TM: Variants & Reports

HR_TM_320

Integrated Resource Information System

Use the Forward button below ( ) to advance through the slides.

Prerequisites and Roles

- Prerequisites
  - UK_100 IRIS Awareness & Navigation
  - HR_200 HR Overview
  - HR_TM_310 TM: CATS Time Entry

    If you have not completed all of these prerequisite courses, please do so prior to taking this course.
- Roles
  - This course is primarily intended for users responsible for the recording and reporting of working times and absences.

Course Content

- Unit 1 – Global Variant & Reporting Functions
- Unit 2 – Selection Variants
- Unit 3 – Reports
- Course Summary

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Course Learning Objectives

- Learn how to use a few global SAP/IRIS functions when creating Time Management selection variants and running various reports
- Learn how to create, save, maintain, and use selection variants when working with multiple employees
- Be able to generate various time-related reports

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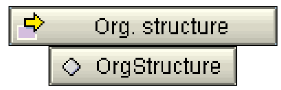
Check for Understanding

- The Check for Understanding is a series of questions which will be presented at the end of each unit.
- You must successfully pass a unit's Check for Understanding before proceeding to the next unit.
- To complete:
  1. Click on the radio button next to your answer
  2. Click on the **Next** button NEXT
  3. Repeat Steps 1 & 2 for each question
  4. After answering all of the questions, click on the **Submit All** SUBMIT ALL or **Submit All Answers** Submit All Answers button
  5. Upon passing, click on the **Finish** button to continue to the next unit in the course Finish

Unit 1

Global Variant & Reporting Functions

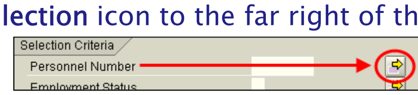
Global Variant and Reporting Functions

- Whether you are working with Time Management selection variants or running reports, there are a few global SAP/IRIS functions that can be used to enhance these processes:
  - **Multiple Selection** Icon 
  - **Organizational Structure** Buttons 

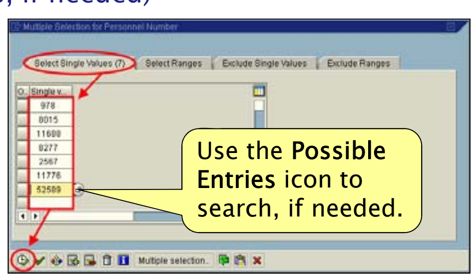
  - **Further Selections** Button 

  - **Selection Fields** Icon 

Multiple Selection Icon

- The **Multiple Selection** icon allows you to list multiple values for a field. For example, to list multiple Personnel Numbers:
  1. Click on the **Multiple Selection** icon to the far right of the **Personnel Number** field 

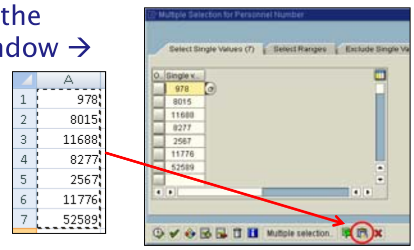
  2. Enter one Personnel Number on each line on the **Select Single Values** screen (use the scroll bar on the right side to access more blank lines, if needed)
  3. Press **Enter**
  4. Click on the **Execute** icon in the bottom-left corner



Multiple Selection Icon (Continued)

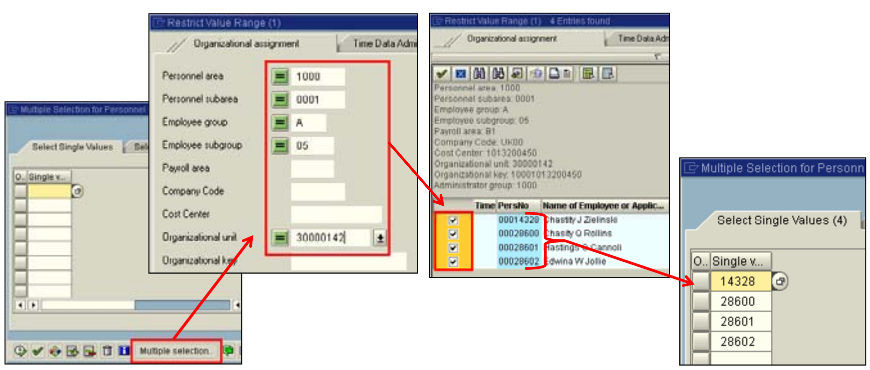
- Back on the main screen you will now see the first value from your list displayed in the field, and the box below the yellow arrow on the **Multiple Selection** icon will be green, indicating multiple values exist or are “active”.

