

ERP - PROJECT

SUGAMYA

END USER DOCUMENT

FOR

HCM-PT

Leave and Time Management

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1 DOCUMENT CONTROL

This is a controlled document and will be maintained on UJVNL portal.

Changes to this document will be recorded below and must be published to all interested parties.

1.1 DOCUMENT HISTORY

Version	Date	Author	VERSION DETAILS
V01	16-02-2018	Raghunath Kudkar	First ISSUE

1.2 DISTRIBUTION

Date	Name	Purpose
	Dr Deepsikha Vats	For Information
	Amit Manglik	For Information
	Jeetsingh Rawat	For Information
	Mr Pandey	For Information

2 LEAVE AND ATTENDANCE PROCESSING

2.1 PROCESS NAME

Leaves and Attendance Processing for Company UJVNL.

2.2 OVERVIEW

The Time Management component offers you support in performing all human resources processes involving the planning, recording, and valuation of employees' work performed and absence times.

It encompasses:

- Simple administration of leave and illness times
- Planning of workforce requirements
- Valuation of attendance and absence times for the management of time accounts and determination of overtime and bonus wage types.
- Processing of incentive wage data (for example, extra shift allowance, night shift all.).

SAP Time Management supports

- Online data entry,
- Front-end time recording systems,
- Cross application Time Sheet, and
- Other self-service applications such as Internet, Workflow forms or touch screen systems.

2.3 INTEGRATION

Time Management is embedded in the basic functions of SAP Personnel Administration. The Time Management component is closely integrated in the organizational structure of your enterprise. When working with Time Management, it is therefore essential that you maintain certain master data Infotypes for your employees. One of the most important Infotypes is Organizational Assignment (0001), which contains data on the organizational units to which the employee is assigned within the enterprise (personnel area, employee subgroup, and so on).

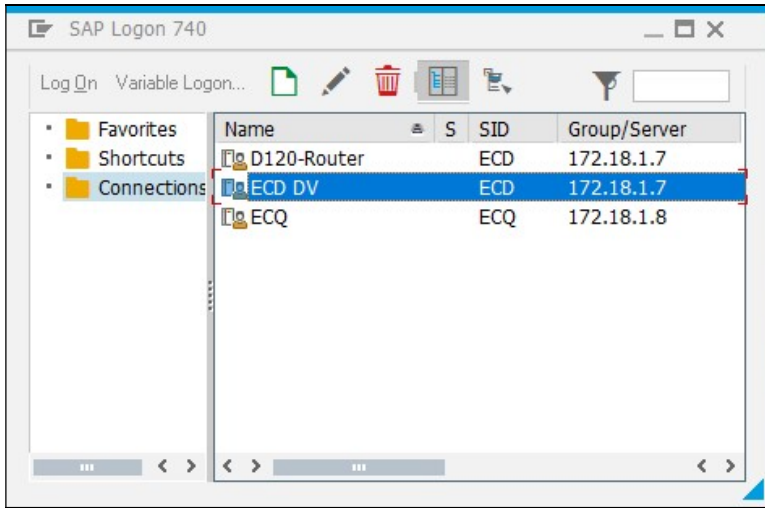
All data is processed in the same way, regardless of the data entry method. Time Management supports centralized data entry by time data administrators, decentralized data entry by production supervisors, for example, or by employees themselves through ESS.

2.4 GETTING STARTED - LOGGING ON TO THE SYSTEM:

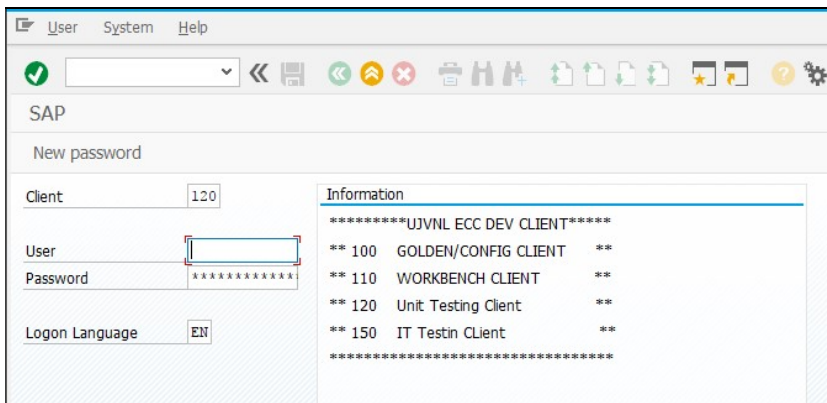
Double click on the following icon on the desktop:



Following screen will open:



Double click on the ECC DV client OR Logon icon and following screen opens:



Enter your user name & password to go to the SAP Easy Access menu:



Click on the (twist) sign and go to Human Resources

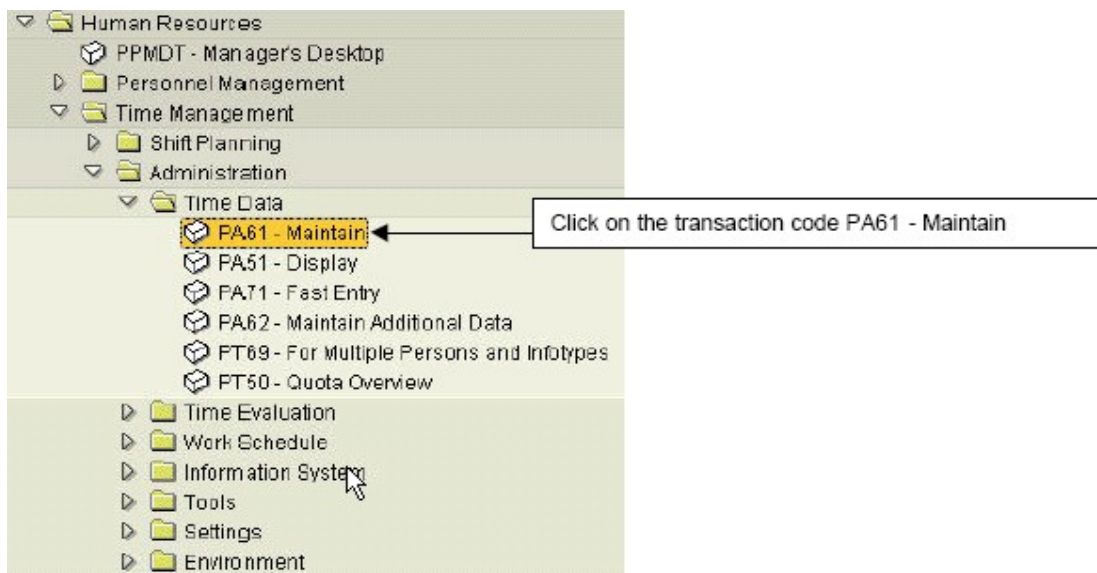
2.5 TIME PROCESSES – MAINTAIN TIME DATA AN OVERVIEW

Through this menu we can undertake the following transaction

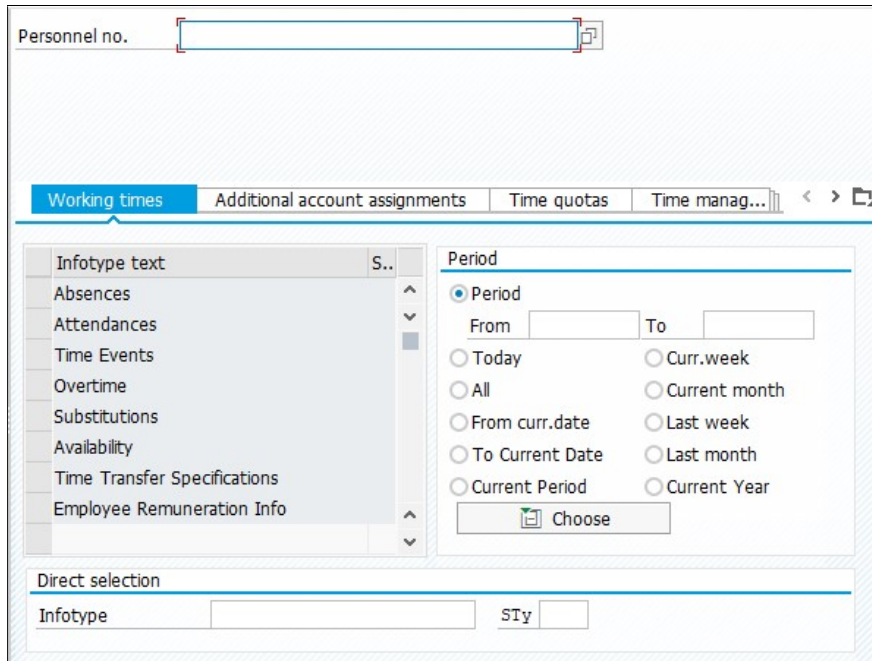
Sr.	Time Process Description	Infotype No.
1	Planned Working Time	0007
2	Time event	2011
3	Absences / Leaves	2001
4	Attendance	2002
5	Substitution	2003
6	Leave Balance	2006
7	Quota Correction	2013
8	Leave Encashment	0416
9	Employee Remuneration	2010
10	Org. Assignment	0001
11	Time recording Information	0050
11	Personal Data	0002

How to Access entry screen ?

