


Slide 1 - Title Slide

The slide features a dark blue background with a glowing network of white nodes and lines. Scattered throughout are binary digits (0s and 1s) and soft, out-of-focus bokeh lights in shades of blue, yellow, and purple. The text is centered and presented in a clean, sans-serif font.

Human Resources Overview (HR_200)

Presented by Enterprise Applications Training

 UK Information
Technology Services

Slide 2 - Audio Information

Audio

This training course includes audio.
Ensure your speakers or headset volume is adjusted accordingly.



Slide 3 - CC Information

Closed Captioning

Closed Captioning is included in this training course and will be displayed at the bottom of each slide by default.



To turn it off, click on the Closed Captioning icon in the playbar below.

Slide 4 - Slide 4

Course Content

Unit 1: HR Introduction

Unit 2: Organizational Management

Unit 3: Personnel Administration

Unit 4: Time Management

Unit 5: Payroll

Unit 6: Reporting



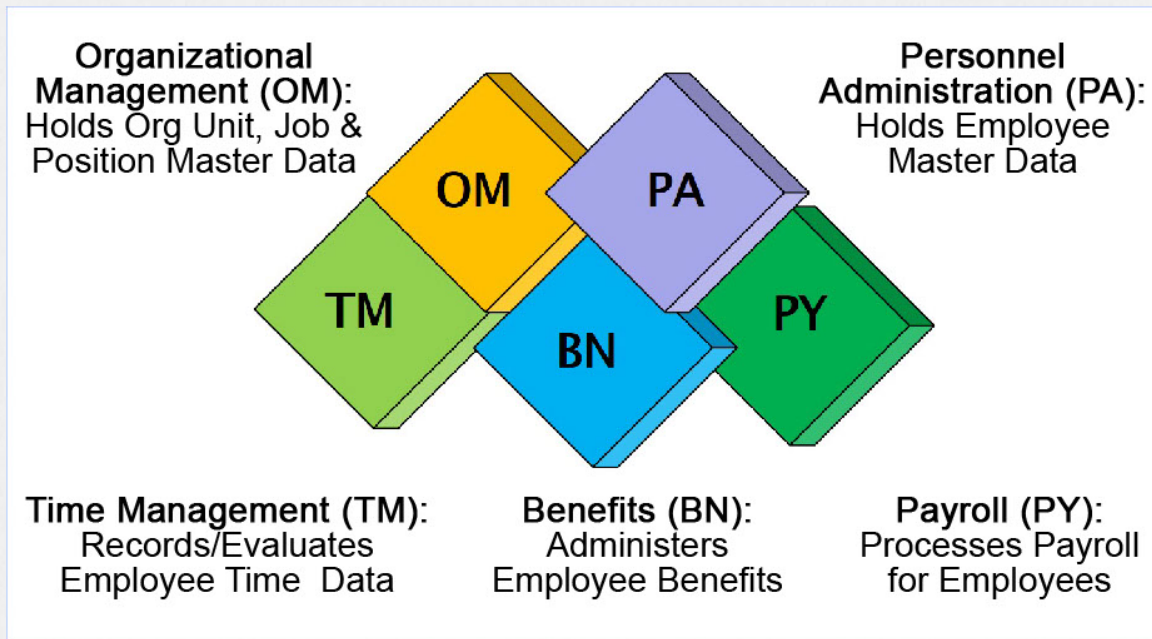
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Unit 1: HR Introduction



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HR Components



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HR Master Data

Information from each HR component contributes to create employee master data.



Integration Across SAP

HR/Payroll data integrates with other SAP modules.

- If an employee is also a student, the Person ID and the Student Number will be the same.
- Changes to an employee's master data record may affect salary and benefit encumbrances in FM.
- Payroll is charged to cost objects in FI and GM.
- PPD and Housing employee time is transferred from Time Management to PM Work Orders.



SAP HR Data Types

Human Resources and Payroll data includes:

Master Data

- Organizational Management (OM)
 - Includes information about the Enterprise Structure
 - Examples: Organizational Units, positions
- Personnel Administration (PA)
 - Refers to employee information
 - Examples: Name, addresses, pay rates

Transactional Data

- Entered as needed to support SAP updates to master data
- Examples: Time entry, creation of new positions

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HR Security Access

Access to employee master data and certain transactions will be based on your SAP-HR security role. For example:

- If you are responsible for creating faculty and temporary positions in your department, you will have access to your department's position data and position transaction codes.
- If you are responsible for creating and maintaining employee data in your department, you will have access to the employee master data for your department and employee master data transaction codes.
- If you are responsible for administering employee time in your department, you will have access to the employees in your department and the time processing transaction codes.

All training must be successfully completed for a role prior to receiving access. The list of required courses will be listed in parenthesis next to your HR role(s) in your IRIS Training Plan.

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Unit 2: Organizational Management



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Organizational Management Objects

Organizational Management (OM) objects:

- are created to maintain the Enterprise Structure of the system;
- allow classification according to features and types of information and arrangement into categories; and
- link to other objects, establishing relationships between objects and the inheritance of attributes.

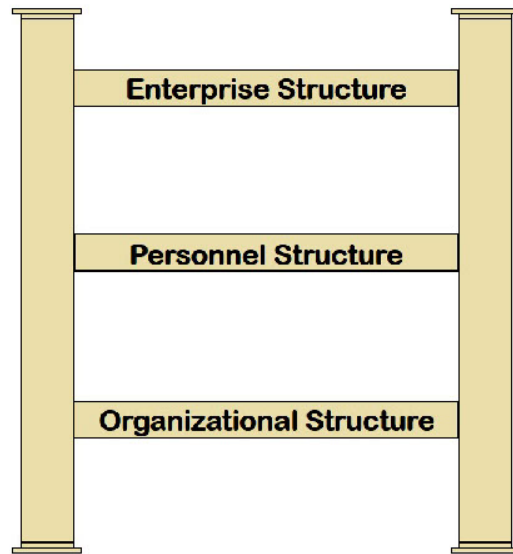
OM objects include:

- **Organizational Units** - such as Housing, Biology, College of Nursing
- **Jobs** - such as Regular Faculty, Programmer, Coach
- **Positions** - such as Staff Support Associate I, Professor, Student/Non-Work Study

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Foundation Structures

There are three structural concepts within SAP that are used to build the HR view of an employee.

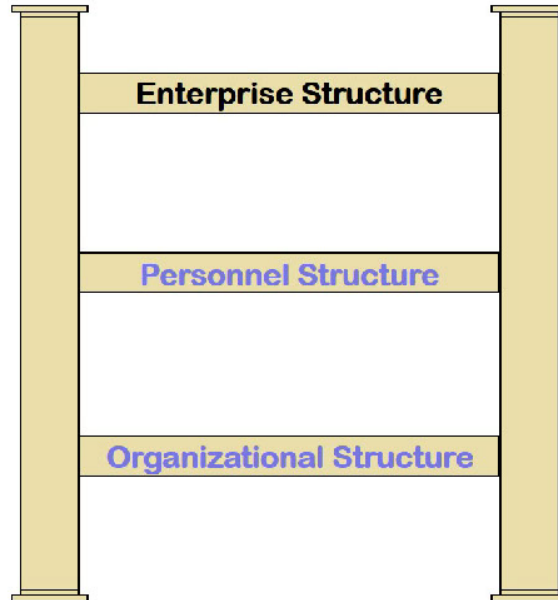


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Enterprise Structure

The Enterprise Structure:

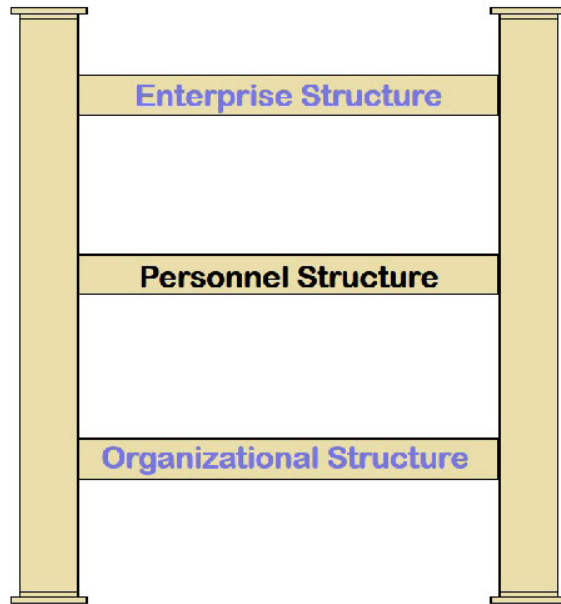
- establishes UK's structure of organizations, positions and people data;
- provides default values for data entry, selection criteria for reporting and authorization/security verification data; and
- determines:
 - Company Code
 - Personnel Areas
 - Personnel Subareas



