Plant Maintenance Time Processing
PM_TP_300

IRIS
Integrated Resource
Information System

Prerequisites and Roles

IRIS
Integrated Resource
Information System

- Prerequisites
  - PM_UK_100 – PM IRIS Awareness & Navigation

- Roles
  - Users responsible for processing Plant Maintenance work order time

Course Content

- Introduction
- Unit 1 – CATS Time Entry
- Unit 2 – Selection Variants
- Unit 3 – Time Approval & Transfers
- Unit 4 – PM Direct Time Entry (STEPS)
- Unit 5 – Time Display
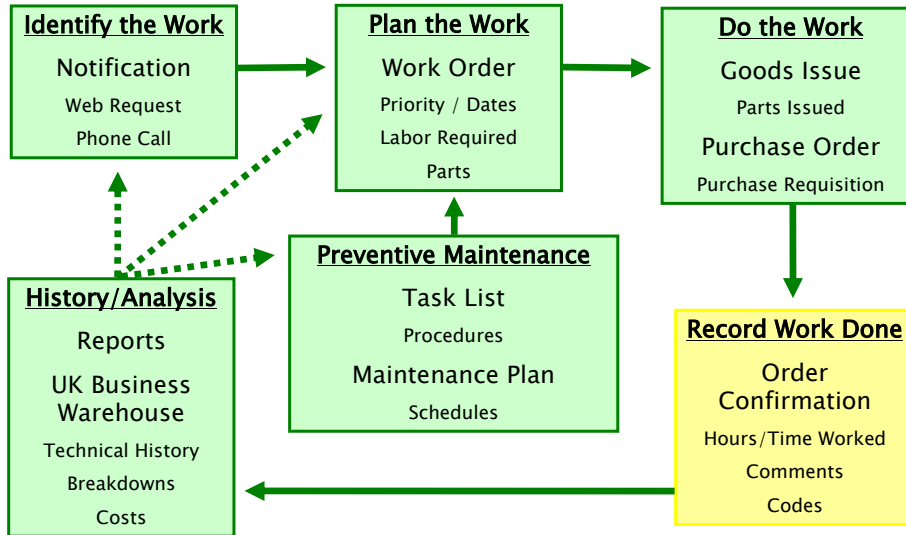- Course Summary
- Assessment

Course Learning Objectives

- Understand the complete Plant Maintenance (PM) order confirmation/time entry process
- Be able to enter, edit, approve, transfer, and display order confirmation time
- Learn how to create and save selection variants for working with multiple employees

The Maintenance Process

Identify the Work

Notification

Web Request

Phone Call

Plan the Work

Work Order

Priority / Dates

Labor Required

Parts

Do the Work

Goods Issue

Parts Issued

Purchase Order

Purchase Requisition

Preventive Maintenance

Task List

Procedures

Maintenance Plan

Schedules

History/Analysis

Reports

UK Business Warehouse

Technical History

Breakdowns

Costs

Record Work Done

Order Confirmation

Hours/Time Worked

Comments

Codes

PM Order Confirmation (Time) Processing

1. Time is entered in CATS: **CAT2** (**IW44** for STEPS)

2. Time is approved in CATS: **CATS_APPR_LITE**

3. Time is transferred from CATS to IRIS: **ZCAT6**

4. Time is transferred from CATS to PM: **CAT9**

Payroll Lock Schedule

- Used once a payroll process has started
- Allows Payroll/IRIS HR Team to either make corrections and/or run payroll
- Time can be entered and approved in CATS and transferred to PM, but it <u>can not be transferred to IRIS</u> when the system is locked
- System is locked as follows for a biweekly pay period:
  - Thursday 5:00 pm – Friday 7:00 am
  - Friday 5:00 pm – Saturday 7:00 am
 - Sunday 5:00 pm – Monday 7:00 am
  - Monday 3:00 pm – Wednesday 7:00 am

Unit 1

CATS Time Entry

CATS Time Entry

- Cross Application Time Sheet
- CATS is an <u>interface</u> application to IRIS-HR used for entering employee work/absence time
- Time can be entered on a daily basis – OR – once per pay period, just as long as it is entered by the required time input deadlines listed on the Payroll Schedule
- Although it is an interface to IRIS, CATS is still accessed using various IRIS transaction codes

- Click on the **Time Entry** box on the *SAP Easy Access* screen or enter transaction code **CAT2** to begin the time entry process

Time Entry
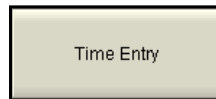
Data Entry Profile

- The **Data Entry Profile** field determines the <u>layout</u> of the CATS *Time Sheet: Data Entry View* screen
  - **PMDAYCA** – One day – Multiple employees
  - **PMDAYCA2** – One day – One employee
  - **PMWEEKC1** – Biweekly pay period – One/Multiple employees – No "To/From" time columns displayed (for Campus/Housing)
  - **PMWEEKCA** – Biweekly pay period – One/Multiple employees

* Time Sheet: Initial Screen

✗ Exit without Saving

Data Entry

Data Entry Profile   PMWEEKCA
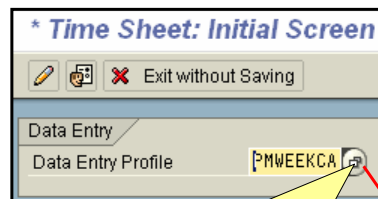
Click on the Possible Entries icon to select from list

Prof.	Text
PMDAYCA	Facilities Daily Time with Cost Allocation
PMDAYCA2	Facilities Single Daily Time with Cost Allocation
PMWEEKC1	Facilities Bi-Weekly Time without times
PMWEEKCA	Facilities Bi-Weekly Time with Cost Allocation

Key Date

- The **Key Date** field must be either the:
  - date for single-day entry
  - beginning date of a biweekly pay period
- This field (along with the **Data Entry Profile**) <u>must always</u> be completed and accurate before proceeding to the timesheet

Data Entry

| Data Entry Profile | PMWEEKCA | Facilities Bi-Weekly Time |
| Key date | 03/04/2007 |

Click on the Possible Entries icon to select from a Calendar if needed

Calendar 03/04/2007

Personnel Selection

- Click on the **Personnel Selectn** pushbutton in order to select the appropriate employee(s) [Personnel Selectn]
- For one employee, enter their **Personnel Number** then click on the Execute icon in the Application Toolbar

Personnel Number Selection for Fast Data Entry

Further selections | Search helps | Sort order

Period
- Today
- Up to today
- Other period
  - Period
  - Payroll period
- Current month
- From today
- Current year
- To

- Multiple employee selection is possible, but will be covered in the **Selection Variants** unit.

Selection
Personnel Number   17508
Employment status   0
Time recording administrator

Personnel Selection

- Click on the green Select All Persons icon in the Application Toolbar – OR – click on the gray box to the left of the Personnel Number column to select the employee

Time Sheet: Initial Screen

Exit without Saving

Data Entry

| Data Entry Profile | PMDAYCA | Facilities Daily Time with Cost Allocation |
| Key date | 03/18/2007 | |

Personnel Selection

Personn...	Name	Per...	Su...	E	E...	Cost Ctr	Org. un.	Ti...	Last nam
17508	Elee K Wall	1000	0001	A	05	1033150070	30000079		WALL EL

- Then click on the Enter Times (pencil) icon which will take you to the *Time Sheet: Data Entry View* screen

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PMDAYCA Data Entry Profile

- Enter the required fields (⭐), then click on the Save icon in the Standard Toolbar