Via Menus	Human Resources -> Time Management -> Administration -> Time Data -> PA61
Via Transaction Code	PA61



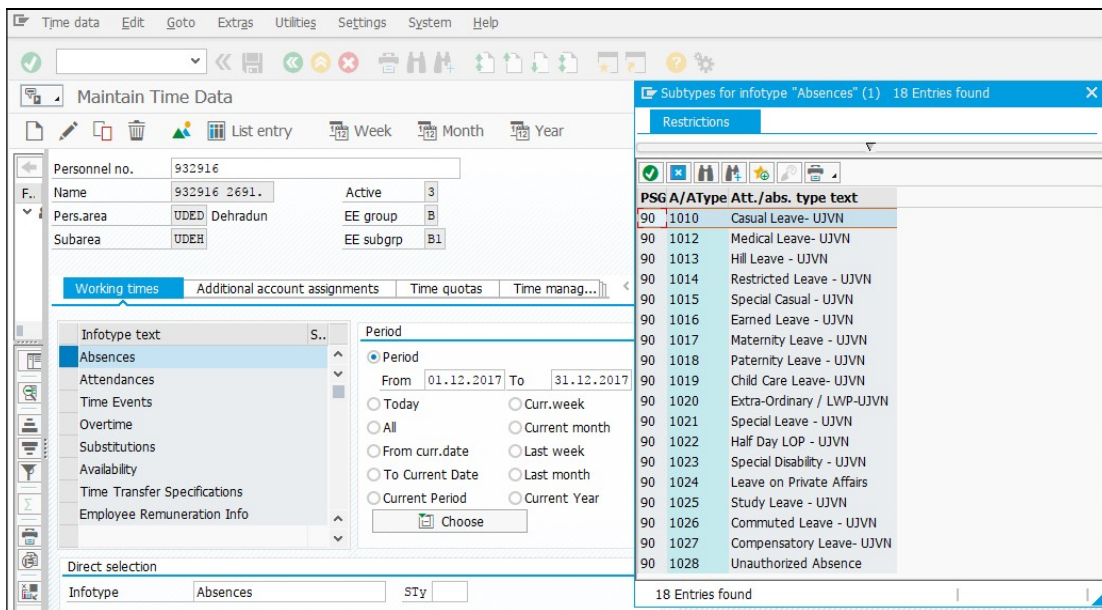
On clicking the Following screen opens up for Maintaining



The above infotype numbers can be entered under Direct selection of Infotype and sub type OR the infotype can be selected from the Time Recording menu.

Specifying the period is a must to go to the relevant infotype. The following screen shot shows how an entry of Employee number and Infotype can be made in PA61 for IT-2001 & 2002

2.6 ABSENCE (LEAVE) & ATTENDANCE ENTRY IT 2001 & 2002



Enter the Employee number and the Infotype number and the system will take you to the desired infotype. Entry of Subtype (Sty) is a must to go to the relevant sub types. Following is the list of Attendance & Absence Subtypes:

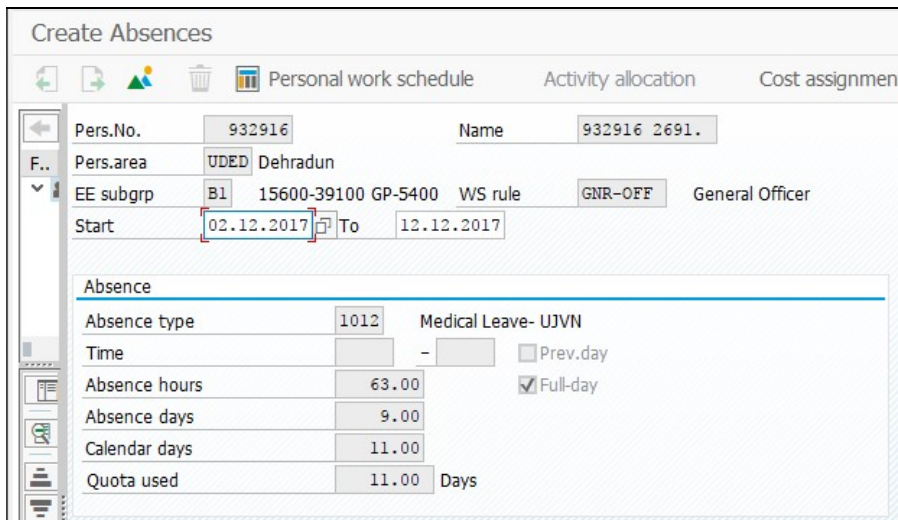
Absence Types with Codes

Sr. No	Absence Type	Code	Sr. No	Absence Type	Code
1	Casual Leave- UJVN	1010	10	Child Care Leave- UJVN	1019
2	Medical Leave- UJVN	1012	11	Extra-Ordinary / LWP-UJVN	1020
3	Hill Leave - UJVN	1013	12	Special Leave - UJVN	1021
4	Restricted Leave - UJVN	1014	13	Half Day LOP - UJVN	1022
5	Special Casual - UJVN	1015	14	Special Disability - UJVN	1023
6	Earned Leave - UJVN	1016	15	Leave on Private Affairs	1024
7	Maternity Leave - UJVN	1017	16	Study Leave – UJVN	1025
8	Paternity Leave - UJVN	1018	17	Commutated Leave - UJVN	1026
9	Compensatory Leave- UJVN	1027	18	Unauthorized Absence	1028

