

**Work Schedule Substitution**

**PA61**

**Change History**

Update the following table as necessary when this document is changed:

<b>Date</b>	<b>Name</b>	<b>Change Description</b>
11/1/04	Marie Dunlap	Initial Draft
11/17/04	Emilie Miller	Edit 1
11/16/05	Ileana Maldonado	Update
12/12/06	Kelly Welsh	Update added IT 2003 instructions
1/3/2007	Kelly Welsh	Added description of Icons.

*Title: Work Schedule Substitution*

**Processes :**

**Sub-Processes :**

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HRMS Training Documents

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State of Washington HRMS

**File name:** WORK\_SCHEDULE\_SUBSTITUTIO  
N.DOC  
**Reference Number:**

**Version:** SME Approved Script  
**Last Modified:** 1/7/2009 3:42:00 PM

SAP Parent  
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### Purpose

Use this procedure to record a work schedule substitution to complete accurate time recording for an employee.

### Trigger

- A work schedule substitution is needed to record leave (paid or unpaid) on a scheduled day off.

### Prerequisites

Employee has been hired and is active in HRMS.

### Menu Path

- Human Resources → Time Management → Administration → Time Data → Maintain

### Transaction Code

**PA61**

### Helpful Hints



There are two ways to update the work schedule. If the dates are not consecutive it maybe easier to use transaction code **PA61** and access the Month view. If the dates are consecutive, it may be easier to use transaction code **PA61** and access the **Substitution (2003)** Infotype.

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
<b>Error</b> 	<b>Example:</b> Make an entry in all required fields. <b>Action:</b> Fix the problem(s) and then click  (Enter) to proceed.
<b>Warning</b> 	<b>Example:</b> Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. <b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
<b>Confirmation</b> or	<b>Example:</b> Save your entries. <b>Action:</b> Perform the required action to proceed.