Time Sheet: Data Entry View

Scroll 2 days before/after initial date

| Data Entry Period | 03/19/2007 - 03/19/2007 | Week | 12.2007 |

Data Entry Area

LT	Pers.No.	Name	COAr	ActTyp	Rec. order	Acti...	Work Ctr	Plant	A/A...	Total		MO 03/19	From	To
Σ	17508	Elee K Wall								7.50		7.50		
	17508	Elee K Wall	UK00	LABOR	807000000060	0010	UNASSIGN	CPPD	1005	0.75		0.75	08:00	08:45
	17508	Elee K Wall	UK00	LABOR	807000000070	0010	UNASSIGN	CPPD	1005	1.25		1.25	08:45	10:00
	17508	Elee K Wall	UK00	LABOR	807000000080	0010	UNASSIGN	CPPD	1005	0.92		0.92	10:15	11:10
	17508	Elee K Wall	UK00	LABOR	807000000090	0010	UNASSIGN	CPPD	1005	0.83		0.83	11:10	12:00
	17508	Elee K Wall	UK00	LABOR	807000000061	0010	UNASSIGN	CPPD	1005	0.75		0.75	12:30	13:15
	17508	Elee K Wall	UK00	LABOR	807000000072	0010	UNASSIGN	CPPD	1005	1.25		1.25	13:15	14:30
	17508	Elee K Wall	UK00	LABOR	807000000083	0010	UNASSIGN	CPPD	1005	0.92		0.92	14:45	15:40
	17508	Elee K Wall	UK00	LABOR	807000000094	0010	UNASSIGN	CPPD	1005	0.83		0.83	15:40	16:30

This profile allows you to enter for multiple employees for one day

PMDAYCA2 Data Entry Profile

- Enter the required fields (★), then click on the Save icon in the Standard Toolbar

Total Hours row

TIP: Use the Tab or Shift+Tab key(s) to scroll forward/back through the columns

This profile allows you to enter for one employee only for one day

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PMWEEKCA Data Entry Profile

- Enter the required fields (★), then click on the Save icon in the Standard Toolbar

Attendance/Absence Type column

The **Total** column lists the total for each row

This profile allows you to enter for multiple employees for one pay period

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Activity Types

- **ActTyp** = Planned rates from Order operation 0010
- Examples from Medical Center PPD:
  - **LABOR** – Building Maintenance Labor (<u>Default</u>)
  - **LABOR2** – General Maintenance Labor
  - **FURN** – Furniture/Moving Crew Labor
  - **DACESS** – Door Access Labor
  - **PAINT** – Painting Labor
  - **PEST** – Pest Control Labor
  - **CUSTOD** – Custodial Labor
  - **LOCK** – Locksmith Labor
- **Activity** column value is **0010** and relates to operation 0010 on the Order – "**Enter a sender**" message will appear if omitted

Attendance/Absence Types

- Attendance/Absence Types are used to associate the type of compensation with the hours entered
- Specific for each employee based on their Organizational Assignment master data
- 1xxx = Attendance Types
- 3xxx = Shift Differential/On Call (Attendance Types)
- 7xxx = Absence Types (Vacation, TDL, FMLA, etc...)
- For example:
  - 1005 = Regular Hours Worked
  - 1007 = Break Time
  - 3311 = Diff Evening Shift
  - 7170 = Vacation
  - 7180 = Full Sal Sick (TDL) – Emp

Time Entry Options

- Total time spent on a work order may be entered for Campus PPD & Housing in the day's date column (i.e. **SU 03/19**):

MO 03/19
7.50
0.75
1.25
0.92

- Start and end times should be entered for Medical Center PPD in the **From**/**To** columns:

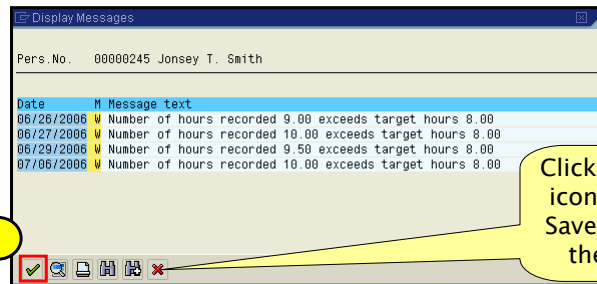| From	To
08:00	08:45
08:45	10:00
10:15	11:10

- ◆ Entered in <u>military time</u> (i.e. 08:00–08:45, 15:20–15:50)
- ◆ The system will automatically calculate the total time and populate that value in the day's date column

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Hourly Overtime

- Any time the number of hours entered on a day exceeds the Target Hours, you will receive the following Warning message screen when you click on the Save icon
- If the hours entered are accurate, click on the Continue icon (green checkmark) to accept and save the data

A/A...	Total	MO 06/26	TU 06/27	WE 06/28	TH 06/29	FR 06/30	SA 07/01	SU 07/02	MO 07/03	TU 07/04	WE 07/05	TH 07/06	FR 07/07	S
	72	8	8	8	8	8	0	0	8	0	8	8	8	
1005	78.50	9	10	8	9.50	8			8		8	10	8	

Display Messages

Pers.No.   00000245 Jonsey T. Smith

Date   M Message text
06/26/2006 W Number of hours recorded 9.00 exceeds target hours 8.00
06/27/2006 W Number of hours recorded 10.00 exceeds target hours 8.00
06/29/2006 W Number of hours recorded 9.50 exceeds target hours 8.00
07/06/2006 W Number of hours recorded 10.00 exceeds target hours 8.00

(1)

Click on the Cancel icon to cancel the Save and return to the time sheet

Non-Work Order Time Entry

- Any time for which an employee should be paid that is not directly related to a work order (i.e. 15-minute break time or shop time)
- Enter only the PERNR, the appropriate Attendance/Absence Type, and the number of hours (or specific times)
- Time will be charged to the default cost distribution established for the employee in IRIS-HR

Pers.No.	Name	ActTyp	Rec. order	Acti...	Work Ctr	Plant	A/A...	Total	SU 03/18	From	To	MO 03/19	From	To
17508	Elee K Wall							24	0			16		
17508	Elee K Wall	LABOR	807000000060	0010	UNASSIGN	CPPD	1005	0.75				0.75	08:00	08:45
17508	Elee K Wall	LABOR	807000000070	0010	UNASSIGN	CPPD	1005	1				1	08:45	09:45
17508	Elee K Wall						1007	0.25				0.25	09:45	10:00
17508	Elee K Wall	LABOR	807000000080	0010	UNASSIGN	CPPD	1005	4.17				1.17	10:00	11:10
17508	Elee K Wall	LABOR	807000000090	0010	UNASSIGN	CPPD	1005	0.83				0.83	11:10	12:00
17508	Elee K Wall	LABOR	807000000061	0010	UNASSIGN	CPPD	1005	0.50				0.50	12:30	13:00
17508	Elee K Wall	LABOR	807000000072	0010	UNASSIGN	CPPD	1005	4.50				1.50	13:00	14:30
17508	Elee K Wall						1007	0.25				0.25	14:30	14:45
17508	Elee K Wall	LABOR	807000000083	0010	UNASSIGN	CPPD	1005	2.92				0.92	14:45	15:40
17508	Elee K Wall	LABOR	807000000094	0010	UNASSIGN	CPPD	1005	0.83				0.83	15:40	16:30

Non-Work Order Attendance Types

- **1007** = Break time

- **1008** = Shop time or time worked that is not charged to a specific Order

PSG	A/ATy...	Att./abs. type text
01	1005	HOURS WORKED
01	1007	BREAK TIME OFF
01	1008	NON BILLABLE TIME
01	1009	MEETINGS AND TRAINING
01	1010	INDIRECT/OVERHEAD LABOR

- **1009** = Meeting and/or training time

- **1010** = Dispatch, office, administrative, or management time to be tracked (not directly associated with an Order)

