View Quota Balances in ESS - Employees

Review Quota History Report - SAP WebGUI (PT_QTA10) - Timekeeper or Department Admin

All non-exempt, weekly paid employees can access ESS for their quota balances.

Getting Started

1. From the **BUworks Central portal** click the **Employee Self-Service** tab, **the Working Time** link, and the **Quota Overview** link.
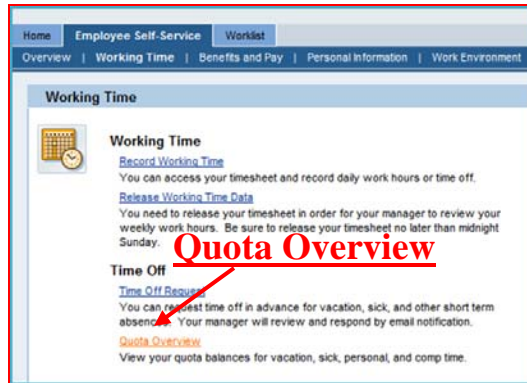
2. Enter the **Key Date** that's under review. You can enter today's date or you can enter a **future** date **if you are projecting what a quota will be**; to review your quota balances, click Display.

Available for use date

Date of expiration.

3. Click **Exit t**o finish.

Absence Quota Information for Concurrent Employment

Menu | | | Save as Variant... | Back | Exit | Cancel | System | Execute | Program Documentation | Sort Or

Period	
Reporting Period	All

Click the **All** entry in the **Reporting Period** field.

Selection Criteria	
Person ID	
Personnel Number	
Employment Status	
Personnel area	
Personnel subarea	
Employee group	
Employee subgroup	
Payroll area	

EITHER select a group of employees from these fields in the **Selection Criteria,** section

OR enter a single **Personnel Number** for one

Use the drop-down menus to choose one or a range of **Quota Types** to review:

Absence Quota Type (1)
Search Criteria
Find...
PS... AQTyp Quota text
1 10 01 Vacation
1 10 02 Sick
1 10 03 Personal day

Quota Selection			
Quota Type		to	
Unit			
Deduction Period	01/01/1800	To	12/31/9999
Key Date for Deduction	10/04/2011		
Key Date for Entitlement	10/04/2011	☐ Projecting Quota Status	

The **Key Date for Deduction** and the **Key Date for Entitlement** default to **today's** date. **If you are determining a future quota balance, enter that date** e.g. employee's anniversary date.

Click the **Execute** button **above** to run the **Absence Quotas** report.

Absence Quotas

Validity Period 01/01/1800 - 12/31/9999

Entitlement is the total hours that have been earned to date since being hired.

Name	Quota	Entitlement	Used	Total Re...
Arnold Berger	Vacation	100.00000	0.00000	100.00000
	Vacation	3.33360	0.00000	3.33360
	Sick	119.00000	0.00000	119.00000
	Sick	4.00000	0.00000	4.00000
	Personal day	100.00000	0.00000	100.00000

Review All Accrual Balances – PT50

View Individual Quotas and Dates Earned

Use this procedure when checking accrual balances:

- Prior to paying out an employee due to separation from the University
- To review when the rate for a vacations or sick time accrual has changed
- To review the awarding of personal days, comp time and additional sick times
- To determine historical detail about accruals such as the date an accrual was granted, was used, or has expired

Getting Started

1. Enter **PT50** in the **SAP Easy Access** transaction field.

2. Hit **Enter.**

3. Enter the **Person ID,** or search by name using the drop-menu, and hit enter.

3. Enter **today's date** in the **Deduction Period** and click **ALL** to view entire accrual history.

4. Click the **Absence quotas** tab to view the total **earned**, **remaining**, and any **approved requested time** by absence quota. This gives you the best summary view.

Quota Overview

| Menu | | Back | Exit | Cancel | System | Update display data | Time evaluation | Projection | Selection |

Person ID	09000291	Pers.Assgn	50050029 Active	
Name	Dan Carter			
Personnel area	1000	Charles River Campu		
EE subgroup	33	Svc & Maint-Trade	WS rule	F08M01N1	8 hour 5 da

| Selection dates | Absence quotas | Accrual information | Attendance quotas |

Totals Line	AbQuotaTyp	Quota text	Unit	Multipl.	Belongs to Assignmt	Entitlmt	Rem.	Requested	Compens.
Σ	01	Vacation	Hours	☐		107.83040	98.83040	4.00000	5.00000
Σ	02	Sick	Hours	☐		120.00000	110.00000	0.00000	10.00000
Σ	03	Personal day	Hours	☐		8.00000	8.00000	0.00000	0.00000
Σ	06	Comp Time-Holiday	Hours	☐		0.00000	0.00000	0.00000	0.00000
Σ	08	Comp Time-Emer C	Hours	☐		7.00000	7.00000	0.00000	0.00000
Σ	09	Floating Holiday	Hours	☐		8.00000	8.00000	0.00000	0.00000
Σ	11	Additional Sick	Hours	☐		16.00000	0.00000	16.00000	0.00000