- There are a couple other ways to populate the list on the multiple selection window:
  1. Select the data in an Excel spreadsheet and initiate the **Copy** function → switch to the **Multiple Selection for…** window → click on the **Upload from clipboard** icon.



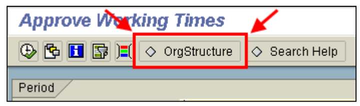
Multiple Selection Icon (Continued)

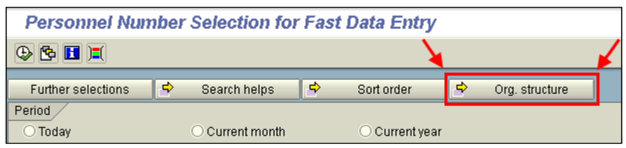
2. Click on the **Multiple selection** button in the bottom toolbar on the **Multiple Selection for…** window → go to the appropriate tab in the search window, enter the criteria that will capture the desired values, and press **Enter** → click in the checkboxes next to the desired values and press **Enter**.



Organizational Structure Buttons

- The **Organization Structure** buttons allow you to identify your Organizational Unit(s) for either a variant or a report.
- In some transactions the button is in the Application Toolbar, and in others it is at the top the screen.





- A gray diamond/box indicates no values are currently "active".

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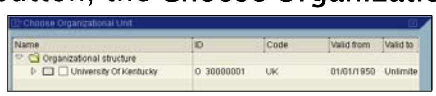
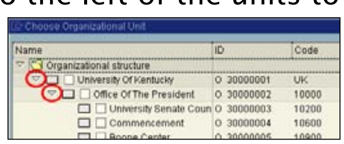
Organizational Structure Buttons (Continued)

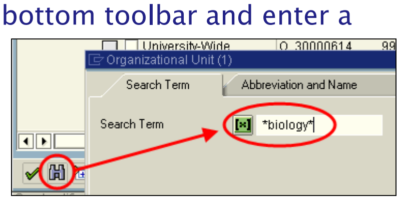
- Once you click on the button, the **Choose Organizational Unit** window will open.



- To find your Org Unit(s) in the **Organizational structure**, click on the triangles to the left of the units to "drill down" through the structure.



- To find your Org Unit(s) quickly:
  1. Click on the **Find** icon in the bottom toolbar and enter a word from your Org Unit's name in the search window (use the * before and after the name for best search results) and press **Enter**



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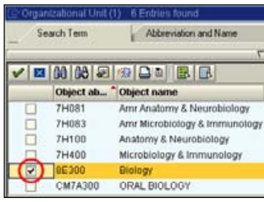
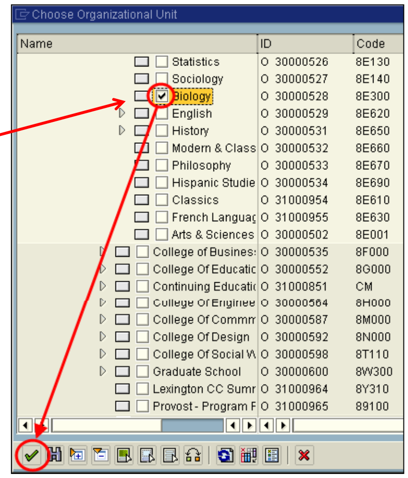
Organizational Structure Buttons (Continued)

2. If more than one Org Unit matches your criteria, click in the checkbox next to the desired value and press **Enter**

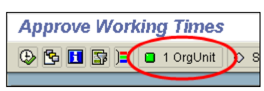


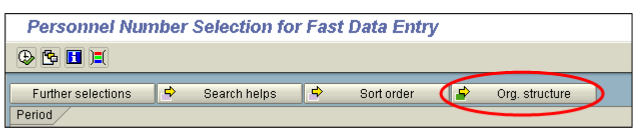


- Once you locate your Org Unit(s), click in the checkbox next to the **Name**(s) to select, then click on the **Continue** icon.

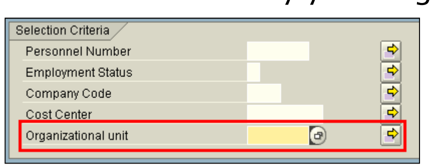
Organizational Structure Buttons (Continued)

- You will now see a green light on the buttons indicating at least one Org Unit has been selected and is now "active" criteria on the screen.