Exception Time

- Exception Time is any time not considered as regular Hours Worked – mainly any type of leave/absence
- For example:
  - Vacation Leave
  - Temporary Disability Leave
  - Holiday/Bonus Day Leave
  - Funeral Leave
  - Military Leave
  - Family Medical Leave
  - Jury Duty
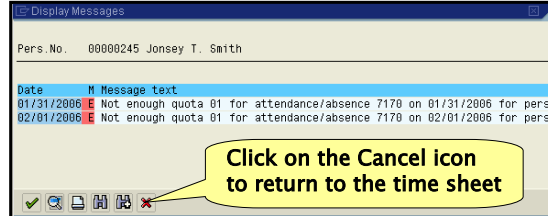- This time must be entered on separate rows on the timesheet

Exception Time

- Enter the employee's **Personnel Number**
- Enter the appropriate **Absence Type**
- Tab to the desired date and enter the number of hours
- Click on the Save icon in the Standard Toolbar

> Use Possible Entries icon to search for those A/A Types applicable to this employee

Insufficient Quota Message

- Received when you click on the Save icon and the employee does not have enough quota (Vacation, TDL, Holiday, or Military Leave) for the hours you have entered


```
Display Messages
Pers.No.   00000245 Jonsey T. Smith

Date        M Message text
01/31/2006 E Not enough quota 01 for attendance/absence 7170 on 01/31/2006 for pers
02/01/2006 E Not enough quota 01 for attendance/absence 7170 on 02/01/2006 for pers
```

Click on the Cancel icon to return to the time sheet

- You will need to make the appropriate adjustments to the entered time before the system will save the data
- You will also receive this message when entering Vacation leave if an employee has not completed their orientation period, even though they have accrued Vacation quota – TDL and Holiday quota may be taken during this period

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University Differential Pay Rates

- The approved differential pay rates for the University are maintained in a table in IRIS
- For example:
  - 3311 – Diff Evening Shift $0.75
  - 3312 – Diff Night Shift $1.25
- Enter the **Personnel Number**, appropriate **Attendance Type**, and number of hours


```
Display Messages
Pers.No.   00017508 Elee K Wall

Date        M Message text
03/19/2007 W Number of hours recorded 15.00 exceeds target hours 8.00
```

							A/A...	Total	MO 03/19	From	To
								15	15		
							1005	0.75	0.75	08:00	08:45
							1005	1.25	1.25	08:45	10:00
							1005	0.92	0.92	10:15	11:10
							1005	0.83	0.83	11:10	12:00
							1005	0.75	0.75	12:30	13:15
	17508	Elee K Wall	UK00 LABOR	807000000072	0010 UNASSIGN	CPPD	1005	1.25	1.25	13:15	14:30
	17508	Elee K Wall	UK00 LABOR	807000000083	0010 UNASSIGN	CPPD	1005	0.92	0.92	14:45	15:40
	17508	Elee K Wall	UK00 LABOR	807000000094	0010 UNASSIGN	CPPD	1005	0.83	0.83	15:40	16:30
	17508	Elee K Wall	UK00				3311	7.50	7.50		

Holiday Leave Time Entry

- Holiday leave is entered using **Absence Type of 7150** on the date in which Holiday quota is used – whether it's on the actual holiday or not – for both hourly and salaried employees

- Examples of Holiday leave taken ON the actual holiday:

- Hourly =

	LT	Pers.No.	Name	COAr	A/A...	Total	MO 07/02	TU 07/03	WE 07/04	TH 07/05	FR 07/06
	⏱	15708	Yvette West			72	8	8	0	8	8
		15708	Yvette West	UK00	1005	72	8	8		8	8
		15708	Yvette West	UK00	7150	0			8		

- Salaried =

	LT	Pers.No.	Name	COAr	A/A...	Total	MO 07/02	TU 07/03	WE 07/04	TH 07/05	FR 07/06
	Σ	7249	Kevin E Wozni_			0	0	0	0	0	0
		7249	Kevin E Wozni_		7150	0			8		

Holiday Leave Time Entry

- If an hourly employee works on a holiday, that time is entered as if it were a regular work day with the appropriate Attendance Types as applicable
- The day in which the hourly employee uses the Holiday quota is entered with Absence Type 7150
- Hourly example:

	LT	Pers.No.	Name	COAr	A/A...	Total	SU 07/01	MO 07/02	TU 07/03	WE 07/04	TH 07/05	FR 07/06
	⏱	15708	Yvette West			72	0	8	8	0	8	8
		15708	Yvette West	UK00	1005	72		8	8	8	8	
		15708	Yvette West		7150	0						8

- If a salaried employee works on a holiday, nothing is done in CATS (the employee is automatically paid for that day)

Holiday Leave Time Entry

- If an hourly employee is not eligible for holiday leave and/or regular time pay ON a holiday, enter nothing on that day
  - Alternatively, for reporting purposes, you may use Absence Type 7420, Unpaid Leave, and the correct number of hours ON the actual holiday

- If a salaried employee is not eligible for holiday leave and/or regular time pay ON a holiday, you must use Absence Type 7420, Unpaid Leave, ON the actual holiday

Unit 1 Exercise

- Complete the following exercise:
  - 1.1 – CATS Time Entry
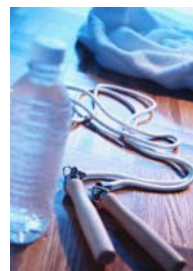
Time Entry Changes

- Follow the same steps used for normal time entry, making sure you indicate the correct **Data Entry** Profile and **Key Date** on the Initial Screen – then save your changes
- **Time changes must also be approved and transferred**
- IRIS will automatically adjust any pay/quota-related issues caused by the change
- If the "Payroll Correction Final Run" has already occurred, the adjustments will be on the next pay period's pay stub/remuneration statement
- If changes are made in CAT2 <u>after</u> the time is transferred to PM (CAT9), the system will automatically cancel the existing confirmation in PM and create a new one with the changed information
    - This occurs because each confirmation in PM creates an actual Financial posting in IRIS

Unit 1 Summary

Any questions related to:
- Data Entry Profile
- Key Date
- Personnel Selection
- CAT2 Time Entry/Profiles
- Activity Types
- Attendance/Absence Types
- Exception Time
- Differential Pay Rates
- Holiday Leave Time Entry
- Time Entry Changes

IRIS
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Selection Variants

Selection Variants

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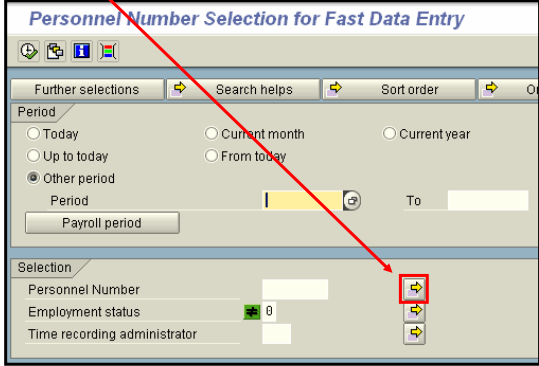
- Creating and saving a selection variant allows you to easily retrieve your group of employees
- Employees are identified using various selection criteria (i.e. Personnel Number and/or Organization Unit, etc…)
- The selection criteria is then saved with a variant <u>name</u>, which is saved with your User ID
- The variant is then retrieved by name – just as opening any other file on your computer
- Multiple selection variants can be created in a transaction
- A selection variant must be created in each transaction code in which it is needed

Creating a CAT2 Variant

- Click on the **Personnel Selection** pushbutton in the lower-left corner of the *Time Sheet: Initial Screen*
- Click on the Multiple Selection icon to the far-right of the **Personnel Number** field in the **Selection** section