Personnel Structure

The Personnel Structure:

- defines employee types;
- provides default values for data entry, selection criteria for reporting and enforcing the authorization, security and verification data; and
- includes:
 - Employee Groups
 - Employee Subgroups
 - Payroll Areas

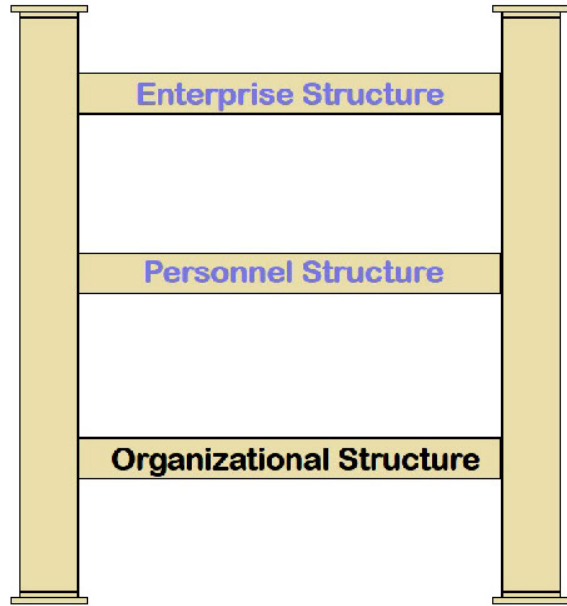


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Organizational Structure

The Organizational Structure:

- defines the hierarchical relationship between Organizational Management objects;
- provides a comprehensive and dynamic model of UK's structure that serves as the foundation of Organizational Management; and
- includes:
 - Organizational Units
 - Jobs
 - Positions



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Jobs vs. Positions

Jobs:

- are created and maintained by HR Compensation;
- provide general classification of tasks routinely performed together; and
- establish an EEO category, job group, and pay grade.

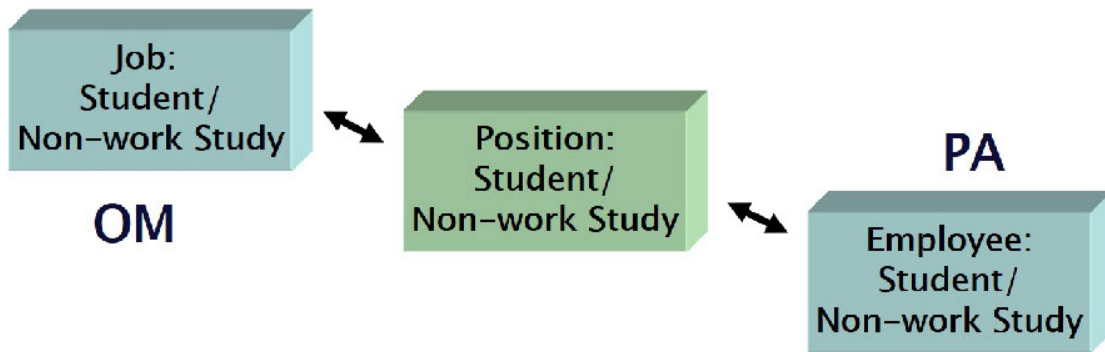
Positions:

- are created and maintained by HR Compensation (regular staff positions) and College/Departmental Business Officers (faculty, temporary, and student positions);
- inherit attributes from the established job; and
- are assigned relationships to a specific department and (unless vacant), a specific employee or pool of employees.

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Integration Point: Position

The integration point between the job (Organizational Management (OM)) and the employee (Personnel Administration (PA)) is the position.

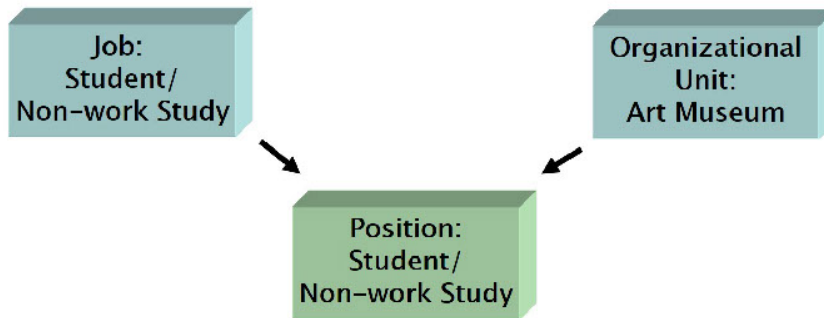


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Relationships

Positions inherit relationships from:

- a Job, which defines the EEO category, job group, and pay grade;
- AND
- an Organizational Unit, which defines the reporting structure as a one-dimensional hierarchy.

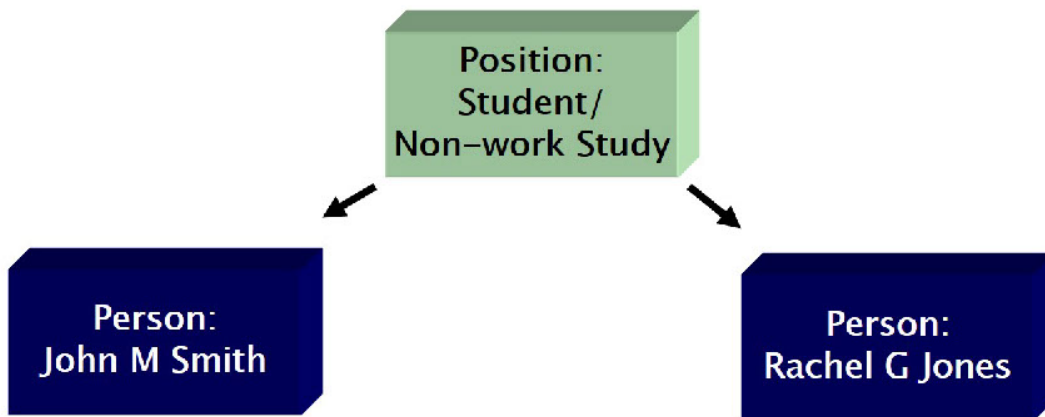


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Relationships (Continued)

Positions have a relationship to a person or a pool of people who “hold” the position.

A relationship record is automatically added by SAP when a hiring action is created using the position.



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Unit 3: Personnel Administration



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Personnel Administration

The Personnel Administration (PA) component is used to process and maintain employee information.

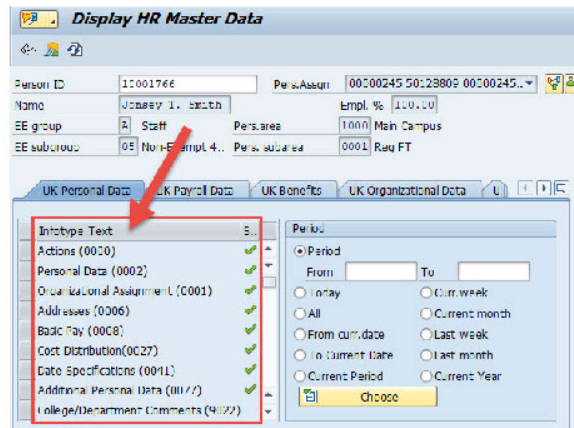


Infotypes

The personnel master data, time management and related data fields are grouped together as **Infotypes** according to logical aspects.

Examples include:

- Actions (0000)
- Personal Data (0002)
- Organizational Assignment (0001)
- Addresses (0006)
- Basic Pay (0008)
- Residence Status (0094)
- Absences (2001)
- Attendances (2002)



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Validity Dates

Each Infotype record requires a start and end date to identify a validity period.

Current records are identified with an end date of 12/31/9999 (referred to as the "high date").

Previous records will show the date they were started and the date they were delimited (ended).

Display Addresses (0006)

Person ID: 10001766 Pers.Assgn: 00000245 50128809 00000245..

Name: Jonsey I. Smith Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

EE subgroup: 05 Non-Exempt 4... Pers. subarea: 0001 FT

Start: 08/01/2020 to: 12/31/9999 Onsig: 08/10/2020 KREAGER

Address

Address type: 1 Permanent residence

Care Of: 30000358

Address Line 1: 123 Main St.

Address Line 2:

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Employee Master Data

The Personnel Administration transaction codes provide access to employee master data.