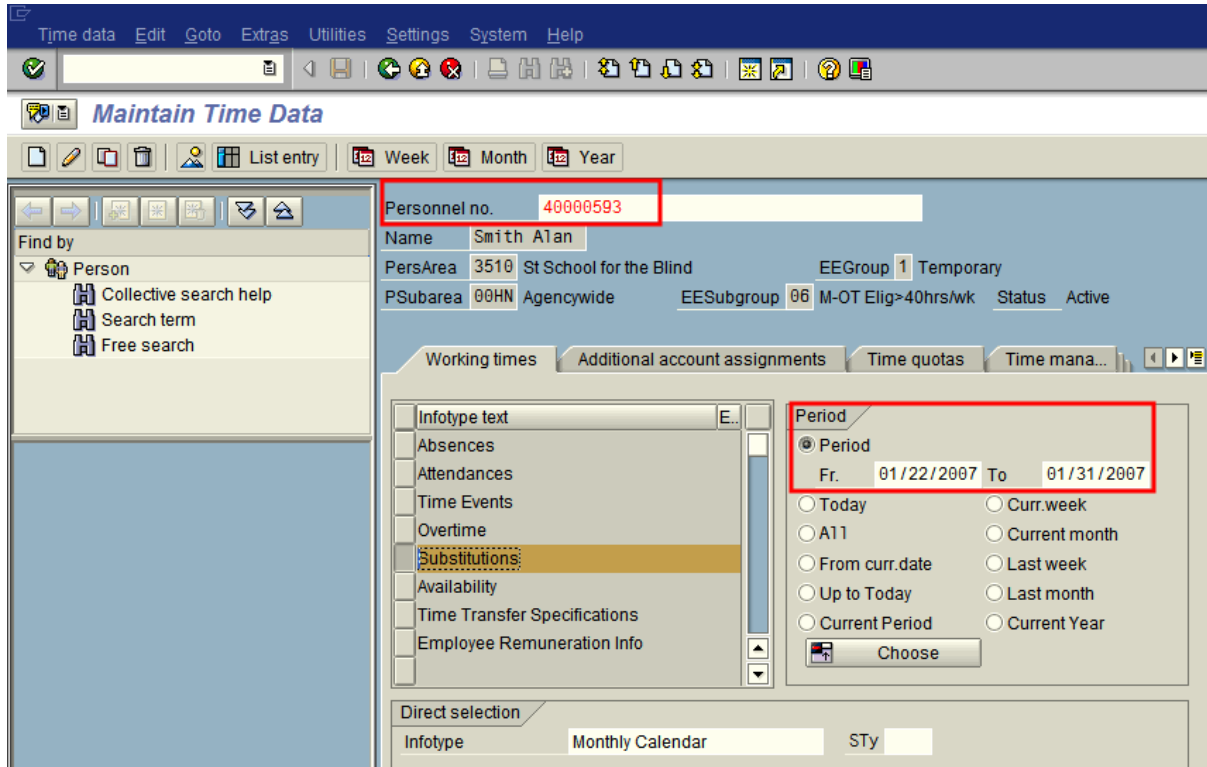
**Procedure**

Steps 1 – 10 describe how to complete a work schedule substitution for non-consecutive dates.

Steps 11 – 24 describe how to complete a work schedule substitution for consecutive dates.



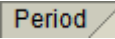

1. You have started the transaction using the menu path or transaction code **PA61**.

**Maintain HR Master Data**


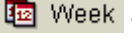
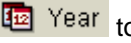


2. Complete the following fields:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number <b>Example:</b> 40000593
From.	R	This is the date that substitution beings. <b>Example:</b> 1/22/2007
To	R	This is the date the substitution ends. <b>Example:</b> 1/31/2007

3. Click  (Enter) to validate the information.
4. Click the grey box to the left of  to select.
5. Enter the dates that need to be changed for the work schedule substitution under the  tab.
6. Click  to view work schedule in a monthly calendar.



To view an employees work schedule in a calendar format, you can click  to view work schedule in a monthly calendar,  to view the work schedule in a weekly calendar, and  to view to work schedule in a yearly calendar.

## Change Monthly Calendar

Change Monthly Calendar (2051)

Choose | Attendances/absences | Personal work schedule


Personnel No: 40000593 | Name: Smith A... | Status: Active  