- Optionally, you can use the **Organizational Unit** field in the main part of the screen to identify your Org Unit(s).



Further Selection Button

- The **Further selections** button will allow you to add one or more fields to the screen that do not appear by default, should you wish to use them in creating a selection variant or generating a report.
- The button is usually located in the top-left corner of the screen. However, it is not seen in every transaction covered in the three Time Management courses. In some transactions you will need to use the **Selection Fields** icon, discussed momentarily.
- Unless you save the screen as a variant, the added field(s) will <u>not</u> remain on the screen once you exit the transaction.

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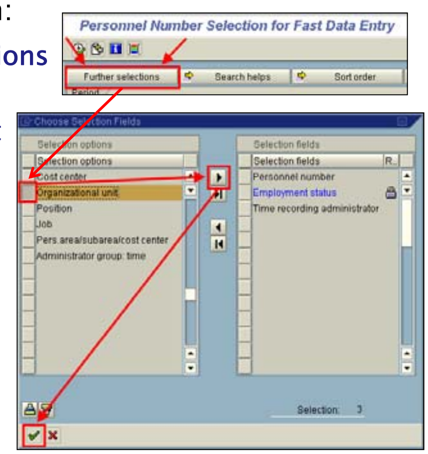
Further Selection Button (Continued)

- In this example we are going to add the **Organizational unit** field to the CAT2 screen:
  1. Click on the **Further selections** button
  2. Click on the box to the left of the field to select
  3. Click on the **Select** icon in the middle of the two columns to move it from the left to the right, which lists the fields currently on the screen
  4. Click on the **Continue** icon or press **Enter**



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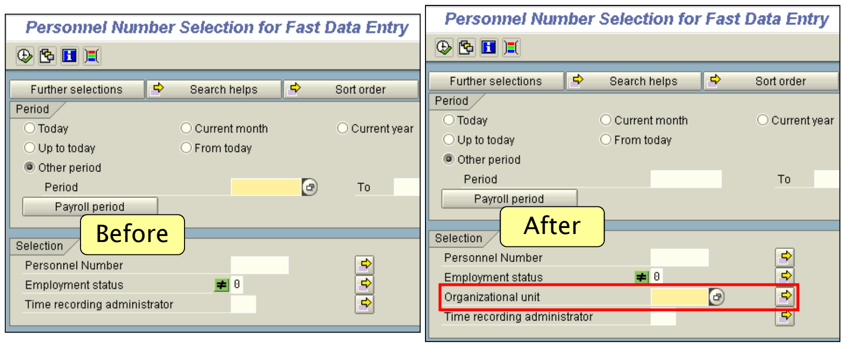
Further Selection Button (Continued)

- Now the **Organizational unit** field is on the screen and available for use.

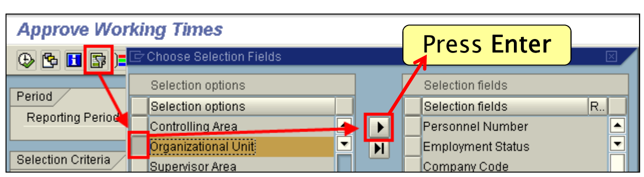


- The field(s) you add will always appear in the **Selection** section on the screen.

Selection Fields Icon

- For those transactions that do not have the **Further selections** button, you will need to use the **Selection Fields** icon in the Application Toolbar to get started.

- Once you click on the icon, the remaining steps to add one or more fields to the screen are the same as those listed for the **Further selections** button. It's literally just a different starting point.



Unit 1
Check for Understanding

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HR_TM_320 Unit 1

Question 1 of 5

Which icon allows you to list more than one value for a field on a selection screen?

- Selection Fields icon
- Possible Entries icon
- Multiple Selection icon
- None of the above

Properties... Edit in Quizmaker

- PROPERTIES
- On passing, 'Finish' button: Goes to Next Slid
- On failing, 'Finish' button: Goes to Previous Slide
- Allow user to leave quiz: After user has completed quiz

Unit 2

Selection Variants

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Selection Variants

- A selection variant is a saved set of selection criteria.
- In the IRIS-HR Time Management module, selection variants can be used to process the three time entry transactions for different groups of employees simultaneously instead of one employee at a time.
  - The two main groups discussed in this course are biweekly and monthly employees. Other various groups can be created though as needed.
- Creating, saving, and using selections variants is optional! However, using selection variants in the three time entry transactions can greatly help reduce the amount of processing time!