- **PA20** is used to display employee records and is the preferred transaction code, since it allows multiple users to access the same employee record at the same time.
- **PA30** is used to make changes to employee records, such as address changes or cost distribution changes. However, records are locked to prevent other users from accessing data while it is being changed, unless they use PA20.
- **PA40** is used to create actions for an employee, such as hiring a new employee, changing an employee's position, or changing base salary. Records are locked from access by other users, unless they use PA20.

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Search Tips

To pull up an employee's records, enter the employee's **Person ID** in the Person ID field (if known) and press **Enter**.

Person ID

You can search for an employee's **Person ID** (if unknown) one of two ways:

- By Name
 - Type `=LastName.FirstName` in the **Person ID** field and press **Enter**

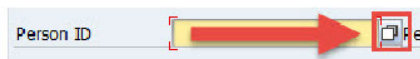
Person ID

- If only one employee matches what you have entered, the employee's records will open immediately.
- If more than one employee matches, a pop-up window will appear listing all matches. Double-click on the desired name to select and open their records.

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Search Tips (Continued)

- By using the **Possible Entries** icon
 - By Last Name and/or First Name
 - By Social Security Number in the ID Number field



Remember: Once the **Person ID** field has been completed, you must always press the **Enter** key in order to retrieve the employee's master data records.

A screenshot of a web application window titled "External Person ID (1)". The window contains a search form with the following fields: Last name, First name, Person ID, Personnel number, Personnel area, Personnel subarea, Employee group, Employee subgroup, Company Code, Cost Center, Organizational unit, Organizational key, and ID number. Red boxes highlight the "Last name" and "First name" fields at the top, and the "ID number" field at the bottom. Two red arrows point from the "ID number" field towards the "Last name" and "First name" fields, indicating a search path.



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Employee Information

The Employee Information section, always seen at the top of the screen, provides basic employee master data.

It displays the following data:

- Person ID
- Personnel Assignment Info (Personnel Number, Position Number, Status)
- Name
- FTE (Full-Time Equivalency) (Empl. %)
- Employee Group/Subgroup
- Personnel Area/Subarea

Person ID	10001766	Pers.Assgn	00000245 50128809 00000245...	 
Name	Jonsey T. Smith	Empl. %	100.00	
EE group	A Staff	Pers.area	1000 Main Campus	
EE subgroup	05 Non-Exempt 4...	Pers. subarea	0001 Reg FT	



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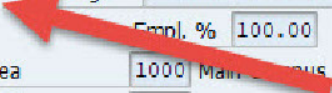
Person ID

The **Person ID** is a unique, eight-digit number for each employee, which is assigned automatically during the New Hire action.

An employee will retain this number even if they:

- change positions;
- take on additional/overload assignments; and/or
- separate from UK and then are rehired/reinstated at a later date (as long as the University is still using SAP).

Person ID	10001766	Pers. Assgn	00000245 50128809 00000245...	 
Name	Jonsey I. Smith	Emp. %	100.00	
EE group	A Staff	Pers.area	1000 Main Campus	
EE subgroup	05 Non-Exempt 4...	Pers. subarea	0001 Reg FT	



Personnel Assignment

The **Personnel Assignment** field information describes the relationship between the employee and their position assignment(s).

Person ID	10001766	Pers.Assgn	00000245 50128809 00000245...
Name	Sherry L. Smith	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	05 Non-Exempt 4...	Pers. subarea	0001 Reg FT

This field contains the following values for each assignment:

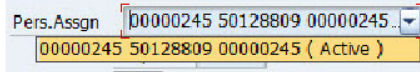
- Personnel Number ("PerNr") (Unique number for each assignment)
- Position Number
- Assignment Status (Active, Inactive, Withdrawn)

Pers.Assgn	00000245 50128809 00000245 ...
	00000245 50128809 00000245 (Active)
	PerNr Position Number PerNr Status

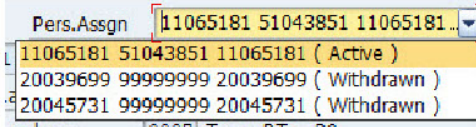
Personnel Assignment (Continued)

Upon clicking in the Personnel Assignment field, a drop-down box will appear listing all of the employee's assignments.

An employee could have just one assignment...



...or they could have multiple assignments. In this example, the employee has one Active assignment and two in which they no longer work. (SAP keeps a history of all assignments in this field.)



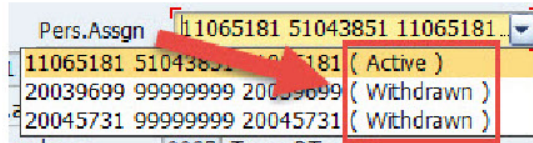
Any time an employee assumes an additional or overload assignment, a new assignment row is established with a new, unique PerNr.

If an employee has only one, main, Active assignment and they transfer to another position, they will retain the same PerNr. A new assignment row is not created. What is different will be the Position Number.

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Assignment Status

The word in parenthesis in a Personnel Assignment's row indicates the assignment's status.



Pers.Assgn	11065181 51043851 11065181
11065181 51043851 11065181	(Active)
20039699 99999999 20039699	(Withdrawn)
20045731 99999999 20045731	(Withdrawn)

- **Active**
 - The employee is currently working in this assignment.
- **Inactive**
 - The employee is still hired in this position, but they are currently not working.
 - For example, the employee could be on FMLA or a retired employee receiving benefits.
- **Withdrawn**
 - The employee is no longer working in this assignment.
 - The Position Number will be **99999999**, but the PerNr will remain.

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Personnel Assignment (Continued)

If an employee has multiple Active assignments and you are unsure which data goes with which assignment, click on the **Assignment Overview** icon to the right of the field to see additional information, such as the **Org. Unit** (Department).

The screenshot shows a software interface with a list of personnel assignments and a detailed overview window. The list has three rows:

Pers. Assgn		
20032400	50122416	20032400 (Active)
20047830	99999999	20047830 (Withdrawn)
20064489	51042751	20064489 (Active)

The 'Personnel assignment overview' window displays the following data:

Personnel assignment	Position	Org. Unit
50122416 20032400 (Active)	Student/Non-Work Study	Undergraduate Admissions
51042751 20064489 (Active)	Student/Non-Work Study	Department of Health, Behavior
99999999 20047830 (Withdrawn)	Integration: default position	Plant and Soil Sciences

Personnel Assignment (Continued)

The key thing to understand about the data in the Personnel Assignment field is that it represents the assignment's information that is down in the Infotypes.

Before looking at and/or making any changes to an employee's master data, always make sure the correct Personnel Assignment's information is seen in the field!

- If that data does **not** represent the correct assignment, then you must click in the field (to obtain the drop-down list) and then click on the correct assignment's row.
 - That row's data will then appear in the field, and all of the records in the Infotypes will update to be the data associated with this assignment.

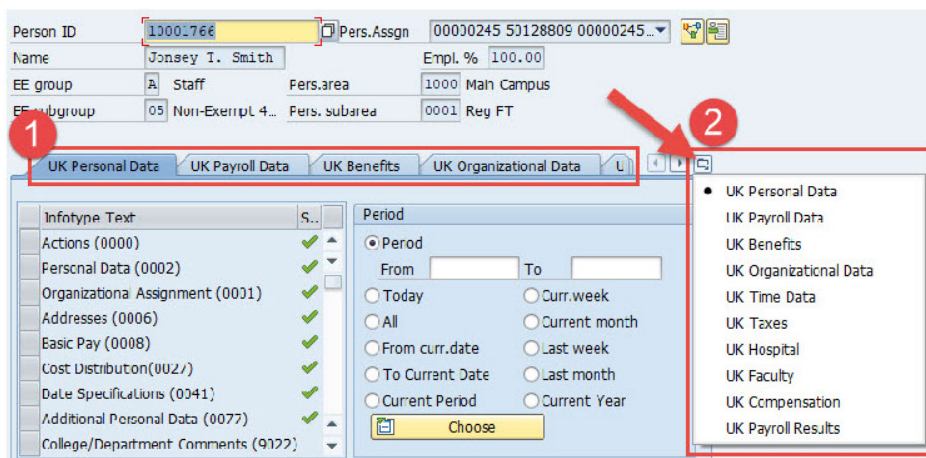


Failing to select the correct Personnel Assignment will result in you seeing and/or making changes to the incorrect assignment!

Accessing Employee Infotypes: PA20

Infotypes are categorized and listed under tabs.