6. Click the **Accrual Information** button to view the individual quotas as they appeared on the date they were earned.

Print or record the vacation time balance if preparing a payout. **See PA61 process below.**

| Selection dates | Absence quotas | Accrual information | Attendance quotas |

Date	AbQuotaTyp	Quota text	Unit	Generated	Accrued	Transferred	Correct.
01/01/2010	02	Sick	Hours	8.00000	0.00000	8.00000	📄
01/01/2010	09	Floating Holiday	Hours	8.00000	0.00000	8.00000	📄
01/31/2010	01	Vacation	Hours	3.33360	0.00000	3.33360	📄
01/31/2010	02	Sick	Hours	4.00000	0.00000	4.00000	📄
02/28/2010	01	Vacation	Hours	3.33360	0.00000	3.33360	📄
02/28/2010	02	Sick	Hours	4.00000	0.00000	4.00000	📄
03/31/2010	01	Vacation	Hours	6.66640	0.00000	6.66640	📄
03/31/2010	02	Sick	Hours	8.00000	0.00000	8.00000	📄

Process Time Quota Compensation PA61

Review Current Quota Balances and Enter Hours to Compensate Employee

Perform this procedure when you need to process time quota compensation. Vacation quota compensation pay-out occurs:

- After the termination action has been processed
- After all earned hours have posted.
- After Time Evaluation has run

Vacation accruals are to be paid for any hours remaining upon separation from BU.

L2324 members entitled to pro-rated amount of vacation hours no matter when employment ends; all others are credited with hours if the termination date is the 15th of the month or later.

Getting Started

1. Enter **PA61** in the **SAP Easy Access** transaction field.
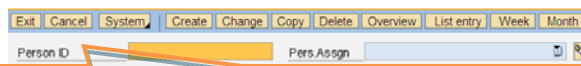
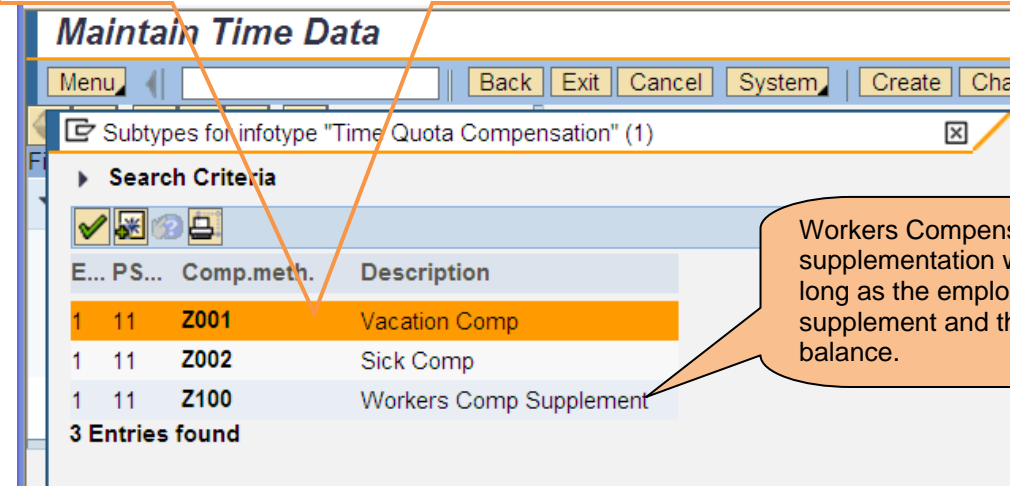2. Enter the **Person ID,** or search by name using the drop-menu and hit **Enter.**
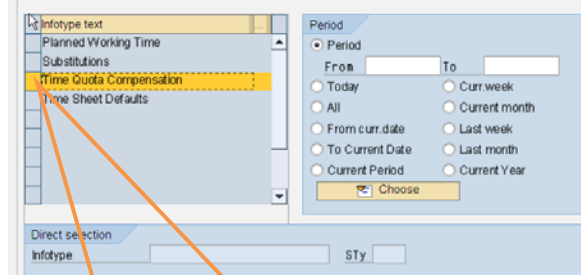
3. Highlight the **Time Quota Compensation** field by clicking the blue box to the left of the title.