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Selection Variants (Continued)

- Selection variants are global in IRIS.
  - For example, all users who have access to CAT2 can see all of the variants that have been created and saved in CAT2, but they will be able to access only the employees to whom they have security access for in their area.
  - This can be a big benefit for a back-up timekeeper. As long as s/he knows either the name of a variant or the User ID of the main timekeeper, they can use that variant since they will have access to the same employees.
- Selection variants are saved with the User ID of the employee creating and saving the variant.
  - During the saving of a variant, there is an option to **Protect Variant**, which keeps other users from changing or deleting the variant. Only the "owner" can maintain the variant.

Selection Variants (Continued)

- You can have as many selection variants as needed in any transaction. However, a selection variant created in one transaction can <u>not</u> be copied to or opened in another transaction.
  - If you want to have the same variant in multiple transactions, you must create and save the variant in each transaction separately.
- Feel free to create any selection variant(s) that best suits your business needs. This course is mainly covering the basic concepts to which you can build upon.

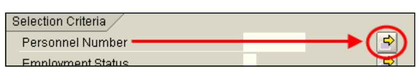
Creating Selection Variants

- A selection variant can be created by one of two methods:
  - Listing individual Personnel Numbers
    - Requires manual changes with employee turnover
  - Using Enterprise Structure Values (Personnel Area/Subarea, Employee Group/Subgroup, Organizational Unit, Etc.)
    - System will automatically retrieve current, active employees

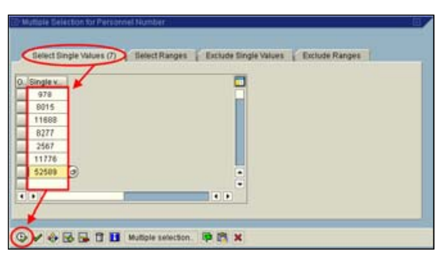
- The global functions covered in Unit 1 of this course really come into play when creating a selection variant, since we're dealing with multiple employees and identifying employees by using various fields which may not always initially be on the screen.

Creating by Personnel Numbers

- Use the **Multiple Selection** icon to the far right of the **Personnel Number** field to list multiple values.



- Reminder: There are three ways to populate the list of Personnel Numbers on the **Select Single Values** screen:
  - Manually enter the numbers
  - Copy and paste from Excel
  - Use the **Multiple selection** button to search for the numbers



Creating by Personnel Numbers (Continued)

- The main thing to remember with creating a selection variant by Personnel Numbers is that the list of numbers has to be manually maintained with employee turnover.
- To maintain the list:
  1. Open the variant (discussed momentarily)
  2. Make the change(s)
  3. Save the change(s) (discussed momentarily)
- If you have a high turnover rate in your department, it may make more sense to create a selection variant using some of the Enterprise Structure Values, which will automatically retrieve your current, active employees.

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Creating by Enterprise Structure Values

- Use any combination of the Enterprise Structure Values listed below in creating a selection variant:

Selection Field	Example Values
Personnel Area	Campus, STEPS, Hospital
Personnel Subarea	Regular FT, Regular PT, Temp PT
Employee Group	Staff, Student, Faculty
Employee Subgroup	Exempt Monthly, Non-exempt 40, Non-exempt 37.5
Organizational Unit	Department number

- The values you use help create a “profile” for the employees you are trying to capture, rather than listing specific Personnel Numbers which must be maintained.

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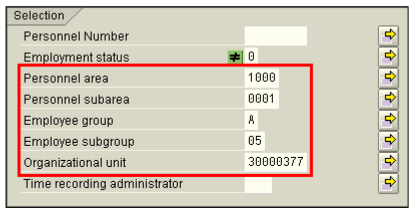
Creating by Enterprise Structure Values (Con't)

- For example, if you wanted to create a selection variant to identify all of the regular full-time, non-exempt, 40 hour/week, staff in the department of Behavioral Science, you would use the following:
  - **Personnel area**: **1000** (Main Campus)
  - **Personnel subarea**: **0001** (Reg FT)
  - **Employee group**: **A** (Staff)
  - **Employee subgroup**: **05** (Non-Exempt 40 hour)
  - **Organizational unit**: **30000377** (Behavioral Science)

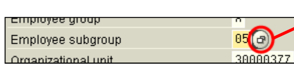


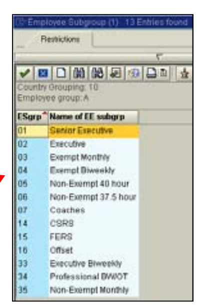
Creating by Enterprise Structure Values (Con't)

- You may need to use the **Further selections** button or **Selection Fields** icon to add some of these fields to the screen.
  - Other fields are also available, such as Cost Center and Payroll Area. Use whatever best helps you!