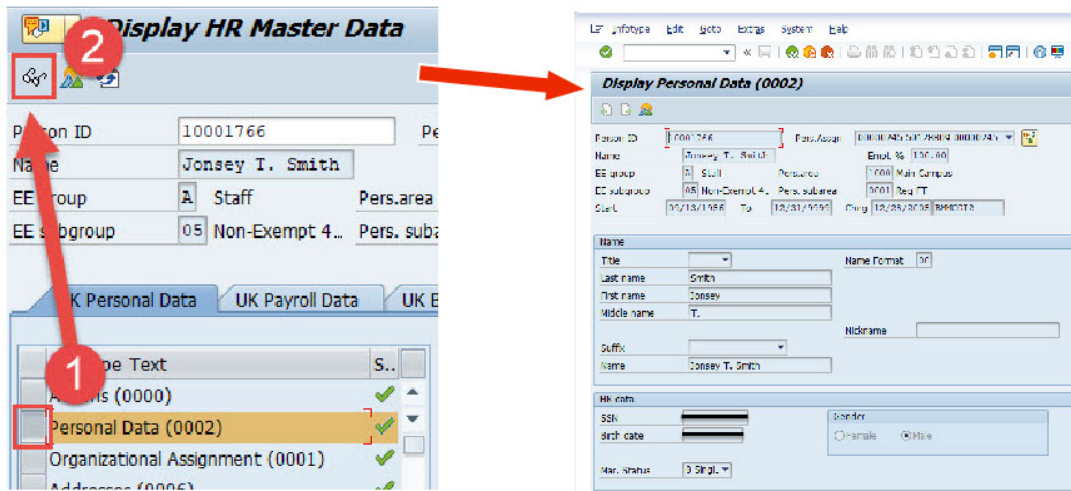
To select a tab, click directly on it (1) or click on the Tab List icon (2), and then click on the desired tab's name in the drop-down list.



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Infotype Selection

To display the current (or last) record for an Infotype, click on the gray Selection icon to the left of the Infotype (1) (the Infotype will be highlighted gold), and then click on the Display icon in the Application Toolbar (2).



Infotype Selection (Continued)

You can also view a summarized listing of all the records for an Infotype.

Click on the **Selection** icon to the left of the desired Infotype (1), and then click on the **Overview** icon in the Application Toolbar (2).

The screenshot shows two windows from an HR system. The left window is titled "Display HR Master Data" and shows a list of infotypes on the left side. The right window is titled "Overview Addresses (0006)" and shows a table of address records.

Annotations in the image include:

- A red box labeled "1" around the "Addresses (0006)" entry in the left window's infotype list.
- A red box labeled "2" around the "Overview" icon in the top toolbar of the left window.
- A red arrow pointing from the "Overview" icon in the left window to the "Overview Addresses (0006)" window.
- A red box labeled "1" around the first record in the "Overview Addresses (0006)" table.
- A red box labeled "2" around the "Overview" icon in the top toolbar of the right window.

The "Overview Addresses (0006)" table contains the following data:

STy.	Start Date	Address	Telephone no.	LI	2nd address line
1	08/01/2020	123 Main St.	8591234567		
1	01/01/2000	8798 Hemmingway Ct.	8592669734		

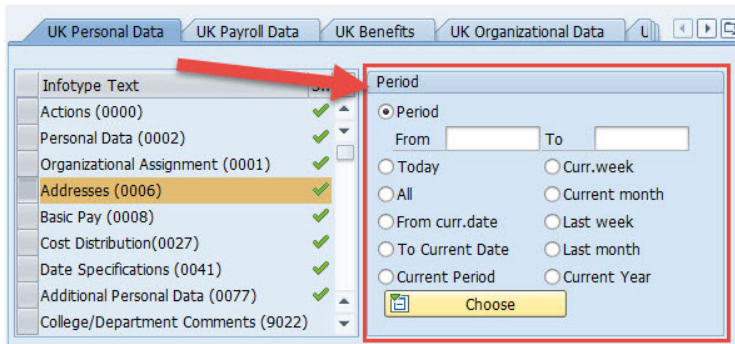
To view the full screen for the first of these two records, select the desired record (1), and then click on the **Choose** icon in the Application Toolbar (2).

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Period Selection

The **Period** section can be used to expand or limit (filter) the number of records viewed. For example:

- If you want to view all the records within an infotype, you would select **All**.
- If you want to view just the current records, you would select **Today**.



The screenshot shows the SAP system interface with the 'Period' dialog box open. The dialog box is titled 'Period' and has a 'Choose' button at the bottom. The 'Period' section is highlighted with a red box, and a red arrow points to the 'All' radio button. The 'All' radio button is selected. The 'Choose' button is visible at the bottom of the dialog box.

The default **Period** with no **From** and **To** dates is the same as **All**.

Be sure to select the desired **Infotype** and **Period** prior to clicking on either the **Display** or **Overview** icon.

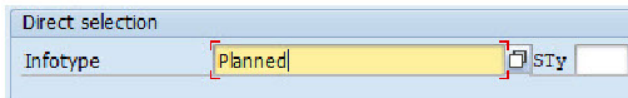
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Direct Selection

By using the **Direct selection - Infotype** field at the bottom of the master data record screen, you can move directly into an Infotype without clicking around on the tabs to find it. This is optional!

To use this field:

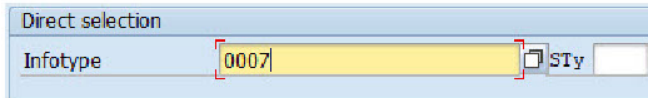
- type the name (or part of the name) in the **Infotype** field and press **Enter**,



A screenshot of a software interface titled "Direct selection". It features a text input field labeled "Infotype" containing the word "Planned". To the right of the input field is a small icon of a document with a checkmark and the label "STy".

OR

- enter the Infotype's four-digit number into the field and press **Enter**.



A screenshot of a software interface titled "Direct selection". It features a text input field labeled "Infotype" containing the number "0007". To the right of the input field is a small icon of a document with a checkmark and the label "STy".

Once the desired Infotype is displayed, you can then click on either the **Display** or **Overview** icon in the Application Toolbar.

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Infotypes Section

The following slides will provide an overview of a few of the key Infotypes. (This course will not cover all Infotypes.)

Infotype Text	Status
Actions (0000)	✓
Personal Data (0002)	✓
Organizational Assignment (0001)	✓
Addresses (0006)	✓
Basic Pay (0008)	✓
Cost Distribution(0027)	✓
Date Specifications (0041)	✓
Additional Personal Data (0077)	✓
College/Department Comments (9022)	

A green checkmark in the **Status** column (to the right of the **Infotype Text** column) indicates there is at least one record for the Infotype. No checkmark indicates no records at all.

Infotype: Actions (0000)

Actions information for an employee includes:

- Action Type / Reason for Action
- Employment status
- Position

If you use the **Overview** icon with this Infotype, you will see all of the PA40 Personnel Administration Actions that have been processed for the employee.

For example, you can see when they were initially hired, if/when they changed positions, if/when they retired/separated from UK, etc.

Display Actions (0000)

Person ID: 00001766 Pers Assign: 0000015 50126800 00000215

Pers No: 045

Name: [Empty] Job Title: [Empty] Emp. No: 00001766

FF-Infoc: 01 Skill Personnel: 1300 Main Campus

FF-Subgroup: 02 Main Campus 4 Personnel: 0002 40 g - 1

Start: 01/01/2000 to 31/12/9999 Category: 0000/0000/0000

Personnel action

Action Type: ZA Main Campus Create Assignment

Reason for Action: 01 Staff Hire

Status

Contract type: [Empty]

Employment: 0 Active

Special payment: [Empty]

Organizational assignment

Position: 50126800 Staff Support Associate I

Personnel area: 1300 Main Campus

Employee group: A Skill

Employee subgroup: 02 Main Campus 40 hour

Additional actions

Start Date	Action Type	Reason for Action
01/01/2000	ZA Main Campus Create Assignment	01 Staff Hire

Infotype: Personal Data (0002)

Personal Data on an employee includes:

- Name
- Social Security Number
- Date of birth
- Gender
- Marital status

Display Personal Data (0002)

Person ID: 10001766 Pers.Assgn: 00000245 50128809 00300245...

Name: Jonsey I. Smith Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Man Campus

EE subgroup: 05 Non-Exempt 4.. Pers. subarea: 0001 Reg FT

Start: 09/13/1966 To: 12/31/9999 Cnng: 12/28/2006 BMMCC12

Name

Title: [dropdown]

Last name: Smith

First name: Jonsey

Middle name: T.

Suffix: [dropdown]

Name: Jonsey T. Smith

HK data

SSN: [redacted]

Birth date: [redacted]

Mar. Status: 0 Singl.

Gender: Female Male

This example is a fictional employee.
The data seen is not real.