Attendance Types with codes

Sr.No	Attendance Type	Code
1	On-Duty - UJVNL	1031
2	Training - UJVNL	1032
3	CMP Attendance - UJVN	UCMP

Now for E.g. If we want to make an entry of Medical Leave in R/3 directly by entering the leave in IT-2001 – Leave entry Infotype, the following screen shots will specify the same: (Medical Leave for date 02-12-2017 is entered) On entering Employee number and IT-2001, subtype 1012 and selecting period 02.12.2017 to 12.12.2017, following screen opens:



In the above screen enter the timings if required for half day and keep the timings blank to enter the Medical leave for full day – automatically the system will default for entire day. Now SAVE the record by clicking on icon.



Similarly, attendance entries can be made by entering selection infotype 2002 & relevant attendance subtype.

2.7 HOW TO VIEW ENTERED LEAVES / ABSENCES ?

Mention the period for which the attendance / Absence is to be viewed & then press the



Overview icon on which the following screen appears

List Absences

Pers.No. 19 Name Payroll Test

F.. Pers.area UDED Dehradun Cost Ctr 11010701 DGM CSPP0

EE subgrp A1 PB-4+HAG+69010-790... WS rule GNR-OFF General Officer

Choose 01.01.1800 To 31.12.9999 STy.

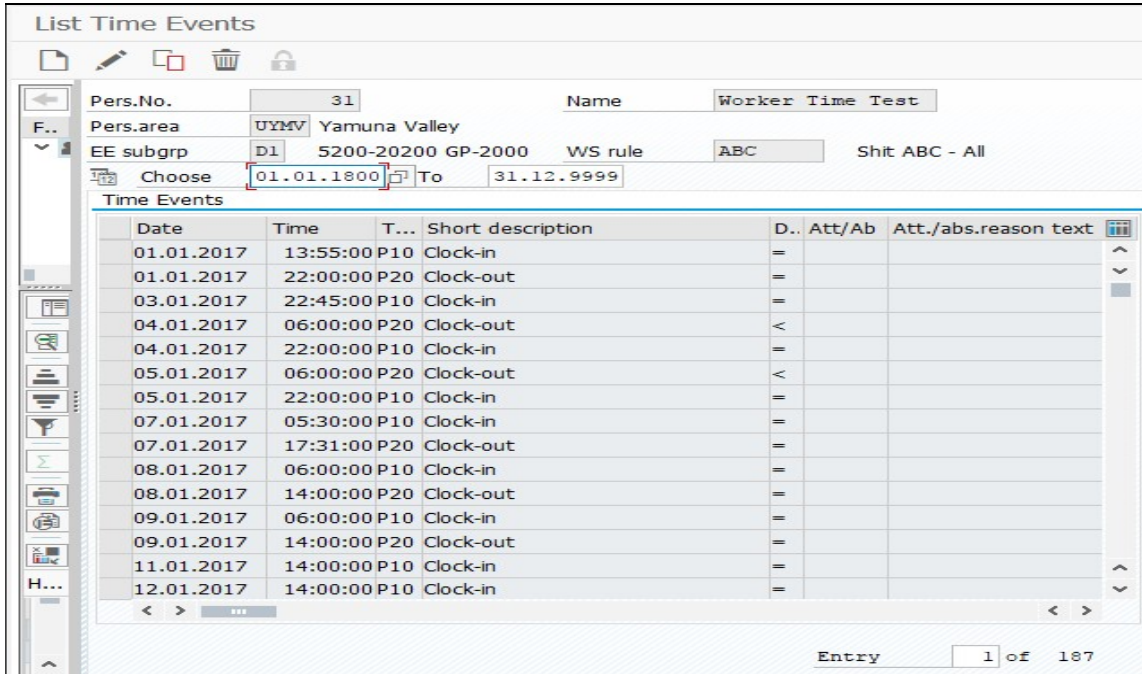
Start Date	End Date	Ab...	Att./abs. type text	From	To	P	Abs.days	Hor
29.12.2017	31.03.2018	1028	Unauthorized Absence				77.00	
03.11.2017	03.12.2017	1020	Extra-Ordinary / LWP-UJVN				26.00	
16.10.2017	21.10.2017	1015	Special Casual - UJVN				6.00	
10.10.2017	11.10.2017	1014	Restricted Leave - UJVN				2.00	
03.08.2017	13.08.2017	1012	Medical Leave- UJVN				9.00	
01.07.2017	20.07.2017	1012	Medical Leave- UJVN				17.00	
10.06.2017	11.06.2017	1014	Restricted Leave - UJVN				1.00	
02.05.2017	10.05.2017	1010	Casual Leave- UJVN				8.00	
10.04.2017	28.04.2017	1028	Unauthorized Absence				17.00	
05.04.2017	06.04.2017	1013	Hill Leave - UJVN				2.00	
27.03.2017	04.04.2017	1012	Medical Leave- UJVN				7.00	
01.01.2017	16.03.2017	1028	Unauthorized Absence				61.00	