EE group: 1 Temporary | Personnel ar: 3510 | St School for the Blind  
WS rule: FULL | 5-8s: M-F ... | SSN: 500-50-5070  
Start: 01/22/2007 | To: 02/21/2007

FD	LD	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
22	- 27		D001	D001	D001	D001	D001	OFF
28	- 03	OFF	D001	D001	D001	D001	D001	OFF
04	- 10	OFF	D001	D001	D001	D001	D001	OFF
11	- 17	OFF	D001	D001	D001	D001	D001	OFF
18	- 21	OFF	D001	D001	D001			

7. As needed, make appropriate changes to the employee's schedule.





For example, the employee's normal scheduled day off is Saturday, however the employee has received approval to work on Saturday and take Friday off instead. This

change can be made by clicking into the fields that need change and using the  (Matchcode button) to open the selection list.

### Change Monthly Calendar

Personnel No 40000593 Name Smith A... Status Active  
EE group 1 Temporary Personnel ar 3510 St School for the Blind  
WS rule FULL 5-8s: M-F ... SSN 500-50-5070  
Start 01/22/2007 To 02/21/2007

FD	LD	Sunday	Monday	Tuesday	Wednes...	Thursday	Friday	Saturday
22	- 27		D001	D001	D001	D001	OFF	D001
28	- 03	OFF	D001	D001	D001	D001	OFF	D001
04	- 10	OFF	D001	D001	D001	D001	OFF	D001
11	- 17	OFF	D001	D001	D001	D001	OFF	D001
18	- 21	OFF	D001	D001	D001			

8. If all changes are made, click  (Enter) to validate the information.
9. Click  (Save) to save.

### Change Monthly Calendar

Change Monthly Calendar (2051)