Infotype: Organizational Assignment (0001)

Organizational Assignment includes:

- Enterprise structure
 - Personnel Area
 - Personnel Subarea
 - Cost Center (main CC assigned to the position)
- Personnel structure
 - Employee Group
 - Employee Subgroup
 - Payroll Area
- Organizational plan
 - Position
 - Job Key
 - Org Unit

Display Organizational Assignment (0001)

Org. Structure

Person ID: 10001766 Pers. Assgn: 00000245.50128800.00000245

Name: Jency T. Selez Empl. %: 100.00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 05 Non-Exempt 4 Pers. subarea: 0001 Reg FT

Start: 01/01/2005 to 12/31/9999 Chng: 02/12/2005 01552

Enterprise structure

CoCode: 0000 University of Kentucky

Pers. area: 1000 Main Campus Subarea: 0001 Reg FT

Cost Ctr: Bus. Area:

Fund: 0213211900 PREVEN LIVE MED...

Grant: 0000 GMNR

Funct. Area: 0110 General Acct. Instruction

Personnel structure

EE group: A Staff Payr area: 01 bi-weekly

EE subgroup: 05 Non-Exempt 40 hour Contract: 40 Offhr & Contr

Organizational plan

Percentage: 100.00 Administrator

Position: 50120009 C0049M8 PersAdmin:

Job key: 40501117 C0049M8 Time:

Exempt: 01 Staff Support Assoc... PayAdmin:

Org. Unit: 30000358 74000 Staff Support Assoc...

Org. key: 1000 College Of Medicine

Infotype: Addresses (0006)

SAP can store different addresses such as:

- Permanent Residence (Home)
- Work Address
- Remote Work Address

This infotype also includes:

- Telephone Number
- County (of residence)
- Mail Code (Org Unit)
- Privacy Flag (used to designate home address as private)
- County of Employment

Display Addresses (0006)

Person ID: 11001766 Pers. Assgn: 00000245 50 28879 00000245

Name: Jobacy I. Smith Emp. %: 100.00

FF group: Skill Pension: 1000 Main Campus

EE subgroup: 05 Non-Exempt-4 Pers. subarea: 0001 Reg FT

Start: 08/01/2020 to: 02/28/2020 Cmg: 147 0000000000000000

Address

Address type: Permanent residence

Care Of: 00000253

Address line 1: 173 Main St.

Address line 2:

City: Lexington

State/zip code: KY Kentucky 41408

Country Key: US United States

Telephone Number: 559 123-4567

Communications

Type	Number	Extension
	0	
	0	
	0	
	0	

Additional fields

County: 034 Fayette

Mail code (org unit): 00000253 College Of Medicine

Privacy Flag:

County of Employment: 034 Fayette

District: 4

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Infotype: Basic Pay (0008)

Basic Pay information includes:

- Payscale Type (Hourly/Salary)
- Payscale Area (Main Campus / Hospital)
- Payscale Group (grade level)
- Work Hours/Period
- Annual Salary
- Hourly / Monthly Rate
- True Annual Salary
- Override Salary

Display Basic Pay (0008)

Person ID: 10001766 Pers. Assgn: 00000245 00125809 00000245

Name: Jonasev D. Smith Empl. No: 100.00

FF group: Subtype: salary

PS type: 10 Hourly Wk hrs/period: 40.00 Bi-weekly

PS Area: 11 Main Campus

PS group: 09 Level 01 Ann. salary: 20,000.00 USD

W...	Wage Type	Long Text	Q. Amount	Cur...	L. A.	Number/Unit	Int
1005	Hourly Rate		20.00	USD		0.00	

CV: 08/13/2020 12/31/9999 12.000 USD

Additional fields:

True Annual Salary	20,800.00	Override Salary	1.000
--------------------	-----------	-----------------	-------

Infotype: Date Specifications (0041)

Date Specifications includes:

- Original Hire Date
- Current Hire Date
- Regular Service Date
- Vacation Service Date
- Separation Date

Display Date Specifications (0041)

Person ID: 10001766 Pers.Assgn: 00000245 50128809 00000245

Name: Jcnsey T. Smith Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

EE subgroup: 05 Non-Exempt 4... Pers. subarea: 0001 Reg FT

Start: 01/01/2005 to 12/31/9999 Chng: 12/01/2005 MISSY

Date Specifications (0041)			
Date type	Date	Date type	Date
01 Original Hire Date	01/01/2005	02 Current Hire Date	01/01/2005
03 Reg Service Date	01/01/2005	05 Vacation Svc Date	01/01/2005
07 Separation Date	12/31/9999		

Note: A date of 12/31/9999 is a placeholder for the date type (i.e. Separation Date).

Note: If information is incorrect, contact HR Compensation so they can make the necessary changes.

Infotype: Residence Status (0094)

Residence Status information includes:

- Residence Status:
 - A = HR-Non Resident Alien
 - C = HR-Citizen
 - N = HR-Resident Alien
- Work Permit
- Issuing Authority
- Expiration date
- I9 Signature Date

Display Residence Status (0094)

Person ID: 11001776 Pers. Assign: 00000245 50128819 00000245

Name: Jonsey T. Smith Emcl %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

EE subgroup: 05 Non Exempt 1... Pers. subarea: 0001 Reg FT

Start: 01/01/2007 to: 12/31/9999 Changed on: 12/01/2007 MT:00Y

Personal identification

Residence status: C HR-Citizen

ID type: IA U.S. Drivers license w/photo

Issuing Authority: State of Kentucky

ID number:

Issuing date:

Expiry date:

Employment verification

Work Permit:

Issuing Authority:

Work permit number:

Issuing date:

Expiry of WP:

Case Verification Number:

Additional fields

ID Signature Date: 12/31/2004

Visa Type:

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Infotype: Planned Working Time (0007)

Work time information includes:

- Work Schedule Rule
- Working Week
- Employment Percent (FTE)
- Daily Working Hours
- Weekly Working Hours
- Monthly Working Hours
- Annual Working Hours
- Weekly Work Days

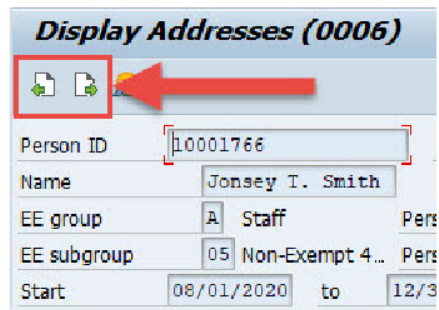
The screenshot shows the SAP 'Display Planned Working Time (0007)' interface. It includes fields for Person ID (10001766), Name (Jocsey I. Saitta), and Employment Percent (100.00). The 'Work schedule rule' section shows 'FIIC' with '8 h/c 40 h/w M-F' and 'Time Mgmt status' set to '1 - Time evaluation of actual times'. The 'Working time' section displays a table of values: Employment percent (100.00), Daily working hours (8.00), Weekly working hours (40.00), Monthly working hrs (173.33), Annual working hours (2080.00), and Weekly workdays (5.00). There is also an 'Additional fields' section with a checkbox for 'Seasonal / Less than three month assignment'.

Working time	
Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00
Weekly workdays	5.00

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Previous / Next Record Icons

If multiple records for an Infotype exist, you can use the **Previous Record / Next Record** icons in the Application Toolbar to scroll through the records.



The screenshot shows a software interface titled "Display Addresses (0006)". At the top, there is a toolbar with three icons: a left-pointing arrow, a right-pointing arrow, and a yellow circle with a red arrow pointing to it. A red box highlights the left and right arrow icons, and a red arrow points to the yellow circle icon. Below the toolbar is a data table with the following fields:

Person ID	10001766
Name	Jonsey T. Smith
EE group	A Staff Pers
EE subgroup	05 Non-Exempt 4... Pers
Start	08/01/2020 to 12/3

If the icons are grayed-out, this indicates either there is only one record for this Infotype or your **Period** selection on the initial screen is restricting you from accessing other records.

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Unit 4: Time Management



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Time Management Overview

Time Management (TM) provides support for all processes involved in the planning, recording, and reporting of employee working times (attendances) and leave time (absences).

It is integrated with Personnel Administration to obtain and validate information about working hours and leave quotas for absences.

There is also integration with Payroll. Hours entered, approved, and transferred are automatically released to the Payroll Department for processing.



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Key Benefits

Default **Target Hours** for hourly employees (based on their specific work schedule) can be easily applied to their time entry screen to lessen the amount of data entry.

Overtime is not entered as a separate total, but is calculated by the system from all hours worked within one week's time.