The overview will show the start and end date with absence type, absence type text, timings (if entered), total hours, Calendar days, payroll days etc.

2.8 TIME EVENTS (IT2011)

Through this screen we can do the following:

View the captured punch Time “IN” & “OUT” events of an employee. This screen can be accessed by entering 2011 in the selection infotype field OR by selecting the filed “Time Event” from the maintain time data transaction (PA61). Please enter the period for which time data is to be viewed. The following screen appears:





Note :

The Time event type “P10” means “Clock In” & “P20” indicates “Clock Out”.

- # The day attribute “DA” for which day the punch data is being considered
 - = (equal to) means punch’s are for current day
 - < (Less than) means punches are for previous date
 - (minus) means the punches are for previous day done manually
 - + (Plus) means the punch are for Current day done manually

Create / Change time events (punches)

By Clicking on the create  or Change icon  we can add manually new punches or change the existing punches respectively. The following screen would appear:

Pers.No. Name
 Pers.area Dehradun
 EE subgrp 15600-39100 GP-5400 WS rule General Officer
 Date

Time event

Time Enter Time & Event Type
 Time event type
 Day assignment
 Att./absence reason
 Terminal ID
 Origin
 Cust.Field

HH MM SS

: :

Enter the Time & time event type (P10, P20) in the space provided. The day assignment needs to be given if we forcibly want the day assignment of a particular day.

2.9 ABSENCE QUOTA / LEAVE BALANCE(IT2006)

To view the absence quota balances (Leave Balances) go to infotype 2006. By entering 2006 in the direct selection in PA61 the quotas for an employee can be viewed by specifying the desired period e.g for a year enter 01.01.2018 to 31.12.2018. On taking overview - following screen appears:

Pers.No. Name
 Pers.area Dehradun
 EE subgrp 15600-39100 GP-6600 WS rule General Officer
 Choose To STy.

Absence Quotas

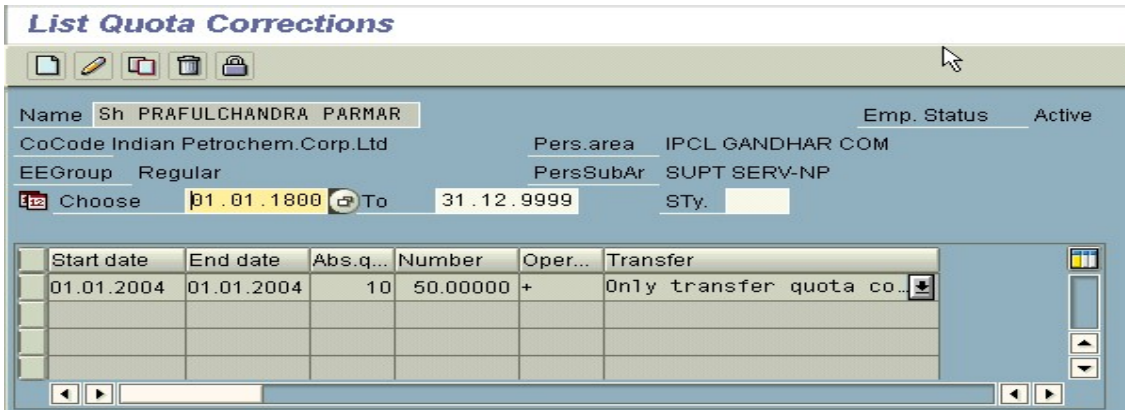
Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction	From	To	L
01.01.2018	31.12.2018	01	Casual Leave - UJVN	01.01.2018	31.12.2018	14.00000	2.00000			
01.01.2018	31.12.2018	04	Hill Leave - UJVN	01.01.2018	31.12.2018	4.00000	0.00000			
01.01.2018	31.12.2018	05	Restricted Leave - UJVN	01.01.2018	31.12.2018	2.00000	0.00000			
19.09.2017	31.12.9999	03	Medical Leave - UJVN	19.09.2017	31.12.9999	120.00000	0.00000			
19.09.2017	31.12.9999	07	Earned Leave - UJVN	19.09.2017	31.12.9999	331.00000	0.00000			

All the quota balances for the given period are displayed with actual deductions (i.e. the leave availed) during the period.