Personnel No 40000593 Name Smith A... Status Active

EE group 1 Temporary Personnel ar 3510 St School for the Blind

WS rule FULL 5-8s: M-F ... SSN 500-50-5070

Start 01/22/2007 To 02/21/2007

FD	LD	Sunday	Monday	Tuesday	Wednes...	Thursday	Friday	Saturday
22	- 27		D001	D001	D001	D001	OFF	D001
28	- 03	OFF	D001	D001	D001	D001	OFF	D001
04	- 10	OFF	D001	D001	D001	D001	OFF	D001
11	- 17	OFF	D001	D001	D001	D001	OFF	D001
18	- 21	OFF	D001	D001	D001		OFF	D001



Once you click save, a system message will display indicating that the record has been changed.

In this example, Friday has been changed to the employees scheduled day off, and Saturday has been changed to a regular work day. These changes are noted by the "S" (substitution) under the work schedule rule.

### Work Schedule Substitution Using *Substitution* (2003)

10. You have started the transaction using the menu path or transaction code **PA61**.





## Maintain Time Data

The screenshot shows the SAP 'Maintain Time Data' screen for employee Alan Smith (Personnel no. 40000593). The 'Substitutions' option is selected in the left-hand menu. The 'Period' section is set to 'Period' with a start date of 01/22/2007 and an end date of 01/31/2007. Other fields include Name (Smith Alan), PersArea (3510), St School for the Blind, EEGroup (1), Temporary, PSubarea (00HN), Agencywide, EESubgroup (06), M-OT Elig>40hrs/wk, and Status (Active).

11. Complete the following fields:


Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number <b>Example:</b> 40000593


12. Click  (Enter) to validate the information.

13. Click the grey box to the left of  to select.

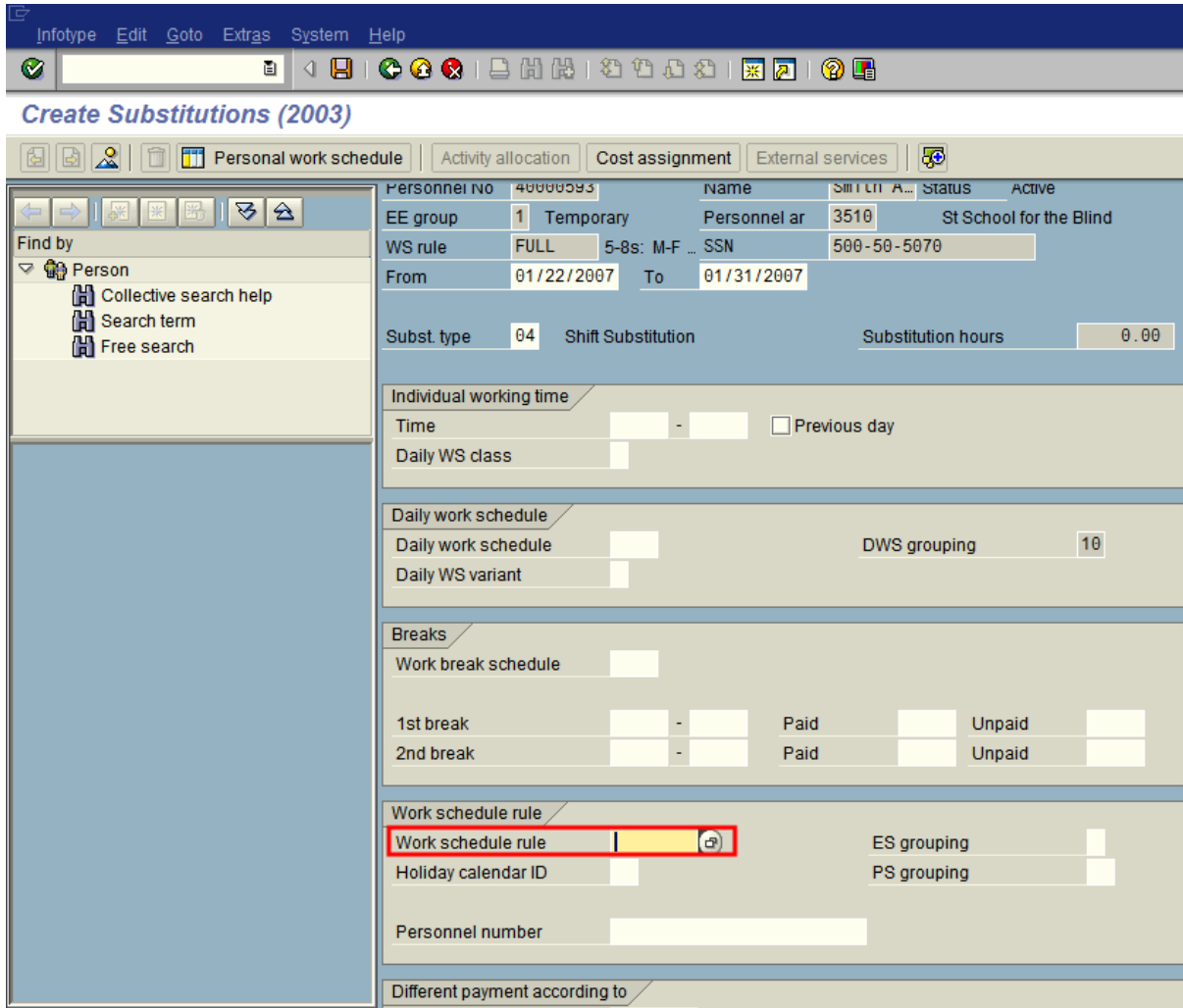
14. Complete the following fields:

Field Name	R/O/C	Description
From.	R	This is the date that substitution beings. <b>Example:</b> 1/22/2007
To	R	This is the date the substitution ends. <b>Example:</b> 1/31/2007

15. Click  (Enter) to validate the information.

16. Click  (Copy) to copy and continue.

**Create Substitutions (2003)**




17. Complete the following fields:

Field Name	R/O/C	Description
Work schedule rule	R	Description of the Work schedule rule. <b>Example:</b> RO17 4-10s T-F, 10hpd



For an **hourly** employee, you will want to change the **Daily Work Schedule** under the **Daily work schedule** tab.


For a **monthly** employee you will want to change the **Work Schedule** under the **Work schedule rule** tab.

18. Click  (Matchcode icon) to open the selection list.

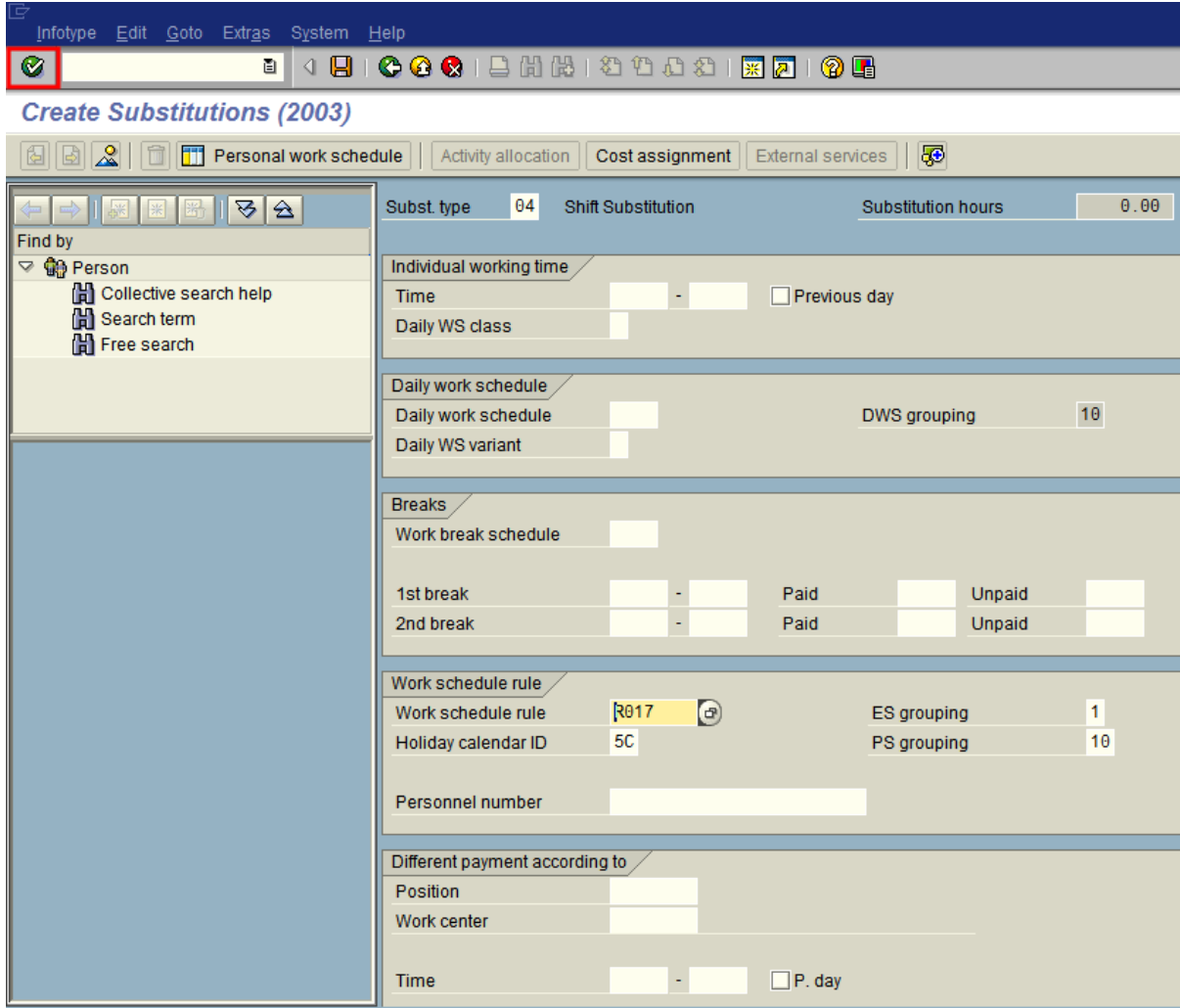
Work Schedule Rule (1) 244 Entries Found