- Use the **Multiple Selection** icon if you need to identify multiple values for any field.

- Use the **Possible Entries** icon to view all the possible values for any field.

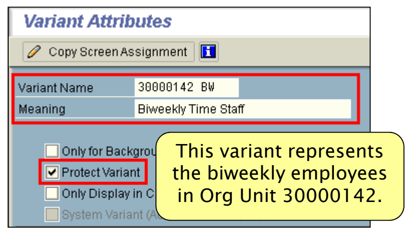




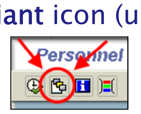
Saving a Selection Variant

- Once you have all of the selection variant criteria entered on the screen (either Personnel Numbers or Enterprise Structure Values), you can then save the variant as follows:
  1. Click on the **Save** icon 

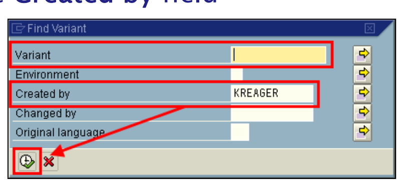
  2. Enter a:
     - **Variant Name** – Required; Must be unique but specific so you know what the variant represents; Can contain letters, numbers, spaces, and special characters
     - **Meaning** – Required; Brief description of the variant
  3. Click in the checkbox next to **Protect Variant**, which will keep others from changing or deleting your variant
  4. Click on the **Save** icon again



Accessing a Selection Variant

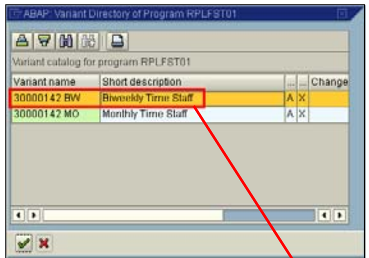
- To access a saved selection variant:
  1. Enter the desired transaction
  2. Click on the **Get Variant** icon (usually the 2nd icon in the Application Toolbar) 

  3. On the **Find Variant** window enter either the **Variant** name or leave your User ID in the **Created by** field
  4. Click on the **Execute** icon
     - If you entered a **Variant** name, the system will open that variant.
     - If you leave your User ID, the system will either open the variant if you have just one saved, or it will display a list for you to choose from if you have saved more than one variant (see next slide).

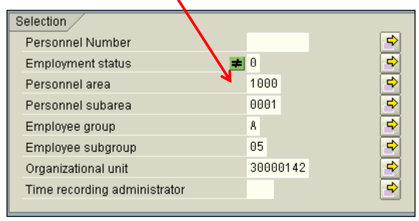


Accessing a Selection Variant (Continued)

5. If you receive a list of your variants, double-click on the desired variant



- The system will open the variant with the saved criteria.



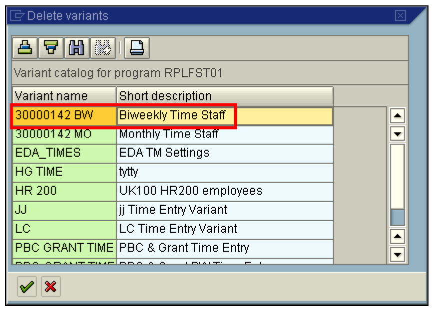
Maintaining a Selection Variant

- If at any point you need to make any changes to the saved criteria in a selection variant:
  1. Enter the desired transaction
  2. Click on the **Get Variant** icon and "open" the variant
  3. Make the necessary changes
  4. Click on the **Save** icon
  5. If you are not going to change the **Variant Name** and **Meaning**, click on the **Save** icon again
     - Click on the **Yes** button on the **Overwrite variant** window

     If you are changing the **Variant Name** and/or **Meaning**, make the change(s), then click on the **Save** icon

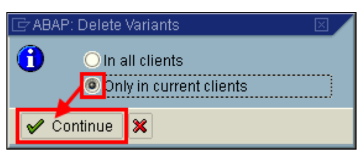
Deleting a Selection Variant

- To delete a selection variant in a transaction, complete the following steps:
  1. Enter the transaction and get to the screen where you normally maintain and get variants
  2. In the Menu Bar select **Goto → Variants → Delete**
  3. Double-click on the variant you wish to delete

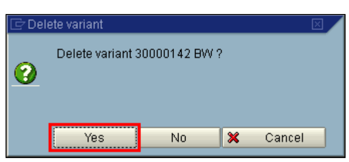


Deleting a Selection Variant (Continued)

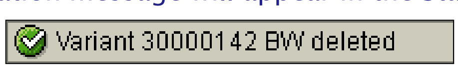
4. Click in the radio button next to **Only in current clients** to select, then click on the **Continue** button



5. Click on the **Yes** button to delete



- A confirmation message will appear in the Status Bar:



Unique Selection Variant Issues

The remaining slides in this unit are going to cover some unique selection variant issues for each of the three time entry transactions.