Plant Maintenance Time Processing – V4   35
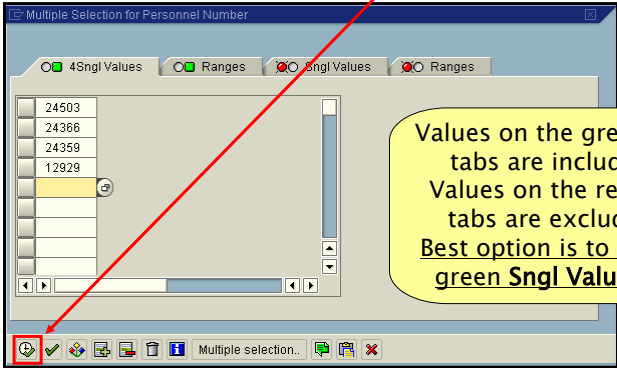
Creating a CAT2 Variant

- Enter the correct Personnel Numbers, one per line, using the Possible Entries icon to search if necessary
- When the Enter key is pressed, the tab will indicate the total number of numbers entered
- Click on the Execute icon to continue

Values on the green light tabs are included – Values on the red light tabs are excluded – Best option is to use the green **Sngl Values** tab

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Searching for PERNRs

- Click on the **Multiple selection** pushbutton
- Select the **Organizational assignment** tab
- Enter the specific selection criteria to obtain the desired list of employees
- Press the Enter key

Staff

Non-Exempt 40 hour
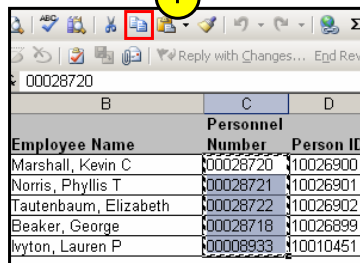
Department #

Plant Maintenance Time Processing – V4   37
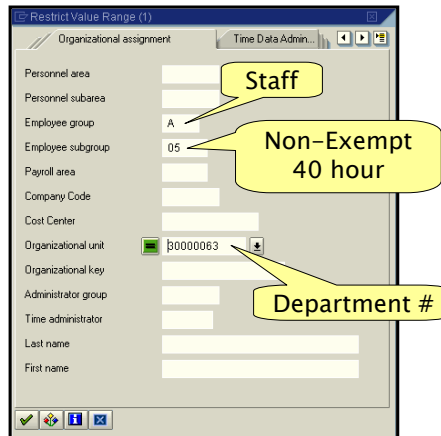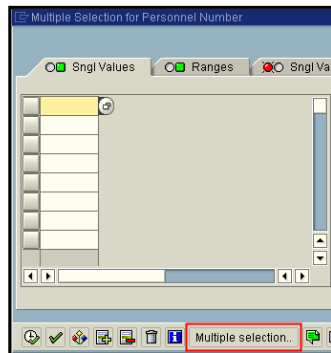
Searching for PERNRs

- Click in the checkbox(es) to select the employees
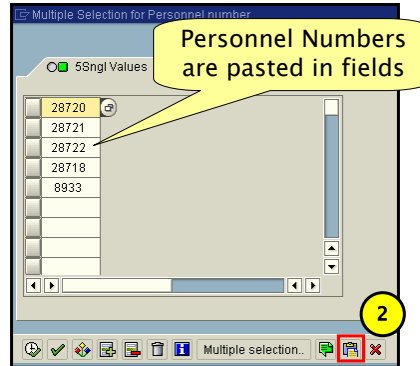- Press the Enter key
- Click on the Execute icon

Plant Maintenance Time Processing – V4   38
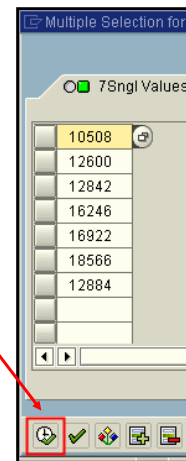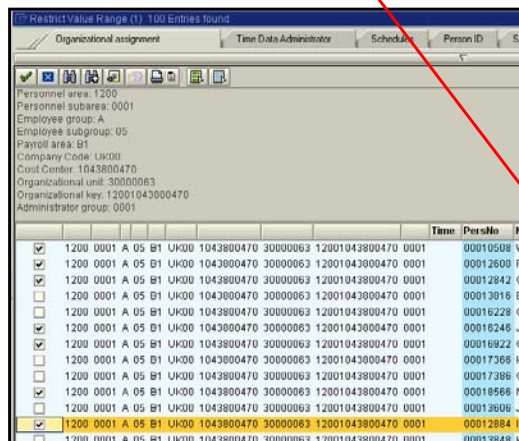
Importing PERNRs from External Application

- You can copy and paste a list of Personnel Numbers from an external application such as Excel

1. Select your data in the Excel spreadsheet and click on the **Copy** icon

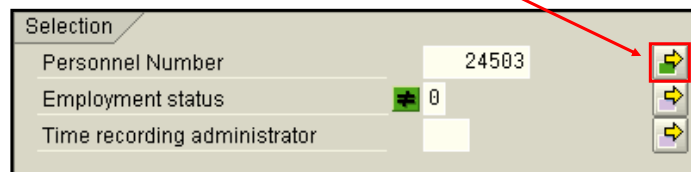2. Click on the **Upload from clipboard** icon in the IRIS window
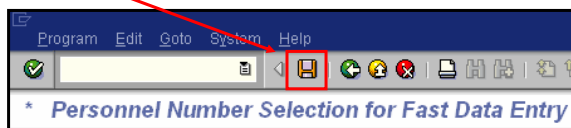
Creating a CAT2 Variant

- The green light on the Multiple Selection icon indicates multiple values exist for the field the icon is next to, in this case the **Personnel Number** field

- Note: Only the first Personnel Number in the list will be displayed in the field
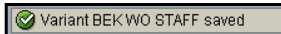- Click on the Save icon in the Standard Toolbar to proceed

Creating a CAT2 Variant

- Three fields to complete: **Variant name, Meaning,** and click in the checkbox next to **Protect variant**
- Facts about the **Variant name**:
  - Must be unique in CAT2
  - Can contain special characters and spaces
  - Other users with security access to CAT2 and your employees may <u>use</u> your variant
  - Other users can <u>change</u> your variant, unless **Protect variant** is checked

> **Meaning** is just a longer description of the variant, and is a required field

ABAP: Save as Variant

| Selection variables | Screen assignment | | | | |

Variant name	BEK WO Staff
Meaning	Brad's Work Order Staff
Created for selection screens	1000

Only for background processing	☐
Protect variant	☑
Only display in catalog	☐
System variant (automatic transport)	☐

Creating a CAT2 Variant

- Click on the Save icon in the Standard Toolbar to completely save the selection variant
- System will display an informational message in the Status Bar upon completion *Variant BEK WO STAFF saved*

- The **Personnel Number** values will remain on the *Personnel Number Selection for Fast Data Entry* screen – So you can either:
  - Click on the Exit icon to leave the transaction,
  - Click on the Execute icon to proceed to the display screen,
  - Click on the Multiple Selection icon and add/remove Personnel Numbers – <u>Be sure to Save after editing</u>

Using a CAT2 Variant

- Click on the Get Variant icon in the Application Toolbar

- Double-click on the desired selection variant

  ABAP: Variant Directory of Program RPLFST01

  Variant catalog for program RPLFST01

Variant name	Short descriptn.
BEK WO STAFF	Brad's Work Order Staff
COST DISTRIBUT	Cost Distribution
E24503	24503

- The saved values will automatically populate in the **Personnel Number** field

  Selection

  Personnel Number   24503

- Click on the Execute icon

bar

Inserting Rows with Multiple Employees

- To give <u>all employees</u> an additional row at one time, click on the "LT" column header box to select that column, then click on the Target Hours icon

* Time Sheet: Data Entry View

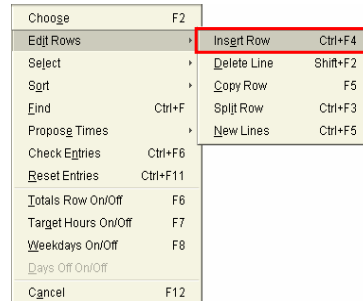Data Entry Period   03/19/2007 - 03/19/2007   Week   12

Target hours

You have not marked a line for input in the data entry section.