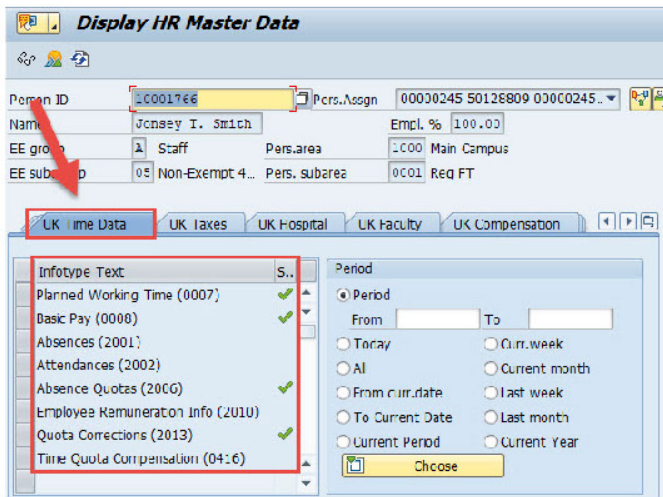
Vacation, TDL, and Holiday leave is accrued and tracked in SAP rather than in separate departmental systems.



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UK Time Data Tab

The majority of the Infotypes related directly to an employee's work and leave time are accessed via the UK Time Data tab.



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Planned Working Time (0007)

Normal work schedule information for an employee is used to determine an hourly employee's Target Hours.

The Time Management Status determines how the employee will be paid; by actual times entered or by the planned times in the work schedule.

Work schedule rule	
Work schedule rule	FI2C 7.5 h/d 37.5 h/w M-F
Time Mgmt status	1 1 - Time evaluation of actual times
Working week	01 Working Week Sunday - Saturday
<input type="checkbox"/> Part-time employee	
Working time	
Employment percent	100.00
Daily working hours	7.50
Weekly working hours	37.50
Monthly working hrs	162.50
Annual working hours	1950.00
Weekly workdays	5.00

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Basic Pay (0008)

This is the exact same Infotype that is on the UK Personal Data tab.

- Some Infotypes are accessible on multiple tabs.

Display Basic Pay (0008)

Salary amount: Payments and deductions

Person ID: Person Group:

Name: Control No:

EE group: Parameters:

Subgroup: Parameters:

Start: To: Day:

Subtype: Basic contract

Salary

PS type: Hourly Capital M:

PS Area: Main Campus Wkly/weekly: B weekly

PS system: Travel Ann. salary: USD

Wkly	Wage type	eng	last	Qr. Amount	Currency	U. A.	Number/Unit	Unit
0003	Hourly Rate			100.00	USD	100	0.00	

To: From: 15.00 15th

Additional fields

True Annual Salary: Ultimate Salary:

This example is a fictional employee.
The data seen is not real.

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Absences (2001)/Attendances(2002)

Absences and attendances can be recorded in partial-day or full-day hourly amounts.

Some absences and attendances influence pay.

- For example: Hours in excess of 40 hours per week (overtime), Shift differential, Unpaid leave



Some absences influence leave quota balances.

- For example: Vacation, Temporary Disability Leave (TDL), Holiday

Other absences are recorded for informational purposes.

- For example: Jury Duty, Funeral Leave

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Absences (2001)/Attendances (2002)

(Continued)

Examples of Absences (2001) and Attendances (2002) Infotype records:

Absences (2001)						
Start Date	End Date	Ab...	Att./abs. type text	Hours	Cal.days	Payroll
12/29/2010	12/29/2010	7155	HOLIDAY-Special	8.00	0.00	€
12/28/2010	12/28/2010	7155	HOLIDAY-Special	8.00	0.00	€
12/27/2010	12/27/2010	7155	HOLIDAY-Special	8.00	0.00	€
12/24/2010	12/24/2010	7156	HOLIDAY-Christmas	8.00	0.00	€
12/23/2010	12/23/2010	7155	HOLIDAY-Special	8.00	0.00	€
12/22/2010	12/22/2010	7155	HOLIDAY-Special	8.00	0.00	€
12/21/2010	12/21/2010	7155	HOLIDAY-S			
12/20/2010	12/20/2010	7155	HOLIDAY-S			
12/06/2010	12/06/2010	7170	VACATION			
12/03/2010	12/03/2010	7170	VACATION			

Attendances (2002)							
Start Date	End Date	At...	Att./abs. type text	Hours	O.	Position	CoC
01/03/2011	01/03/2011	1005	HOURS WORKED	8.00	0		
12/17/2010	12/17/2010	1005	HOURS WORKED	8.00	0		
12/16/2010	12/16/2010	1005	HOURS WORKED	8.00	0		
12/15/2010	12/15/2010	1005	HOURS WORKED	8.00	0		
12/14/2010	12/14/2010	1005	HOURS WORKED	8.00	0		
12/10/2010	12/10/2010	1005	HOURS WORKED	8.00	0		
12/09/2010	12/09/2010	1005	HOURS WORKED	8.00	0		
12/08/2010	12/08/2010	1005	HOURS WORKED	8.00	0		
12/07/2010	12/07/2010	1005	HOURS WORKED	8.00	0		
12/06/2010	12/06/2010	1005	HOURS WORKED	8.00	0		

Other Time Management Infotypes

Absence Quotas (2006)

- Used to display Vacation, Temporary Disability Leave (TDL), Holiday/Bonus Day, and Military leave balances

Employee Remuneration Info (2010)

- Used for manually processing calculated wage amounts, bonuses, premiums, and other irregular wage amounts.

Quota Corrections (2013)

- Used only by HR Leave Administration to make corrections and/or adjustments to quota balances (i.e. converting TDL to Vacation quota)

Time Quota Compensation (0416)

- Used to create TDL/Vacation payouts for staff retirement and separation

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Time Evaluation

Time Evaluation is an automated daily process that:

- Examines each employee's time data in light of institutional policies and federal and state requirements;
- Reports any errors;
- Calculates overtime; and
- Maintains quota accruals and usage.



Employee Master Data



Period Work Schedule



Time Recording



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Time Entry Overview

Methods of capturing absence/attendance time data include the following:

- Working Time entry through myUK Employee Self Service
- Leave Requests through myUK Employee Self Service
- Working time and leave request entry via SAP transactions
- Time collection systems (manual data entry or using time clocks)



The time entry transaction in SAP is the Cross Application Time Sheet (CATS).

A few areas at the University use non-SAP, external time management systems/applications for recording time, and their data is uploaded into the SAP HR/Payroll area for payroll processing once each pay period.

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CATS Time Entry

If time data is entered manually in SAP:

- Absence/attendance data is entered on behalf of non-exempt/hourly employees; and
- Absence data only is entered on behalf of exempt monthly or biweekly employees (attendance data is automatically processed in SAP).

Data Entry Period		12/11/2011 - 12/24/2011																			
Data Entry Area																					
EP	LT	Pers.No.	Name	COAr	A/...	Total	SU	12/11	MO	12/12	TU	12/13	WE	12/...	TH	12/15	FR	12/16	SA	12/17	
		548	Peter A Demery			80		0		8		8		8		8		8		8	0
		548	Peter A Demery	UK00	1005	80				0		8		8		6		0			
		548	Peter A Demery	UK00	7170	8				8											
		548	Peter A Demery	UK00	7180	10										2		8			

Time data entries must be reviewed and approved in SAP.

Finally, the time must be transferred from CATS into the appropriate Infotypes (2001/2002) in the SAP HR/Payroll module for payroll processing.

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Displaying Absence Quotas

Appropriate department users and business officers will have access to display absence quotas for employees within their organizational units.

The PT_QTA10 and PT50 reports will provide the:

- Type of quota (Vacation, TDL, Holiday, Military leave); and
- Entitlement hours (cumulative balance), Requested hours (time taken), and Remaining hours (current balance).

Employees may view their quotas via the myUK Employee Self Service website.

All balances are in **Hours** only.