CAT2 Selection Variants

CAT2 Selection Variants

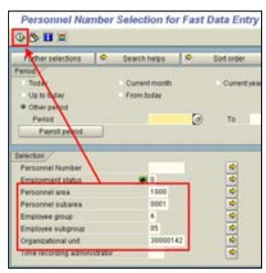
- In order to create, maintain, or access a selection variant in CAT2 you must be able to get to the **Personnel Selectn** button on the ***Time Sheet: Initial Screen***, which will take you to the criteria screen. 

- If you are just creating or maintaining a CAT2 variant, it does <u>not</u> matter what the **Data Entry Profile** and **Key date** are, since this information is <u>not</u> saved with the variant.

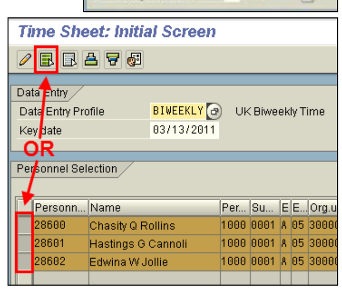
- Use the **Further selections** button to add other fields to the **Selection** section. Use the **Multiple Selection** icon to the right of any field to list multiple values.

CAT2 Selection Variants (Continued)

- A few other notes/tips on using CAT2 selection variants:
  - After opening the variant, click on the **Execute** icon to retrieve the employees

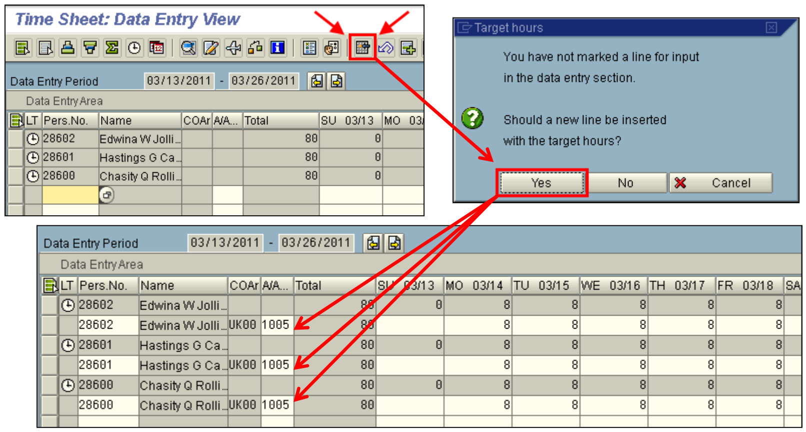


  - Either click on the selection box or click on the **Select All Persons** icon to select the employees for whom you wish to enter data
    - You do <u>not</u> have to select <u>all</u>, if applicable.



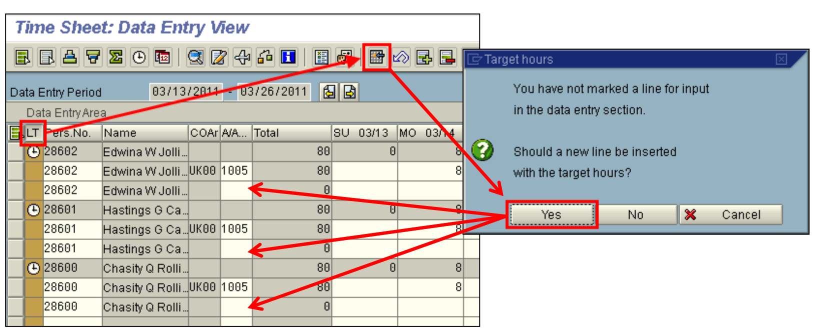
CAT2 Selection Variants (Continued)

- To add the regular Hours Worked (1005) row automatically for all biweekly employees on the screen:
  1. Click on the **Target Hours** icon in the Application Toolbar
  2. Click on the **Yes** button on the pop-up window