ESG	ID	PSG	WS ru...	Work schedule rule text	PWS	Start Date	End Date
1	5C 10	FULL		5-8s: M-F 8 hpd	P001	01/01/1990	12/31/9999
1	5C 10	R003		5-8s: T-St, 8 hpd	P003	01/01/1990	12/31/9999
1	5C 10	R005		5-8s: W-Sn, 8 hpd	P005	01/01/1990	12/31/9999
1	5C 10	R007		5-8s: Th-M, 8 hpd	P007	01/01/1990	12/31/9999
1	5C 10	R009		5-8s: F-T, 8 hpd	P009	01/01/1990	12/31/9999
1	5C 10	R011		5-8s: St-W, 8 hpd	P011	01/01/1990	12/31/9999
1	5C 10	R013		5-8s: Sn-Th, 8 hpd	P013	01/01/1990	12/31/9999
1	5C 10	R015		4-10s: M-Th, 10 hpd	P015	01/01/1990	12/31/9999
1	5C 10	R017		4-10s: T-F, 10 hpd	P017	01/01/1990	12/31/9999
1	5C 10	R019		4-10s: W-St, 10 hpd	P019	01/01/1990	12/31/9999
1	5C 10	R021		4-10s: Th-Sn, 10 hpd	P021	01/01/1990	12/31/9999
1	5C 10	R023		4-10s: F-M, 10 hpd	P023	01/01/1990	12/31/9999
1	5C 10	R025		4-10s: St-T, 10 hpd	P025	01/01/1990	12/31/9999
1	5C 10	R027		4-10s: Sn-W, 10 hpd	P027	01/01/1990	12/31/9999
1	5C 10	R030		24/7: M-Sn, 24 hpd	P029	01/01/1990	12/31/9999
1	5C 10	R031		4-9s/4: M-Th 9, F 4	P031	01/01/1990	12/31/9999
1	5C 10	R033		4-9s/4: T-F 9, St 4	P033	01/01/1990	12/31/9999
1	5C 10	R035		4-9s/4: W-St 9, Sn 4	P035	01/01/1990	12/31/9999
1	5C 10	R037		4-9s/4: Th-Sn 9, M 4	P037	01/01/1990	12/31/9999
1	5C 10	R039		4-9s/4: F-M 9, T 4	P039	01/01/1990	12/31/9999
1	5C 10	R041		4-9s/4: St-T 9, W 4	P041	01/01/1990	12/31/9999
1	5C 10	R043		4-9s/4: Sn-W 9, Th 4	P043	01/01/1990	12/31/9999
1	5C 10	R045		2Wk:M-Th 9, F 8, 2nd F 0	P045	01/01/1990	12/31/9999
1	5C 10	R047		2Wk: M-Th 9, F 0, 2nd F 8	P047	01/01/1990	12/31/9999
1	5C 10	R049		2Wk: M-F 9, 2nd Th 8, F 0	P049	01/01/1990	12/31/9999
1	5C 10	R051		2Wk: M 8, T-F 9, 2nd M 0	P051	01/01/1990	12/31/9999
1	5C 10	R053		2Wk: M 0, T-F 9, 2nd M 8	P053	01/01/1990	12/31/9999
1	5C 10	R055		2Wk: M-Th 9,F8,2nd M 0,F9	P055	01/01/1990	12/31/9999
1	5C 10	R057		2Wk:M 0,T-F 9,2nd M 9,F 8	P057	01/01/1990	12/31/9999
1	5C 10	R059		2Wk: 1st M-W 9, Th 8, F 0	P059	01/01/1990	12/31/9999
1	5C 10	R228		4-10s: M-T, Th-F 10 hpd	P228	01/01/1990	12/31/9999
1	5C 10	R220		4-10s: M-W-F 10 hpd	P220	01/01/1990	12/31/9999

19. Click **1 5C 10 R017 4-10s: T-F, 10 hpd P017 01/01/1990 12/31/9999** to select.

20. Click  (Continue) to select and continue.

### Create Substitutions (2003)



21. Click  (Enter) to validate the information.

## Copy Substitutions (2003)

Infotype Edit Goto Extras System Help

Personal work schedule Activity allocation Cost assignment External services

Personnel No 40000593 Name Smith Alan  
EE group 1 Temporary Personnel ar 3510 St School for the Blind  
EE subgroup 06 M-OT Elig>40hrs/... SSN 500-50-5070 Status Active  
From 01/22/2007 To 01/31/2007  
Subst. type 04 Shift Substitution Substitution hours 0.00


Individual working time  
Time - Previous day  
Daily WS class

Daily work schedule  
Daily work schedule DWS grouping 10  
Daily WS variant

Breaks  
Work break schedule  
1st break Paid Unpaid  
2nd break Paid Unpaid

Work schedule rule  
Work schedule rule R017 4-10s: T-F, 10 hpd ES grouping 1  
Holiday calendar ID 5C PS grouping 10  
Personnel number

Save your entries RT0 (1)

22. Click  (Save) to save your entries.
23. You have completed the substitution to an employee's normal work schedule rule.

*Title: Work Schedule Substitution*

**Processes :**

**Sub-Processes :**

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HRMS Training Documents

## Comments

After the work schedule substitution is entered, any hours worked or leave taken can be entered using the Cross Application Time sheet (CAT2) for the updated schedule.

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State of Washington HRMS

**File name:** WORK\_SCHEDULE\_SUBSTITUTIO  
N.DOC  
**Reference Number:**

**Version:** SME Approved Script  
**Last Modified:** 1/7/2009 3:42:00 PM

SAP Parent  
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