Leave Balances will be created by running Time Evaluation (transaction PT60) which can be scheduled in the back ground.

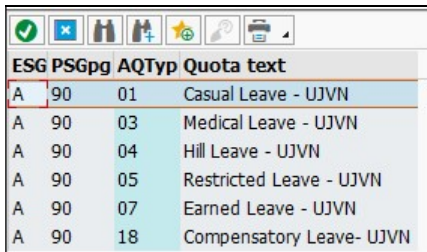
2.10 QUOTA CORRECTION (IT2013)

To view the past Quota Corrections done for an employee (Leave Balances corrections) go to transaction PA61 and enter the infotype 2013 in the selection field. Specify the desired period for which data to be viewed. On taking overview - following screen appears:

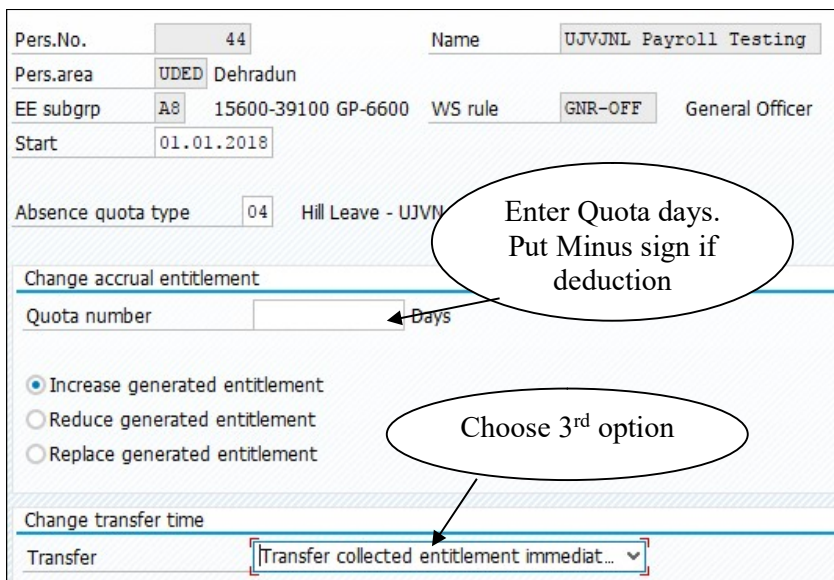


Note : To view only a specific leave type, you can enter the leave subtype.

In case any correction or credit needs to be given, it is done through the Quota Correction Infotype –IT 2013 by the create icon →  or Change icon → . Following screen would appear:



On Choosing the subtype below screen appears



Note : The effect of the quota correction will reflect **only after Time Evaluation is run** for the employee. You can check if quota has been credited in the overview screen as already explained above.

2.11 SUBSTITUTIONS (IT – 2003) : SHIFT CHANGE

Change Substitutions

Name: Sh. PRAFULCHANDRA PARMAR | Emp. Status: Active

CoCode: Indian Petrochem.Corp.Ltd | Pers.area: IPCL GANDHAR COM

EEGroup: Regular | PersSubAr: SUPT SERV-NP

From: 26.01.2004 | To: 26.01.2004 | Chg.: 09.03.2004 | MSHAW

Subst. type: 02 | IPCL Plant Requirement | Substitution hours: 0.00

Individual working time: Time, Daily WS class, Previous day

Daily work schedule: Daily work schedule: W0 | DWS grouping: 53

Breaks: Work break schedule

Enter the new shift

2.12 PLANNED WORKING TIME (IT0007)

Maintaining of IT-0007 is mandatory for time management function to exist. In this infotype

- Work Schedule Rule and
- Time Management status for an employee is stored.

On entering 0007 on the direct selection of infotype the following screen appears:

Pers.No. 19 | Name | Pers.area UDED Dehradun

EE subgrp A1 | PB-4+HAG+69010-790... WS rule

Start 01.12.2017 | To 31.12.9999

Work schedule rule: GNR-OFF | General Officer

Time Mgmt status: 1 - Time evaluation of actual time

Working time: Employment percent 100.00, Daily working hours, Weekly working hours 0.00, Monthly working hrs 0.00, Annual working hours 0.00, Weekly workdays