Should a new line be inserted with the target hours?

Yes   No   Cancel

Data Entry Area

LT	Pers.No.	Name	COAr	ActTyp	Rec. order	Acti...	Work Ctr	Plant	A/A...	Total	MO 03/19	From	To
Σ	24200	Jackson D Bra...								0	0		
	24200	Jackson D Bra...								0		00:00	00:00
Σ	11662	Mariah Wright								0	0		
	11662	Mariah Wright								0		00:00	00:00
Σ	9376	John A Emers...								0	0		
	9376	John A Emers...								0		00:00	00:00

Inserting Rows with Multiple Employees

Other insert options:

- Place cursor on any row for an employee and from the Menu Bar select **Edit → Edit Rows → Insert Row**

Choose	F2		
Edit Rows	►	Insert Row	Ctrl+F4
Select	►	Delete Line	Shift+F2
Sort	►	Copy Row	F5
Find	Ctrl+F	Split Row	Ctrl+F3
Propose Times	►	New Lines	Ctrl+F5
Check Entries	Ctrl+F6		
Reset Entries	Ctrl+F11		
Totals Row On/Off	F6		
Target Hours On/Off	F7		
Weekdays On/Off	F8		
Days Off On/Off			
Cancel	F12		

- **OR** Right-click on row and choose **Insert Row** from menu
- **OR** click on the employee's name, then click on the Insert Row icon in the Application Toolbar

Time Sheet: Data Entry View
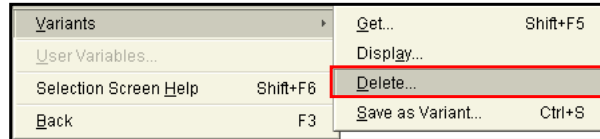

Unit 2 Exercises

- Complete the following exercises:
  - 2.1 – Creating a CAT2 Variant
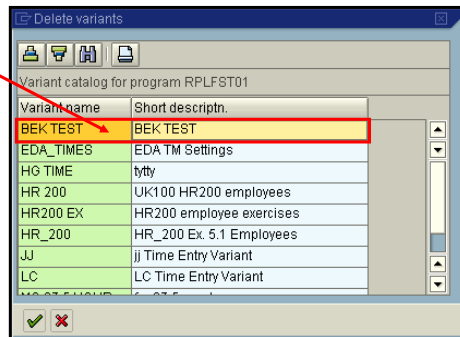 - 2.2 – Using a CAT2 Variant

Slide 47

Deleting a Variant

- From the Menu Bar on the *Personnel Number Selection for Fast Data Entry* screen select **Goto → Variants → Delete**
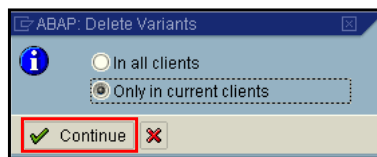
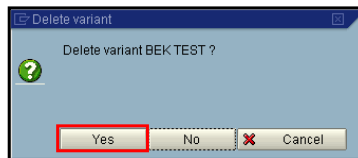| Variants | ▶ | Get... | Shift+F5 |
User Variables...		Display...	
Selection Screen Help	Shift+F6	Delete...	
Back	F3	Save as Variant...	Ctrl+S

- Double-click on the variant to be deleted

Delete variants

Variant catalog for program RPLFST01

Variant name	Short descriptn.
BEK TEST	BEK TEST
EDA_TIMES	EDA TM Settings
HG TIME	tytty
HR 200	UK100 HR200 employees
HR200 EX	HR200 employee exercises
HR_200	HR_200 Ex. 5.1 Employees
JJ	jj Time Entry Variant
LC	LC Time Entry Variant

Slide 48

Deleting a Variant

- Select **Only in current clients** and click on the **Continue** pushbutton

ABAP: Delete Variants
- ○ In all clients
- ● Only in current clients

✓ Continue ✖

- Click on the **Yes** pushbutton to delete

Delete variant

Delete variant BEK TEST ?

Yes   No   ✖ Cancel

- System message will appear in the Status Bar
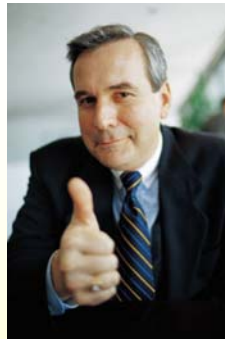
✓ Variant BEK TEST deleted

Unit 2 Summary

Any questions related to:

- Creating a selection variant for CAT2
- Searching for PERNRs
- Importing PERNRs from an external application
- Using a CAT2 variant
- Inserting rows for multiple employees
- Deleting a variant

Unit 3

Time Approval & Transfers

Time Approval

- Time entered in CATS <u>must</u> be approved on-line

- Changes made to time after the initial approval must also be approved on-line

- Employees will not be paid for any time that has not been approved on-line

Processing Status

- Time is automatically "stamped" with a Processing status as different actions are performed in the system
- For example, the most commonly used are:
  - **20** – Time has been entered and saved in CAT2 and is now ready to be approved
  - **30** – Time has already been approved with CATS_APPR_LITE
  - **50** – Time was previously approved, but changes were made in CAT2 which has unapproved this time – the changes now need to be approved

- Data is being processed
- Data has been released for approval
- Data has been approved
- There is at least one component for which approval was rejected
- Data was changed after approval
- Data has been reversed

Processing status (1)   6 Entries found

Processing status	Short text
10	In process
20	Released for approval
30	Approved
40	Approval rejected
50	Changed after approval
60	Cancelled

Reporting Period

- There are several different options for the **Reporting Period** field in the approval transaction:
  - ◆ All, Other Period, Current/Other Payroll Period, Etc...
- These options also work hand-in-hand with the **Processing Status** values
  - ◆ The **All** option is the most preferred and is <u>not</u> pay period-specific
    - ▪ For example: If the **Processing Status** is **20** (Released for approval), <u>only</u> time that needs approval will display, whether it's in the current pay period or not – this will also capture any retro changes that you may have made to prior pay period time
    - ▪ If the **Processing Status** is a range from **20 to 60**, ALL time for an employee will display, whether it needs approval, has been approved, has been changed since approval, etc...

Time Approval

- Enter T-code **CATS_APPR_LITE**
- **Reporting Period** should be **All**
- Enter the **Personnel Number(s)**
- Ensure **Processing Status** is **20**
- Click on the Save icon to save as a variant
- Click on the Execute icon

* Approve Working Times

Period	
Reporting Period	All

Selection Criteria
Personnel Number — 17508
Employment Status
Company Code
Cost Center

Use the Multiple Selection icon to enter/import/search for multiple PERNRs

Selection of Time Sheet
Task Type
Task Level
Task component
Activity Type — to
Stat. key figure — to
Att./Absence type — to
Wage type — to
Display Unit/Measure — to
Number (unit) — to
Processing status — 20 to
Short text — to

Time Approval

- Select all rows to be approved by clicking on first row to select then press the **Ctrl + A** keys on your keyboard
- Click on the Approve icon in the Application Toolbar