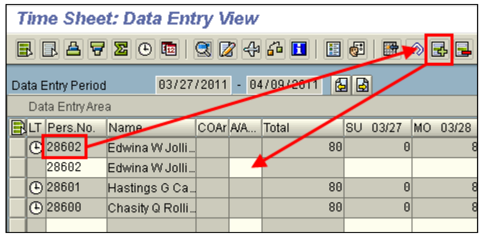
CAT2 Selection Variants (Continued)

- To insert a blank row simultaneously for all employees (biweekly/monthly) on the screen:
  1. Click on the **LT** column header box to select the column
  2. Click on the **Target Hours** icon in the Application Toolbar
  3. Click on the **Yes** button on the pop-up window (The system will copy the employee's **Personnel Number** and **Name** only.)
  4. Repeat steps 2 and 3 above for each additional row needed



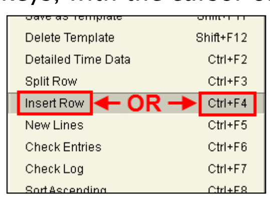
CAT2 Selection Variants (Continued)

- To insert a blank row for one employee (biweekly/monthly):
  1. Click on the employee's Personnel Number
  2. Click on the **Insert Row** icon in the Application Toolbar

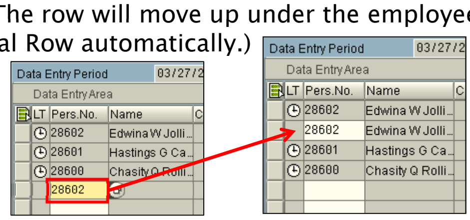


CAT2 Selection Variants (Continued)

- Other methods for inserting one blank row:
  - Right-click on the employee's Personnel Number and select **Insert Row** from the menu
  - Press the **Ctrl** + **F4** keys, with the cursor on the employee's Personnel Number



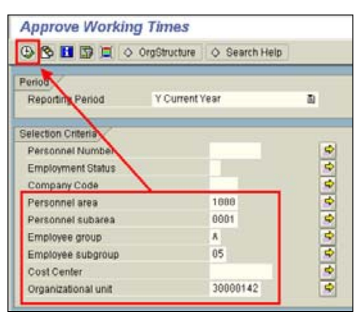
  - Enter the employee's Personnel Number in the first blank row and press **Enter** (The row will move up under the employee's Target Hours/Total Row automatically.)



CATS_APPR_LITE Selection Variants

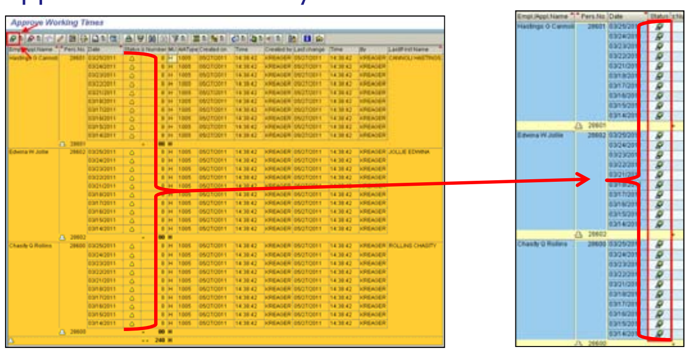
CATS_APPR_LITE Selection Variants

- Selection variants for the approval transaction, CATS_APPR_LITE, are created, maintained, and accessed on the initial screen.
- Use the **Selection Fields** icon to add other fields to the **Selection Criteria** section. Use the **Multiple Selection** icon to the right of any field to list multiple values.
- After getting a selection variant, click on the **Execute** icon to retrieve the time data that needs to be approved.



CATS_APPR_LITE Selection Variants (Continued)

- After reviewing the data for accuracy:
  1. Click anywhere along the very top row to select
  2. Press the **Ctrl** + **A** keys, which will select all of the rows
  3. Click on the **Approve** icon
  4. Check the **Status** column to make sure it displays the Approved icon for everyone on the screen



ZCAT6 Selection Variants

ZCAT6 Selection Variants

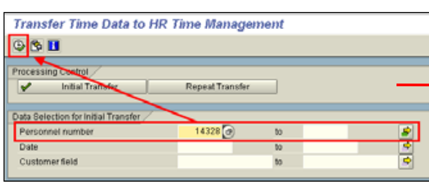
- Selection variants for the transfer transaction, ZCAT6, are created, maintained, and accessed on the initial screen.