WS rule	Work schedule rule text	PWS	Start Date	End Date
ABC	Shit ABC - All	ABC	01.01.2000	31.12.9999
BCA	Shit BCA - All	BCA	01.01.2000	31.12.9999
CAB	Shit CAB - All	CAB	01.01.2000	31.12.9999
GNR-OFF	General Officer	GOF7	01.01.2000	31.12.9999
GOP1	Operational General - 1	GOP1	01.01.2000	31.12.9999
GOP2	Operational General - 2	GOP2	01.01.2000	31.12.9999
GOP3	Operational General - 3	GOP3	01.01.2000	31.12.9999
GOP4	Operational General - 4	GOP4	01.01.2000	31.12.9999
GOP5	Operational General - 5	GOP5	01.01.2000	31.12.9999
GOP6	Operational General - 6	GOP6	01.01.2000	31.12.9999
GOP7	Operational General - 7	GOP7	01.01.2000	31.12.9999

Restrictions dialog: 11 Entries found

Note: Never Overwrite on existing Work Schedule Rule. Always Copy the existing & change to the new Rule from date – to date

Work Schedule Rule: - The work schedule rule determines which period work schedule is used to set up the work schedule, and the day of the period as of which it applies.

The list of Work Schedule rules is attached under for reference.

ESG	ESG TEXT	CALEN DAR	TEXT	Grouping	WS Rule	Description
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	ABC	Shit ABC – All
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	BCA	Shit BCA – All
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	CAB	Shit CAB – All
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	GNR-OFF	General Officer
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	GOP1	Operational General – 1
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	GOP2	Operational General – 2
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	GOP3	Operational General – 3
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	GOP4	Operational General – 4
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	GOP5	Operational General – 5
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	GOP6	Operational General – 6
A	UJVN-Employees	UJ	UJVN - Holiday Calendar	90	GOP7	Operational General – 7

Period Work Schedule: - The period work schedule defines an employee's working hours for a specific period (e.g. week) and specifies how the hours are distributed. It is made up of a sequence of daily work schedule and sets a working pattern, which is repeated each period. One character is provided for each day of the period. The period work schedule is used to generate a monthly work schedule.

Grouping	PWS Rule	Description	Grouping	PWS Rule	Description
90	ABC	Shit ABC – All	90	GOP3	Operational General – 3
90	BCA	Shit BCA – All	90	GOP4	Operational General – 4
90	CAB	Shit CAB – All	90	GOP5	Operational General – 5
90	GOF7	General Officer	90	GOP6	Operational General – 6
90	GOP1	Operational General – 1	90	GOP7	Operational General – 7
90	GOP2	Operational General – 2			

Time Management Status: - The Time Management status indicator is assigned to employees who take part in time evaluation. It controls selection parameters for the time evaluation report RPTIME00. You can use the indicator to trigger different types of processing in time evaluation. You must enter a Time Management status in this field to indicate whether or not the employee participates in time evaluation. We must keep the indicator as **“Time evaluation actual”**.

Here an employee's actual times are recorded and he/she participates in time evaluation.

Example:

- The employee's actual times are recorded at a time recording terminal.
- The employee's actual times are recorded in the Attendances infotype (2002).

2.13 TIME MANAGEMENT INFORMATION (IT0050)

For all the employees with Time Management Status 1 i.e. Time Evaluation (Actual Time Recording), maintaining of IT-0050 Time Management Info is mandatory. On entering 0050 in the direct selection of infotype the following screen appears:

Time recording ID number: This field contains the ID number for time recording. When you enter the number, the system checks that the same number does not exist already. (Same ID number cannot be assigned to two employees.)

2.14 QUOTA COMPENSATION / LEAVE ENCASHMENT (IT0416)

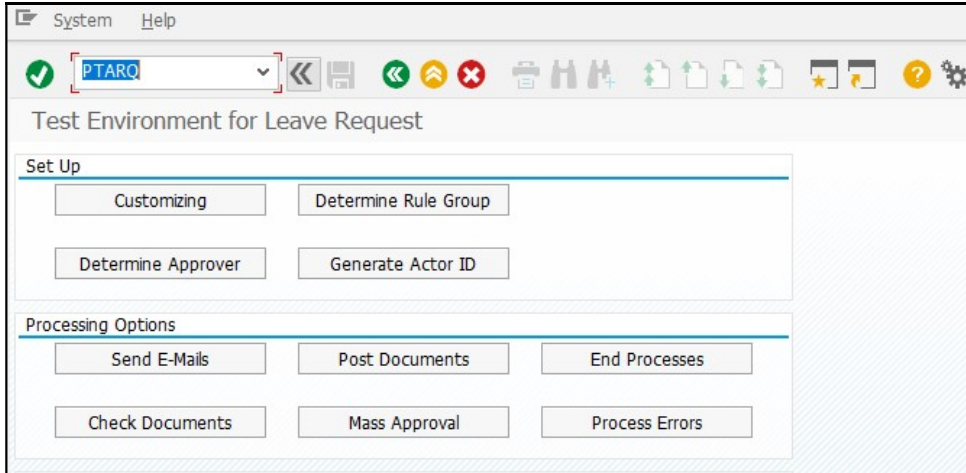
To enter Quota Compensation (i.e Leave encashment) enter 0416 infotype in the direct selection of infotype in transaction PA61. Enter / Choose the subtype (e.g. EL). Following screen appears for the encashment of PL:

ATy	Quota text	EntitL	Unit	Comp.	Rem.	WT	Amount	Curr...	Deduction...	Deduction...
01	Casual Leave - UJVN	14.00000	Days	0.00000	14.00000		0.00		01.01.2018	31.12.2018
03	Medical Leave - UJVN	120.00000	Days	0.00000	120.00000		0.00		01.12.2017	31.12.9999
04	Hill Leave - UJVN	4.00000	Days	0.00000	4.00000		0.00		01.01.2018	31.12.2018
05	Restricted Leave - UJVN	2.00000	Days	0.00000	2.00000		0.00		01.01.2018	31.12.2018
07	Earned Leave - UJVN	240.00000	Days	0.00000	240.00000		0.00		01.01.2017	31.12.9999
07	Earned Leave - UJVN	31.00000	Days	0.00000	31.00000		0.00		01.01.2018	31.12.9999

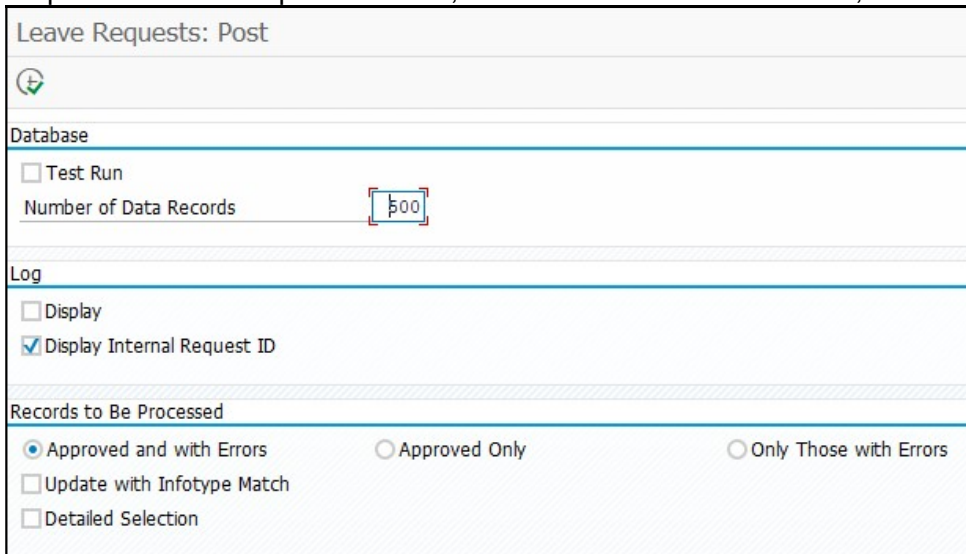
2.15 LEAVE / ATTENDANCE REQUEST FROM ESS PORTAL

Employee can apply for Leave or Attendance through ESS and get it approved by respected Approvers on MSS. These type of Leave and Attendance need to be updated in SAP system on approval. To update these requests, following Transaction / Program to be scheduled:

Transaction Code: **PTARQ**



To post the Leave requests in SAP, click on Post Document button, following screen will appear:



Click on Execute button to update the approved leave requests in Infotype 2001.

2.16 PROCESSED TIME REPORT AND APPROVAL

Run transaction ZHRPT_MONTHLY_ATTEND, you will get following selection screen.

Time Monthly Attendance Report

Period

Today
 Current month
 Current year

Up to today
 From today

Other period

Period: To:

Payroll period:

Selection

Personnel Number:

Employment status:

Personnel area:

Personnel subarea:

Selection Criteria

Start Date:

End Date:

Select Report Status:

 New

 Approved Reports

On clicking on Execute button, system will give following output:

Time Monthly Attendance Report

Report Generated on: 20180220

Report Status :

Pers.No.	Start Date	End Date	Status	Version	02. Januar	03. Januar	04. Januar	05. Januar	06. Januar	07. Januar	08. Januar	09. Januar	10. Januar	11. Januar	12. Januar	13. Januar	14. Januar	15. Januar	16. Januar	17. Januar	18. Januar	19. Januar
31	01.01.2017	31.01.2017	1	5	OFF	LWP	P	LWP	OFF	P	P	P	OFF	LWP	P	P	PH	P	P	LWP	OFF	P

By selecting “Send for Approval” button, records will be send for Manager’s approval.

Manager / Time administrator will approve the same and updates the LWP days for the month.

-: The End :-