* Approve Working Times

Name	Pers.No.	Date	Status	AAR	Acct assgnt text	General receiver	Σ Number	MU	Short text	Acty Type	A/AType
Elee K Wall	17508	03/19/2007	△	Activity	Replace 20 lightbulbs	807000000060 0010	0.750	H	Replace 20 lightbulbs	LABOR	1005
			△	Activity	Repair door hinge	807000000070 0010	1.250	H	Repair door hinge	LABOR	1005
			△	Activity	Banister is off the wall	807000000080 0010	0.920	H	Banister is off the wall	LABOR	1005
			△	Activity	Hang new whiteboards & screen	807000000090 0010	0.830	H	Hang new whiteboards & screen	LABOR	1005
			△	Activity	Replace 20 lightbulbs	807000000061 0010	0.750	H	Replace 20 lightbulbs	LABOR	1005
			△	Activity	Repair door hinge	807000000072 0010	1.250	H	Repair door hinge	LABOR	1005
			△	Activity	Banister is off the wall	807000000083 0010	0.920	H	Banister is off the wall	LABOR	1005
			△	Activity	Hang new whiteboards & screen	807000000094 0010	0.830	H	Hang new whiteboards & screen	LABOR	1005
			△				7.500	H			3311
	17508						15	H			
Helen K Werner	15530	03/19/2007	△				4	H			7170
			△	Activity	Repair door hinge	807000000072 0010	1.170	H	Repair door hinge	LABOR	1005
			△	Activity	Replace 20 lightbulbs	807000000061 0010	1.330	H	Replace 20 lightbulbs	LABOR	1005
			△	Activity	Hang new whiteboards & screen	807000000090 0010	1.500	H	Hang new whiteboards & screen	LABOR	1005
	15530						8	H			
							23	H			

Time Approval

- Status Bar displays → ⊘ Work times / key figures were approved
- Status column icon changes to → 🖊

- Changes to approved time will display as follows:

Name	Pers.No.	Date	Status	F/S	Σ Number	MU	A/AType	Created on	Time	Created by	Last change	Time	Change
Helen K Werner	15530	03/19/2007	△		2	H	7180	03/27/2007	15:55:53	KREAGER	03/27/2007	15:55:53	KREAGER
			△	🔩	2	H	7170	03/27/2007	15:55:53	KREAGER	03/27/2007	15:55:53	KREAGER
	15530				4	H							
					4	H							

Document Flow

Date	Status	Number	MU	Processing status	Created on	Created by	Last change	Change	Approval date	Appr. by	Doc. no.	Trans.	COAr
03/19/2007	📄	2	H	Released for approval	03/27/2007	KREAGER	03/27/2007	KREAGER				HR	UK00
	🖋	4	H	Changed after approval	03/26/2007	KREAGER	03/27/2007	KREAGER	03/27/2007	KREAGER	1051	HR	UK00

Unit 3 Exercise

- Complete the following exercise:
  - ◆ 3.1 – Time Approval

Time Transfer

- After time data has been entered <u>and</u> approved in CATS, it must be transferred to:
  - ◆ IRIS-HR for Time Evaluation and payroll processing
  - ◆ IRIS-Plant Maintenance (PM) in order to populate the actual PM Order Confirmation(s) and post the financial cost allocations

Time Transfer to IRIS-HR

- Enter transaction code **ZCAT6**
- Enter the **Personnel Number(s)**
- Click on the Execute icon

Save as a variant

Transfer Time Data to HR Time Management

Processing Control
✓ Initial Transfer   Repeat Transfer

Data Selection for Initial Transfer
Personnel number   7508   to
Date   to
Customer field   to

Use the Multiple Selection icon to enter/import/search for multiple PERNRs

Infotypes
☑ Attendances/absences
☑ EE remuneration info
☑ Substitutions

Other Data
☑ Output log

Time Transfer to IRIS-HR

- Be patient with this process – It may take a few seconds to complete the transfer
- Ideal scenario is to have matching totals in the **Number of data records read** and **Number of successful postings** lines – If so, this process is complete – Exit the transaction

Transfer Time Data to HR Time Management

Number of unsuccessful postings: 0
Number of data records read: 16
Number of successful postings: 16

	Cxd Pers.No.	Valid From	A/AType	Hours	Crcy	WT Number	TMU	Amount	Type Number
	Message text								
○○■	15530	03/19/2007	7170	4.00		0.00			1
○○■	15530	03/19/2007	1005	1.17		0.00			2
○○■	15530	03/19/2007	1005	1.33		0.00			3
○○■	15530	03/19/2007	1005	1.50		0.00			4
○○■	15530	03/19/2007	7170	2.00		0.00			5
○○■	15530	03/19/2007	7180	2.00		0.00			6

Time Transfer to IRIS-HR with Errors

- Any unsuccessful postings will need to be corrected in CAT2 – **then also** approved and transferred

On 03/20/2006 both 1005 and 7170 time were entered – All other days with a "green light" **did** transfer!

Transfer Time Data to HR Time Management

Number of unsuccessful postings:						1
Number of data records read:						11
Number of successful postings:						10

⚠ Cxd Pers.No. Valid From A/AType Hours Crcy WT Number TMU Amount Type Number
Message text

☐ ⬤◯◯   248 03/20/2006 7170   8.00   0.00   1
S 00000248 Infotype record was created using the Time Sheet
S 00000248 No batch input data for screen MP200000 2051
E 00000248 Record from 03/20/2006 with subtype 7170 could not be posted
W 00000248 This entry deletes a record

☐ ◯◯🟩   248 03/20/2006 1005   8.00   0.00   2

☐ ◯◯🟩   248 03/21/2006 1005   8.00   0.00   3

- Bad cost allocation, collision with time already in Infotypes 2001/2002, or (as in the example above) conflicting time entries on the say date are just a <u>few</u> of the possible reasons for an unsuccessful transfer

---

Unit 3 Exercise

- Complete the following exercise:
  - ◆ 3.2 – Time Transfer to IRIS-HR

Verifying Transferred Time - ZVERXFER

Save as variant!

Enter data in all three sections – Click on the Execute icon to generate the report

Plant Maintenance Time Processing – V4   63

Verifying Transferred Time

- Time not transferred will be listed first
- Two reasons for a "No" transfer:
  - No corresponding record in IRIS for the Attendance or Absence code on the date in question
  - There is a corresponding record, but the hours do not match

Plant Maintenance Time Processing – V4   64

Time Transfer to IRIS-Plant Maintenance

- Enter transaction code **CAT9**
- Enter the **Personnel Number(s)**
- Click on the Execute icon

Save as a variant

* CATS: Transfer to Plant Maintenance/Customer Service

Selection Parameters

Personnel no.	7508	to
Date		to
Order		to
Document no.		to

Use the Multiple Selection icon to enter/import/search for multiple PERNRs

Date for Entry of Confirmations

Posting date
Posting date for cancellation

Select Test run 1st to check for errors

Control Parameters

Number of tasks   1
No. of lock attempts   99

☑ Log
☐ Test run   Is this a test run?

Plant Maintenance Time Processing – V4   65

Time Transfer to IRIS-Plant Maintenance

* CATS: Transfer to Plant Maintenance/Customer Service

Choose   Save

```
No. of records read:            8
No. of records saved successfully:     8

Number of records read:                 8

No. of confirmations generated:         8
No. of confirmations canceled:          0
No. of confirmations with errors:       0
No. of cancellations with errors:       0
Number of locked confirmations:         0

No postprocessing pool generated

No messages from cost determination
```

⚠	Order	OpAc SOp Confirm.	Cap Spl	Work Ctr	F	Postg Date	Act.finish	Act. start	Un.	Act.work	ActTyp	WageTy	Conf.	Text	RemainWrk	Fcs
	Message ID Msg.no. Message														
☐	807000000060 0010	301	0	UNASSIGN		03/19/2007	00:00:00	00:00:00	H	2.0	LABOR				0.0	
☐	807000000060 0010	301	0	UNASSIGN		03/19/2007	00:00:00	00:00:00	H	2.0	LABOR				0.0	
☐	807000000060 0010	301	0	UNASSIGN		03/19/2007	00:00:00	00:00:00	H	2.0	LABOR				0.0	
☐	807000000060 0010	301	0	UNASSIGN		03/19/2007	00:00:00	00:00:00	H	2.0	LABOR				0.0	
☐	807000000060 0010	301	0	UNASSIGN		03/19/2007	00:00:00	00:00:00	H	2.0	LABOR				0.0	
☐	807000000070 0010	311	0	UNASSIGN		03/19/2007	00:00:00	00:00:00	H	2.0	LABOR				0.0	
☐	807000000080 0010	321	0	UNASSIGN		03/19/2007	00:00:00	00:00:00	H	2.0	LABOR				0.0	
☐	807000000090 0010	331	0	UNASSIGN		03/19/2007	00:00:00	00:00:00	H	2.0	LABOR				0.0	