4. Click the Create button. **Create**

5. Double-click on **Vacation Comp** to populate the Time Quota Compensation screen.

Maintain Time Data

Subtypes for infotype "Time Quota Compensation" (1)

Search Criteria

E...	PS...	Comp.meth.	Description
1	11	Z001	Vacation Comp
1	11	Z002	Sick Comp
1	11	Z100	Workers Comp Supplement

3 Entries found

> Workers Compensation (WC) supplementation will occur weekly as long as the employee has elected to supplement and there is an available balance.

6. Review the current quota balances and enter the number of hours to compensate the employee.

7. Click the **Save** button.

Create Time Quota Compensation (0416)

Person ID	TMP_00000001	Pers.Assgn	50050001 Active
Personnel No	1	Name	Arnold Berger
EE group	8 Staff-Non Exempt FT	Personnel ar	1000 Charles River Campus
WS rule	F08M01N1 8 hour 5 day	Status	Active
Start	09/26/2011		
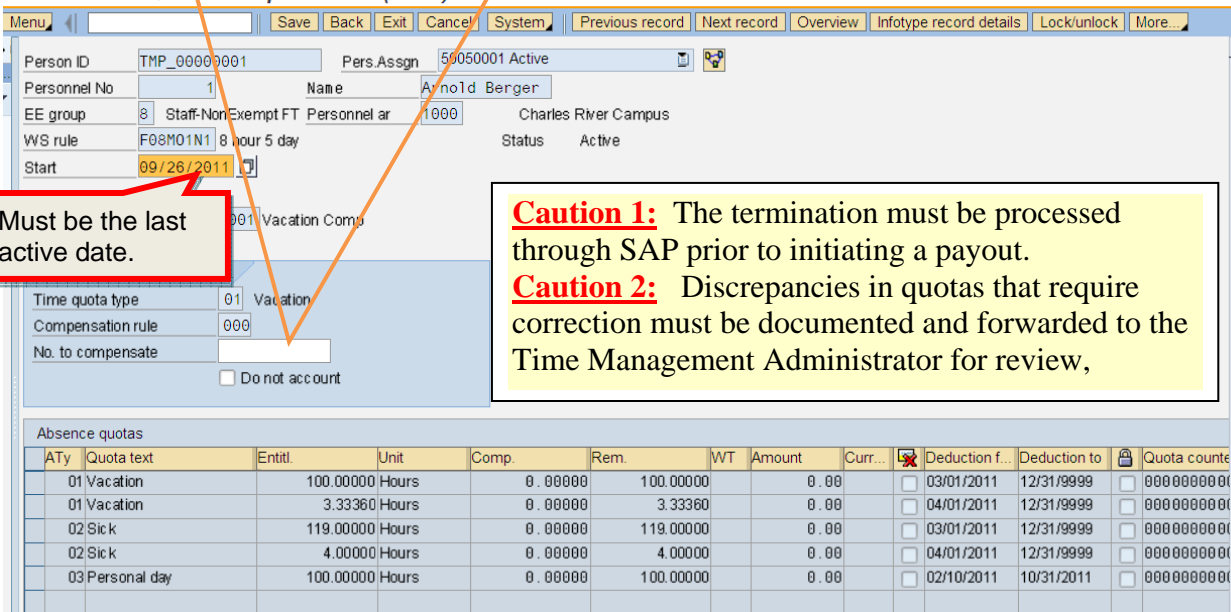
> Must be the last active date.

001 Vacation Comp

Time quota type	01 Vacation
Compensation rule	000
No. to compensate	
☐ Do not account	

Caution 1: The termination must be processed through SAP prior to initiating a payout.
Caution 2: Discrepancies in quotas that require correction must be documented and forwarded to the Time Management Administrator for review,

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.	WT	Amount	Curr...	☒	Deduction f...	Deduction to	🔒	Quota counte
01	Vacation	100.00000	Hours	0.00000	100.00000		0.00		☐	03/01/2011	12/31/9999	☐	0000000000
01	Vacation	3.33360	Hours	0.00000	3.33360		0.00		☐	04/01/2011	12/31/9999	☐	0000000000
02	Sick	119.00000	Hours	0.00000	119.00000		0.00		☐	03/01/2011	12/31/9999	☐	0000000000
02	Sick	4.00000	Hours	0.00000	4.00000		0.00		☐	04/01/2011	12/31/9999	☐	0000000000
03	Personal day	100.00000	Hours	0.00000	100.00000		0.00		☐	02/10/2011	10/31/2011	☐	0000000000