk       0.95  Desk Clerk combined with 2nd shift-WL campus only
D3 Desk       0.95  Desk Clerk combined with 3rd shift-WL campus only

F=First Responder
F1 First Resp  0.20  First Responder-WL Campus only
F2 First Resp  0.65  First Responder combined with 2nd shift-WL campus only
F3 First Resp  0.65  First Responder combined with 3rd shift-WL campus only

Another concept that differs with OnePurdue is the cost distribution. Today the cost distribution is entered on the time slip with the hours of work. The cost distribution, which is similar to the PAIS functionality today, will be contained on IT0027. This is a totally separate screen and activity within OnePurdue. Cost distribution information must also be updated prior to the final payroll processing deadline. No time slip will be produced in OnePurdue. A report will be available for time administrators that identifies the current cost distribution recorded in the infotype Create Cost Distribution 0027 along with generating label information for time cards. A screen print of the Create Cost Distribution IT0027 follows.
The cost distribution for wages and salary is 100% to cost center 4030018000 beginning on 1/1/2006 and ending 12/31/9999. Payroll charges would be posted to this account unless an override to the cost distribution exists in CATS.

The last topic of other time collection in the OnePurdue system is a delivered process known as the (Family Medical Leave Act) FMLA workbench. The workbench uses standard FMLA rules. Time Administrators will have access to test or view those employees who are on an FMLA leave. A central FMLA Leave Administrator will utilize the system to manage the process. Concepts regarding the workbench follow.

- Employees still required to complete FMLA request forms
- Time Administrators can test or view employees on FMLA
- FMLA Leave Administrator checks for employee eligibility
- Unique absence codes to assist in identification of time used on continuous and intermittent FMLA leaves
- Record keeping uses leave actions and absence codes to document FMLA occurrence
- Eligibility will have to be manually overridden for the first year
Initial FMLA screen showing the selected person to enter the test request.

Drop down box with list of valid reasons for a FMLA absence.
Testing or checking the request for Family Medical Leave by the time administrator role owner.

Screen to create a FMLA request used by the FMLA Leave Administrator.

The FMLA Administrator will also assign previously reported absences to an employee's FMLA leave that have been approved. The following screen display shows that an absence has been checked to apply to a particular leave instance.
Assign Absences for FMLA occurrence. Absences are integrated with CATS data entry screen. Note that once an absence has been checked to apply to a leave occurrence, if the time data is retroactively changed, error messages will result in time evaluation.

This role will also have security to process summary reports regarding approved and in process FMLA leaves using the "ztm_fmla_detail_rpt" program. Sample results from this report follow.

Four leave occurrences for three different employees are displayed. The first three rows are continuous leaves, while the last row represents the intermittent type. Reasons are for bonding time, sick employee, family child illness, and family parent illness.
The Time and Leave Process Overview

Biweekly processing steps identified for the time administrator are as follows:

1) Run Campus Timecard Report to produce timecards, labels or distribution report as needed.
2) Distribute timecards to biweekly employees.
3) Collect approved and certified timecards at end of pay period with employee and supervisor signatures.
4) Review time cards for appropriate application of human resource policies.
5) Enter time card data into OnePurdue CATS screen using appropriate profile.
6) Notify staff of any changes to time card due to adherence to policy or lack of quota.
7) Calculate total hours recorded, total overtime hours and time card count for time data being entered into CATS. Suggest a calculator tape showing this information.
8) Run Missing Time Report
9) Correct missing time errors.
10) Run Display Working Times Report variant by Employee and verify data entry.
11) Correct time data entry errors.
12) Run Display Working Times Report variant by A/A type.
13) Compare manual calculation of total hours, overtime hours and number of cards to Working Times Report AA variant.
14) Correct time data entry errors
15) Enter changes to cost distribution (Infotype 0027) reported on time card.
17) Correct cost distribution and/or data entry errors.
18) Run Time Evaluation Messages Report the following day.
19) Review all warnings and correct evaluation warnings, if necessary.
21) Compare final reports verifying total hours, overtime hours and cost distribution with source (actual revised time cards).
22) File reports in item 20 above, calculator tape, and time cards.
23) Run optional reports as operationally desired:
   i. Display Absence Quota Information
   ii. Cumulated Time Evaluation Results for wage types and shift differentials generated
   iii. Time Statement
   iv. Cost Distribution by organizational unit, fund or cost center grouping
24) Run System Suspense and Cost Distribution Report at All Levels AFTER payroll processing posts charges to accounting.
25) Submit corrections to Infotype 0027 following post cost distribution procedures, as necessary.
Monthly processing steps identified for the time administrator are as follows:

1) Collect approved documentation for exception reporting of vacation, sick, etc.
2) Collect approved documentation for additional payments using wage types via CATS.
3) Collect approved documentation for changes to cost distribution.
4) Review data for appropriate application of human resource policies.
5) Enter time card data into OnePurdue CATS screen using appropriate profile.
6) Notify staff of any changes due to adherence to policy or lack of quota.
7) Calculate batch control totals of total hours and wage type dollars.
8) Run Display Working Times Report variant by Employee and verify data entry.
9) Correct time data entry errors.
10) Run Display Working Times Report variant by A/A type.
11) Compare manual calculation of total hours and wage type dollar totals to Working Times Report AA variant.
12) Correct time data entry errors.
14) Enter changes to cost distribution (Infotype 0027) reported on new cost distribution form and/or as identified with Distribution Change Report.
16) Correct cost distribution data entry errors.
17) Run Time Evaluation Messages Report the following day.
18) Review all warnings and correct evaluation warnings, if necessary.
20) Compare final reports verifying total hours, dollars and cost distribution with source documentation.
21) File reports in item 19 above and the additional documentation.
22) Run optional reports as operationally desired:
   i. Display Absence Quota Information
   ii. Cumulated Time Evaluation Results for wage types and shift differentials generated
   iii. Time Statement
   iv. Cost Distribution by organizational unit, fund or cost center grouping
23) Run System Suspense and Cost Distribution Report for All Levels AFTER payroll processing posts charges to accounting.
24) Submit corrections to Infotype 0027 following post cost distribution procedures, as necessary.

Processing steps identified for the FMLA workbench tester and administrator are as follows:

1) Assist supervisor or employee in mailing/completing/processing the paper FMLA request forms.
2) Check for eligibility to use FMLA (time administrators will only be able to run an initial test of eligibility).
3) Submit completed paper forms to appropriate central office or shared service team office.
4) Create Request in OnePurdue
5) Determine eligibility (final determination by FMLA administrator in central or shared service team office which will require system override in first year due to lack of hours worked history in OnePurdue.)
6) Deny Claim or Add Occurrence into FMLA Workbench.
7) Track FMLA Hours/Days using Workbench and absences recorded in CATS.
8) Follow-up with Return, Other Long Term leave processing or Termination.

**Time Administrator Role**

This role has the following responsibilities: enters employee's time, reviews employee's time, corrects timesheets, prepares Work-in-Process time entry, approves time sheets, releases time, runs quota balances report, runs time statement, runs time balances report, runs quota overview, and runs time evaluation messages report. As previously noted, the time administrator performs audit functions upon their data entry and others data entry into CATS with pilot programs. A custom security table has been written to link the position with to the actual 3 digit code identifying the time administrator. Thus, updates to the table will be required after go-live implementation, if changes to position duties or creation of new positions with time administrator functions occur. Recall that each employee will have a time administrator identified as part of master data upon employment.

The time administrator will also be able to test the Family Medical Leave Act (FMLA) eligibility of an employee; however, the results of this test will need central or shared service team overrides until a year's worth of time data is recorded into the OnePurdue system. The time administrators must also facilitate the FMLA paperwork flow that must be submitted to the central of shared service teams.

**Supervisor Role**

This role has the following responsibilities with the pilot electronic submission of time: enters employee's time, reviews employee's time, corrects timesheets, prepares Work-in-Process time entry, approves time sheets, releases time, runs quota balances report, runs time statement, runs time balances report, runs quota overview, runs time evaluation messages report.

**FMLA Leave Administrator**

The role has the following responsibilities: create, change, display delete FMLA workbench transactions. The FMLA Leave Administrator also uses the FMLA Workbench to assign recorded absences to the appropriate FMLA leave. The FMLA Leave Administrator role will also coordinate with the Time Administrator and a Benefits Processor for appropriate time recording and benefit handling.