Plant Maintenance Time Processing – V4   66

Time Transfer to IRIS-PM with Errors

* CATS: Transfer to Plant Maintenance/Customer Service

```
No. of records containing errors:        3
No. of records read:        11
No. of records saved successfully:       8

   Number of records read:                 11

   No. of confirmations generated:          8
   No. of confirmations canceled:           0
   No. of confirmations with errors:        3
   No. of cancellations with errors:        0
   Number of locked confirmations:          0

   No postprocessing pool generated

   No messages from cost determination
```

⚠ Order	OpAc SOp Confirm. Cap Spl Work Ctr F Postg Date Act.finish Act. start Un. Act.work ActTyp WageTy Conf. Text RemainWrk Fcs
Message ID Msg.no. Message text	
☐ 807000000072 0010	0 UNASSIGN 03/19/2007 12:00:00 10:50:00 MIN 70.2 LABOR 0.0
E 00	398 Hours worked exceed Start and End times. Please correct times for 00015530 20070319 0010
☐ 807000000080 0010	0 UNASSIGN 03/19/2007 11:10:00 10:15:00 MIN 55.2 LABOR 0.0
E 00	398 Hours worked exceed Start and End times. Please correct times for 00017508 20070319 0010
☐ 807000000083 0010	0 UNASSIGN 03/19/2007 15:40:00 14:45:00 MIN 55.2 LABOR 0.0
E 00	398 Hours worked exceed Start and End times. Please correct times for 00017508 20070319 0010
☐ 807000000060 0010	301 0 UNASSIGN 03/19/2007 08:45:00 08:00:00 MIN 45.0 LABOR 0.0
☐ 807000000061 0010	302 0 UNASSIGN 03/19/2007 13:15:00 12:30:00 MIN 45.0 LABOR 0.0
☐ 807000000061 0010	302 0 UNASSIGN 03/19/2007 10:50:00 09:30:00 MIN 79.8 LABOR 0.0

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Plant Maintenance Time Processing - V4   67

Unit 3 Exercise

- Complete the following exercise:
  - 3.3 – Time Transfer to IRIS-PM

UK UNIVERSITY OF KENTUCKY   Plant Maintenance Time Processing - V4   68

PM Order Confirmation (Time) Processing

1. Time is entered in CATS: **CAT2** or **IW44** (STEPS)

2. Time is approved in CATS: **CATS_APPR_LITE**

3. Time is transferred from CATS to IRIS: **ZCAT6**

4. Time is transferred from CATS to PM: **CAT9**

5. Time can be displayed: **CATS_DA** & **IW43**

Unit 3 Summary

Any questions related to:
- Time Approval
- Processing Status field
- Reporting Period field
- Time Transfer to IRIS-HR
- Time Transfer to IRIS-Plant Maintenance

Unit 4

PM Direct Time Entry (STEPS)

PM Order Confirmation – IW44

- Collective method of capturing the time worked against existing Work Orders – mainly by <u>STEPS employees</u>
- Time is entered using the following required fields:
  - **Posting Date** – Date on which the confirmation (of time entry) is posted – The system defaults to the current date
  - **Personnel Number** – Unique IRIS-HR number for an employee
  - **Order** – The Work Order number for the time being entered
  - **Actual Work** – Total amount of time spent on Order
  - **Start/End Dates** – Start and end dates of the work

- Optional fields – for informational purposes only:
  - **Start/End Times** – Start/End times of the work in military time
  - **Notes** – Any comments noted on the Work Order

PM Order Confirmation – IW44

- Default Values Line
  - The values entered (or defaulted) in this line will be copied to each line in the section below (upon pressing the Enter key) – thus becoming the default values for each line and reducing the amount of data entry required
  - Example of the initial screen upon entering the transaction:

PM Order Confirmation: Collective Confirmation

PM Order Confirmation – IW44

- Example: Today is June 7th, and you wish to enter Work Order times for Personnel Number 24503 for June 6th:

- Example continued: Three Work Orders are entered with 1.25 hours each – Only the **Order** and **Act. Work** fields needed to be completed – All other data is from either the Default Values line or is derived from the Work Order

Cancel PM Order Confirmation – IW45

- Once an order confirmation is saved, it becomes an actual financial posting for cost allocation purposes
- If a confirmation must be changed for any reason, it must first be cancelled and then a new confirmation entered
- Use transaction code **IW45** to cancel a confirmation

* Cancel PM Order Confirmation: Initial Screen

❌ Exit without Saving

Use Possible Entries icon to search if unknown

Order   B001000073
Oper./Act.

- Enter **Order** number and press the Enter icon/key

Cancel PM Order Confirmation – IW45

- If only ONE confirmation exists for the Order, the *Actual data* screen for the confirmation will appear
- Click on the Save icon in the Standard Toolbar to initiate the Cancel action

* Cancel PM Order Confirmation: Actual data

Notification | MeasDocuments | Administr. | ❌ Exit without Saving | Time and Codes Confirmation

Order   8001000073   Electricity Charges
Oper./Act.   0010 Electricity Charges

Confirmation Data
                       / 1
Work Center   UNASSIGN MPPD Unassigned Work
Personnel No.   24503   Bruce Miller
Actual Work   0.25   Activity Type   LABOR1 Posting Date   01/10/2007
                 ☐ Final Confirmtn
Work Starts on   01/10/2007 17:00:00
Work Ends on   01/10/2007 17:15:00

Confirm. Text

Cancel PM Order Confirmation – IW45

- The "**Reason for cancellation**" screen appears and allows you to enter unlimited text
  - ◆ You can also insert text from external sources if necessary
- Click on the Back icon in the Standard Toolbar when finished
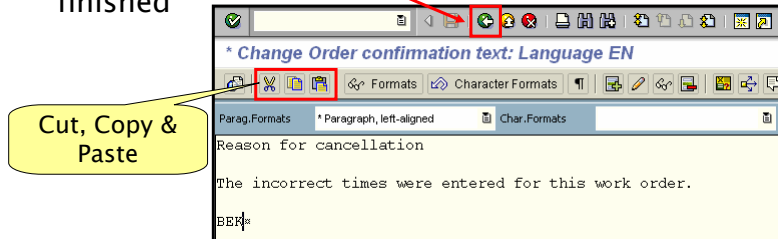
Cut, Copy & Paste

* Change Order confirmation text: Language EN

Parag.Formats * Paragraph, left-aligned   Char.Formats

Reason for cancellation

The incorrect times were entered for this work order.

BEK

- In the Status Bar, the system will confirm cancellation

Confirmation of order 8001000073 is cancelled

Cancel PM Order Confirmation – IW45

- If MULTIPLE confirmations exist for the Order, process as follows:
  - ◆ Click on **Yes**

Status management: Confirm order

Do you want to carry out transaction despite warning?