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Displaying Absence Quotas (Continued)

Absence quota examples:

PT_QTA10:

Person ID	Organizational unit	Name	Pers. Assign...	Quota	Entitlement	Used	Total Reman.
				Vacation	66.70000	0.00000	66.70000
				TDL	689.86000	443.75000	246.11000
				Vacation(Legacy Transfer)	8.22000	8.22000	0.00000
				Holiday	8.00000	8.00000	0.00000
				Holiday	80.00000	0.00000	80.00000
					852.78000	459.97000	392.81000

Left blank intentionally

PT50:

Totals Line	AbQ...	Quota text	Unit	Multipl...	B	Entlmt	Rem.	Reques...	Com...	Deduction from	Deduction to	Start Date	End Date
	01	Vacation	Hours			..2.86000	..000	..0.53000	..0000				
						..7.40000	..000	..7.40000	..0000	03/19/2006	09/30/2007	03/19/2006	06/30/2006
						..0.16000	..000	..0.16000	..0000	07/08/2006	09/30/2008	07/08/2006	06/30/2007
						..8.36000	..000	..8.36000	..0000	07/07/2007	06/30/2009	07/07/2007	06/30/2008
						..0.08000	..000	..0.08000	..0000	07/31/2008	06/30/2010	07/31/2008	06/30/2009
						..0.08000	..000	..0.08000	..0000	07/31/2009	06/30/2011	07/31/2009	06/30/2010
						..0.08000	..000	64.45000	..0000	07/31/2010	06/30/2012	07/31/2010	06/30/2011
						..66.70000	..000	0.00000	..0000	07/31/2011	06/30/2013	07/31/2011	06/30/2012
	02	TDL	Hours			..9.86000	..000	..3.75000	..0000				
						..9.86000	..000	..3.75000	..0000	03/19/2006	12/31/9999	03/19/2006	12/31/9999

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Remuneration Statement

The Remuneration Statement (report) displays an employee's total earnings, taxes, post tax deductions, pre tax deductions and employer contributions.

The report is available after each of the three payroll runs and is identical in content to the employee's Pay Statement.

Departments often generate this report to verify that the time entry and payroll processes were successful for all of their employees.

Transaction code PC00_M10_CEDT is used to generate this report.



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Remuneration Statement Example

Employee Name Street Address City, State, ZIP	Person ID 00000000	SSN	Pay Date 11/16/2007	Period Begin Date 23/07	End Date 10/28/2007	11/10/2007	Check No.	Net Pay 1,064.55	
Filing Status		Exemptions FED	Add With	Exemptions ST		Add With			
CODE EARNINGS		RATE	HOURS	CURRENT	YTD	CODE PRE-TAX DEDUCTIONS		CURRENT	YTD
3000	Hours Worked	18.56	84.50	1,568.32	33,443.49	4325	E Parking BW She	14.00	299.00
3030	Overtime @ 1.5	9.28	4.50	41.76	1,423.70	5000	UK HMO Lexington	13.00	281.00
3200	Holiday Non-Exempt			1,444.48	1,444.48	5100	Eyemed Vision	4.45	95.00
3220	Vacation Non-Exempt			1,428.22	1,428.22	5130	MetLife Dental En		129.00
****	Total Earning			1,610.08	37,739.89	5135	Delta Dental Enha	14.47	173.64
CODE TAXES						5510	TIAA/CREF 403b EE	37.12	836.75
FED	TX Withholding Tax			181.21	4,445.18	5520	Fidelity 403b EE	37.12	836.75
FED	TX EE Social Securit			96.98	2,289.63	****	Total Pre Tax Deductio	120.16	2,652.04
FED	TX EE Medicare Tax			22.68	535.48	CODE POST-TAX DEDUCTIONS		CURRENT	YTD
KY	TX Withholding Tax			74.00	1,759.20	5210	Optional Life Ins EE	5.22	105.42
KY5I	TX EE School Tax			8.05	189.54	5220	AD&D Coverage EE	1.00	24.18
KY09	TX EE Occupation Tax			36.23	852.95	****	Total Post Tax Deducts	6.22	129.62
****	Total Tax			419.15	10,071.98	CODE BENEFITS		CURRENT	YTD
						6000	UK HMO Lexington E	182.50	3,965.00
						6200	Basic Life Ins Emp	1.66	35.42
						6510	TIAA/CREF 403b ER	74.24	1,673.50
						6520	Fidelity 403b ER	74.24	1,673.50
						6702	Staff Misc Fringe	59.57	1,330.60
						/404	TX ER Social Secur	96.98	2,289.63
						/406	TX ER Medicare Tax	22.68	535.48
						****	Total Benefits	511.87	11,503.13

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Cost Distribution (1018)

A position's default funding (for wages/salary) comes from Cost Centers and/or WBS Elements (grants).

This information is established in each position's master data record, Infotype **Cost Distribution (1018)**.

The two components included in this Infotype are the cost object numbers and the corresponding percentages.

In this example, the position is funded 100% by Cost Center 1012000860.

The screenshot shows the 'Display Cost Distribution' window in SAP. It includes fields for Position (C0049M8), Staff Support (Associate II), Planning Status (Active), and Start date (01/31/2005 to 12/31/9999). Below these is a table for Cost Distribution with the following data:

COA	Cost ctr	Order	WBS element	Name	Pct.	Name
1012000860	1012000860			GEN FUND - ADMIN	100.00	

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Cost Distribution (0027)

At times, it is necessary to charge an employee's wages/salary to a different accounting scenario for a specific period of time. This would be for:

- Employees who are being paid from WBS Elements (grants); and/or
- Employees whose Cost Distribution varies from their position's default Cost Distribution (1018).

This adjustment is made using the **Cost Distribution (0027)** Infotype in the employee's master data record. Thus, Infotype 0027 overrides the 1018 record.

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Cost Distribution (0027) (Continued)

In this example, 75% of Jonsey Smith's wages/salary will be charged to Cost Center 1012000810, and the other 25% will be charged to Cost Center 1012000820, effective August 1, 2020 forward.

Display Cost Distribution(0027)

Org. Management Info

Person ID: 10001766 Pers. Assign: 0000C245 50128809 00030245...

Name: Jonsey T. Smith Empl. %: 100.00

EE group: Staff Pers. area: 1000 Main Campus

EE subgroup: 05 Non-Exempt 4. Pers. subarea: 0001 Reg FT

Start: 08/01/2020 Ic: 12/31/9999 Chng: 08/10/2020 KREAGER

Distrb.: 01 Wage/Salary

Master cost center: []

CoCd	Cost ctr	Order	WBS element	Name	Pct.	Name
UK00	1012000810			NURSING ADMINISTRAT.	75.00	
UK00	1012000820			NURSING INSTRUCTION	25.00	

The end date can always be updated at a later point in time, should the department decide to end this particular record.

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Cost Distribution Objects Report

Transaction ZCOSOBJ provides a report on the cost distribution for employees that will be processed in payroll, either from Infotype 1018 or 0027.

Employees Cost Distribution Objects

Person ID	Personnel Number	First Name	Last name	Organisation Unit	Posi
P0571M4/Clinical Lab Sciences	00001656	Molly	Unger	7N90C/Health Sciences	Clinical
Emp. cost distri. (Wage/Salary)	Cost Center	Percentage(%)	WBS Element	Fund	Order
08/14/2020 to 08/14/2020	1012039200	100.00		0011030100	
Person ID	Personnel Number	First Name	Last name	Organisation Unit	Posi
P0680M6/Instructional Special	00004866	Edith	Rigby	7N90C/Health Sciences - Clinical	
Emp. cost distri. (Wage/Salary)	Cost Center	Percentage(%)	WBS Element	Fund	Order
00/14/2020 to 00/14/2020	1012039200	100.00		0011030100	

In the example above, 100% of Molly Unger and Edith Rigby's wages/salary will charge to Cost Center 1012039200.

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Unit 5: Payroll



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Payroll Accounting

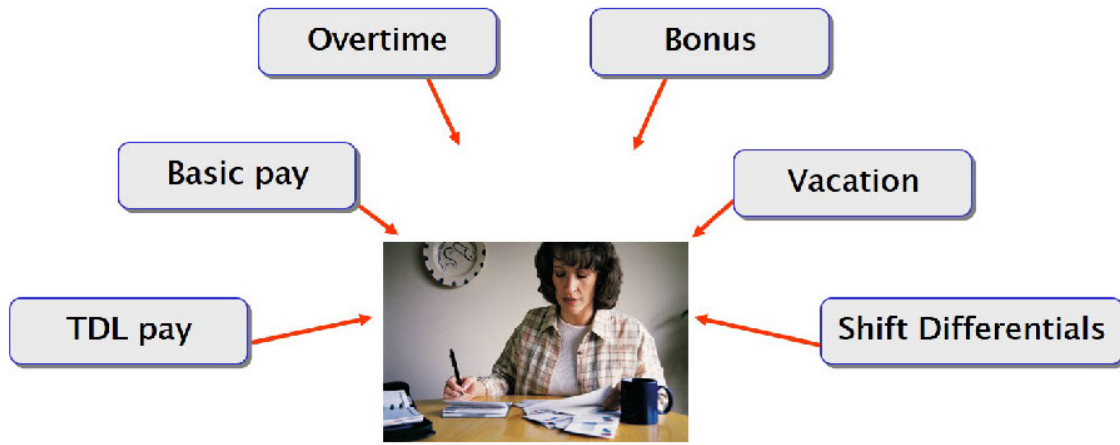
Payroll Accounting includes:

- Gross-to-net calculation of pay
- Generation of payroll results and remuneration statements
- Bank transfers
- Check payments
- Transfer of payroll results to Accounting
- Integrates with other SAP-HR modules
- Produces employee Pay Statements
- Payroll expense distribution

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Remuneration Elements

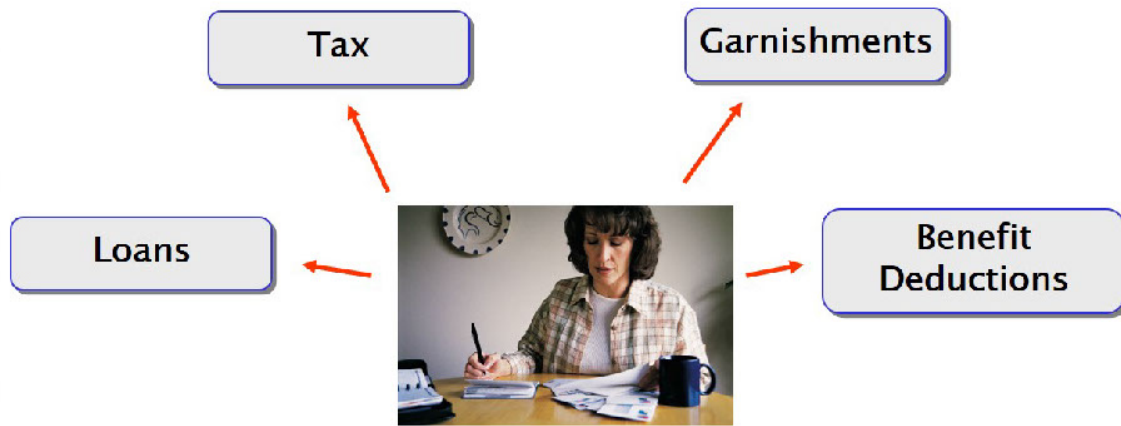
An employee's remuneration (pay) elements are made up of wage types applied during a payroll period.



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Voluntary and Required Deductions

Voluntary and required deductions are used to reduce gross remuneration resulting in the net pay amount.



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Deferred Pay

The Deferred Pay Solution provides a method of accurately tracking earnings and payments for 9-month and 10-month Faculty members who are paid over the full twelve months of the Fiscal Year.



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Unit 6: Reporting



Slide 101 - Slide 101

Reporting

In this unit we will cover two different types of HR reporting:

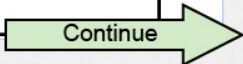
- SAP Reports
- Business Warehouse (BW) Reports

Access to these reports are based on the HR roles/access indicated in your IRIS Training Plan.

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SAP: Organizational Management

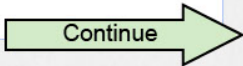
Report Name	Transaction Code	Description
Cost Center Report	ZCCWBS	Displays the employee salary and employer benefits with cost allocation; Run after payroll posting to accounting
Existing Jobs	S_AHR_61016497	Displays the names, codes, and start/end for any active jobs
History of Vacancies	S_AHR_61018869	Displays the history of vacancies (names and dates) and names of current position holders for every organizational unit
Job Index	S_AHR_61016498	Displays the name, object codes, position, holder, and staffing percentage of all active jobs
Organization and Staffing Display	PPOSE	Displays an object in the organizational structure and its lesser related objects. Display the master data records of any of these objects. NOT A REPORT, A DISPLAY SCREEN
Position Attribute Report	ZHR_POSATTR	Displays the positions in an area, including the Enterprise Structure, Grade level, EEO information, cost distribution, and the funding category code

Continue

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SAP: Organizational Management (Cont.)

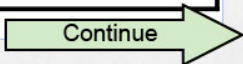
Report Name	Transaction Code	Description
Position Cost Center Distribution	ZHR_1018	Displays cost distribution on positions
Position Creation Tracking Report	ZHR_POSITION_TRACK	Displays basic information about positions
Position Vacancy Report	ZHR_VACREP	Displays current vacant positions by name and vacancy dates for specific organizational units
Salary Recommendation	ZHR_SALREC	Displays salary recommendations including an equity check for employees in the same job

Continue

Slide 104 - SAP Reports 3

SAP: Personnel Administration

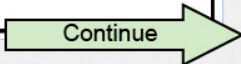
Report Name	Transaction Code	Description
Address Query	ZHR_ADDRESSES	Used to create a home address list for employees within an organizational unit
Employee Cost Distribution Objects	ZCOSOBJ	Displays cost allocations (IT 0027 or IT 1018) for employee
FTE Report	ZHR_FTE	Displays FTE and headcount
Hire Action Report	ZHR_HIREREPORT	Displays new hires, rehires, and reinstates in org unit for a specified time period; Report also indicates if a new employee's payroll record is locked
One Time Payment Report	ZHR_0015	Displays one time payments; can run using a wide range of selection criteria

Continue

Slide 105 - SAP Reports 4

SAP: Personnel Administration (Cont.)

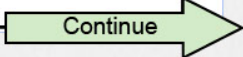
Report Name	Transaction Code	Description
Position Change Action Report	ZHR_POSCHANGE	Displays employees who have changed positions in an area during a specified period of time; Provides information on employee's new assignment, including new pay rate
Recurring Payment Report	ZHR_0014	Displays recurring payments; Can be run using a wide range of selection criteria
Retirement Action Report	ZHR_RETIRE	Displays retirement actions
Separation Report	ZHR_SEPARATE	Displays a listing of employees who have been separated from an org unit during a specified period of time
User ID and Email Report	ZHR_USER_ID	Displays a list of user system IDs and email addresses

Continue

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SAP: Time Management

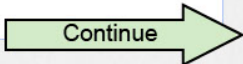
Report Name	Transaction Code	Description
Check Pay Report	ZHR_CHECKPAY	Quick reference to identify employees who have no pay amount for a specific payroll period; Run after preliminary run and thereafter for specific payroll period and single payroll area
Payroll Results by Org Unit	ZHR_PAYRESULTS	Displays payments of unit's employees and costs associated with each employee per payroll; Run after the preliminary payroll run up to final payroll for that period
Remuneration Statements	PC00_M10_CEDT	Simulates paycheck for pay-period; Run after preliminary payroll run up to final payroll for that period
STEPS Time Fee Audit	ZHR_STEPS	Used to validate STEPS hours that have been loaded
Display Working Time	CATS_DA	Displays working times for a single employee or a group of employees

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SAP: Time Management (Continued)

Report Name	Transaction Code	Description
Time Feed Audit Report	ZHR_TIMEFEEDRPT	Report for areas with time feed systems; Provides a listing of attendance and absence codes for specified time period; Areas that use CATS_DA will not use this report; Run for a specific payroll period
Vacation Accrual Liability	ZHR_VAC_ACCR	Used by Business Officers to see the financial liability for vacation hours that are available to employees in their departments
Verify Transfer of Time	ZVERXFER	Used to verify hours that have transferred successfully to HR for payment; May also be used to find hours that were unsuccessful during the transfer process; Run after transfer

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Business Warehouse (BW) Reports

Report Name	Information
HR Labor Distributions	Eleven reports available using the following display preferences: <ul style="list-style-type: none">• By Pay Period• Staff Cert by Org Unit for non FES faculty• Staff Cert by Org Unit for Staff• By Department• By Funds Center• By Grant• By Organizational Unit• By WBS Element• YTD Detail Analysis by Department• PTD Detail Analysis by Department
Employee Data (Not Labor) by Org Unit	Displays basic employee master data for an Organizational Unit.

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HR_200 Practice Guide (Optional)

After completing this course, you can practice viewing employee data in the Training Sandbox.

This is optional!

Click on the **HR_200 Practice Guide** button below to open and print the guide.

HR_200 Practice Guide

Then return to this course window and click on the **Continue** button below.



Continue

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Print This Course (Optional)

If desired, a printable version of this course is available!

To access and print:

1. Click on the printer (the PDF file will open in a separate browser window)
2. Print the course
3. Close the separate browser window
4. Return to this course window
5. Click on the **Continue** button below



To proceed without printing, click on the **Continue** button.

Continue

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The End

Congratulations, you have successfully completed this training course!



You may now close this course window and return to your myUK Learning Home page. The course should be listed in your "Learning History" tile, which contains all successfully completed courses.