No

Yes

Status information
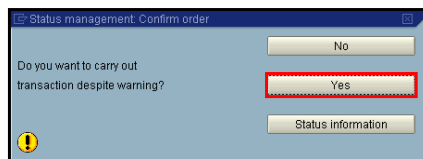
  - ◆ Click on gray box to the far-left of the confirmation to be cancelled
  - ◆ Click on the Actual data icon in the Application Toolbar

* Cancel PM Order Confirmation: Operation Overview

Order   8001000045   Intergrated Test Order

Confirmations for Operations and Suboperations

Co	Op.	Su...	Ty.	Spl	Confirmt...	F	C	Pstg Dt.	Work Ctr	Act. Work	Unit	ATy.	Description	Ty.
	0010												Intergrated Test Order	
					1			12/20/06	CABINET	7.99	LABOR1			
					2		✓	01/17/07	CABINET	0.50	LABOR1			

Cancel PM Order Confirmation – IW45

- The *Actual data* screen for the selected confirmation will display to allow for final verification that this is the correct confirmation to be cancelled
- Click on the Save icon in the Standard Toolbar
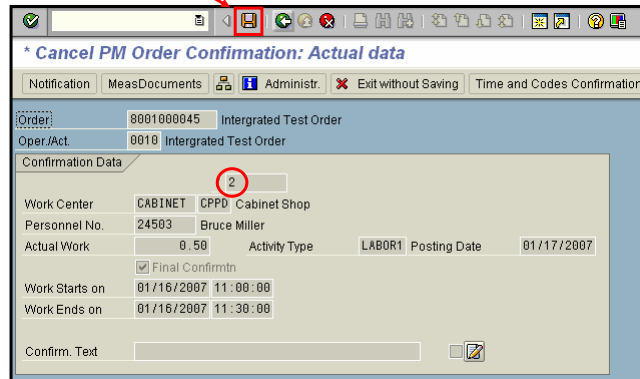
Cancel PM Order Confirmation – IW45

- Enter a **Reason for cancellation**
- Click on the Back icon when finished
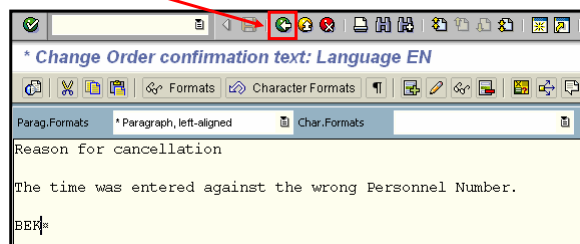
- In the Status Bar, the system will confirm cancellation
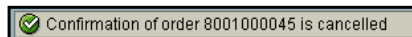
Displaying Cancelled Confirmations – IW43

- The checkmark in the "**C**" column indicates the cancelled confirmation
- Double-click on line to view the confirmation

- Click on the Text icon to see the "Reason for cancellation" text

Unit 4 Summary

Any questions related to:

- Entering PM Order Confirmations
- Cancelling a PM Order Confirmation

Unit 5

Time Display

Displaying Time in CATS

- Enter transaction code **CATS_DA**
- Select the desired **Payroll Period**
- Enter the **Personnel Number(s)**
- Select appropriate **Processing Status**
- Click on the Execute icon

Save as a variant

Use the Multiple Selection icon to enter/import/search for multiple PERNRs

* Display Working Times

Payroll Period
Period — Other Payroll Period
Payroll Area — B1 03/18/2007 - 03/31/2007
Period — 7 2007

Selection Criteria
Personnel Number — 17508
Employment Status
Company Code
Cost Center

Selection of Time Sheet
Task Type
Task Level
Task component — to
Activity Type — to
Stat. key figure — to
Att./Absence type — to
Wage type — to
Display Unit/Measure — to
Number (unit) — to
Processing status — 10   to   40

Displaying Time in CATS

- Icons in the Application Toolbar allow for further manipulation of the data seen in a report

View Details | Sorting | Filter | Display Sum | Subtotal | Export to Excel | Change/Save/Choose Layout

Display Working Times

Name	Pers.No.	Date	Status	F/S	AAR	Acct assgnt text	General receiver	Σ Number	MU	Short text	Acty Type	A/ATY
Elee K Wall	17508	03/19/2007			Activity	Replace 20 lightbulbs	807000000060 0010	0.750	H	Replace 20 lightbulbs	LABOR	1005
					Activity	Repair door hinge	807000000070 0010	1.250	H	Repair door hinge	LABOR	1005
					Activity	Banister is off the wall	807000000080 0010	0.920	H	Banister is off the wall	LABOR	1005
					Activity	Hang new whiteboards & screen	807000000090 0010	0.830	H	Hang new whiteboards & screen	LABOR	1005
					Activity	Replace 20 lightbulbs	807000000061 0010	0.750	H	Replace 20 lightbulbs	LABOR	1005
					Activity	Repair door hinge	807000000072 0010	1.250	H	Repair door hinge	LABOR	1005
					Activity	Banister is off the wall	807000000083 0010	0.920	H	Banister is off the wall	LABOR	1005
					Activity	Hang new whiteboards & screen	807000000094 0010	0.830	H	Hang new whiteboards & screen	LABOR	1005
								7.500	H			3311
	17508							■ 15	H			
Helen K Werner	15530	03/19/2007						2	H			7180
								2	H			7170
					Activity	Repair door hinge	807000000072 0010	1.170	H	Repair door hinge	LABOR	1005
					Activity	Replace 20 lightbulbs	807000000061 0010	1.330	H	Replace 20 lightbulbs	LABOR	1005
					Activity	Hang new whiteboards & screen	807000000090 0010	1.500	H	Hang new whiteboards & screen	LABOR	1005
	15530							■ 8	H			
								■ ■ 23	H			

Unit 5 Exercise

- Complete the following exercise:
  - 5.1 – Displaying Time in CATS
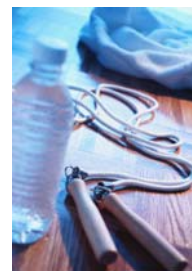
Displaying PM Order Confirmations

- Enter transaction code **IW43**
- Enter the **Order** number or use the Possible Entries icon to search
- Press the Enter icon/key

Display PM Order Confirmation: Initial Screen

Use Possible Entries icon to search if unknown

Double-click to select the desired Work Order

Displaying PM Order Confirmations

- If only one confirmation exists, it will automatically display the *Actual data* screen

Display PM Order Confirmation: Actual data

Displays when and who entered and changed this data

Displaying PM Order Confirmations

- Screen below will appear first if multiple confirmations exist for a Work Order:

- Click on the gray box to the far-left of a line to select, then click on the Actual Data icon

Confirmation #

Plant Maintenance Time Processing – V4   89

Displaying PM Order Confirmations

- Click on the Select All icon, then the Actual Data icon

Click Next icon

Plant Maintenance Time Processing – V4   90

Unit 5 Exercise

- Complete the following exercise:
  - 5.2 – Displaying PM Order Confirmations

Display Confirmation from a List

- Enter transaction code **IW47**
- Verify the **Order status** options and enter any other search criteria as desired
- Check the **Entered on** and/or **Posting Date** fields – edit if necessary
- Click on the Execute icon to generate the list of confirmations

Execute icon

Leave blank

Display Confirmation from a List

- Double-click on the gray select box to the far-left of the confirmation you wish to display

Unit 5 Exercise

- Complete the following exercise:
  - 5.3 – Display Confirmation from a List

Unit 5 Summary

Any questions related to:
- Displaying time in CATS
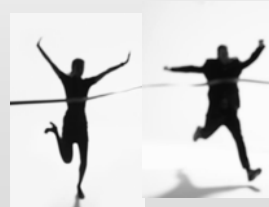- Displaying PM order confirmations

Course Summary

You should now be able to:
- Understand the entire Plant Maintenance (PM) work order time entry process
- Enter, edit, approve, transfer, and display work order time in CATS
- Create and save selection variants
- Enter, edit and display work order time in Plant Maintenance

Contact Information

- First point of contact for any problems should be the IRIS- PM Power User in your area
    - Nick Arnold – Nick@uky.edu – 559-7605
    - Kevin Jones – Kevin.Jones@uky.edu – 7-3421
    - Skip Van Hook – bevanh2@email.uky.edu – 7-5397

- IRIS Plant Maintenance Team
    - Kevin Cheser – kchese@email.uky.edu
    - Ben Crutcher – ben@email.uky.edu

- For more information visit the IRIS PM web site:
    - www.uky.edu/IRIS/PM