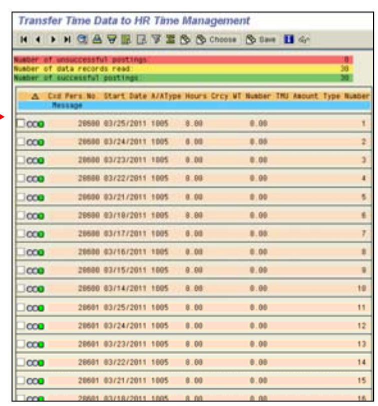
- Selection variants can be created by using only the Personnel Number field. No other fields can be added to the initial screen in this transaction.

- Use the **Multiple Selection** icon to the right of the **Personnel Number** field to list multiple values.

ZCAT6 Selection Variants (Continued)

- After getting a selection variant, click on the **Execute** icon to transfer the approved time data for all the employees identified in the variant.





Unit 2
Check for Understanding

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HR_TM_320 Unit 2

Question 1 of 7

In CAT2, the values in the Data Entry Profile and Key Date fields are not saved when saving a selection variant.

- True
- False

- PROPERTIES
- On passing, 'Finish' button: Goes to Next Slide
- On failing, 'Finish' button: Goes to Previous Slide
- Allow user to leave quiz: After user has completed quiz

Properties...

Edit in Quizmaker

Unit 3

Reports

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Payroll Processing Reports

- There are two reports available to all timekeepers for verifying that the time entry and payroll run processes were successful for their employees.
  - Remuneration Statement
  - Payroll Result Report
- Both of these reports are available after each of the three payroll runs.
  - It is highly recommended that at least one of these two reports be run the day after the Preliminary Payroll Run for the pay period so that if there are any issues, they can be resolved prior to the Final Payroll Run.

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Remuneration Statement

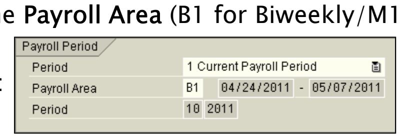
- The Remuneration Statement is a detailed list of amounts and information for employees per pay period. This usually includes:
  - Gross/Net Earning Amounts
  - Taxes
  - Pre/Post Tax Deductions
  - Employer Contributions

- This report is similar to an employee's Pay Statement, but does not include the absence quota balances information.
  - An employee's Pay Statement (on the myUK Employee Self-Service screen) is also available the day after the Preliminary Payroll Run. Employees should be encouraged to check the report for accuracy and report any issues ASAP.

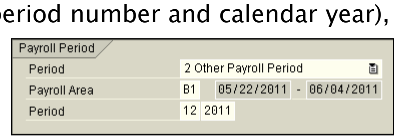
Remuneration Statement (Continued)

1. Enter transaction code **PC00_M10_CEDT**

2. Enter the desired **Payroll Period**
   - **Current Payroll Period**
     - Also enter the **Payroll Area** (B1 for Biweekly/M1 for Monthly) and press **Enter**
     - For example:



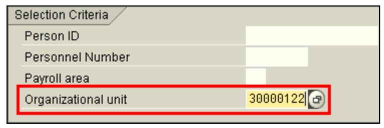
   - **Other Payroll Period**
     - Also enter the **Payroll Area** (B1 for Biweekly/M1 for Monthly), the **Period** (pay period number and calendar year), and press **Enter**
     - For example:



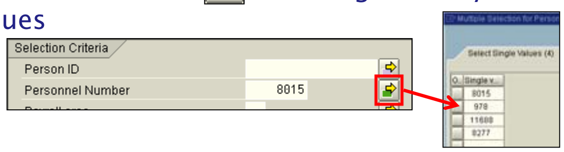
Remuneration Statement (Continued)

3. Indicate your employee selection by completing the **Selection Criteria** with one of the following:
    - One employee's **Person ID** or **Personnel Number**
        - For example:

    - Use the **Selection Fields** icon in the Application Toolbar to add other fields to the screen, like **Organizational Unit**
        - For example:

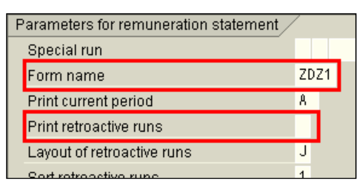


    - Use the **Multiple Selection** icon to the right of any field to list multiple values
        - For example:



Remuneration Statement (Continued)

4. In the **parameters for remuneration statement** section, do the following:
    - Select the desired **Form name** – This determines the layout of the report. There are 4 different layouts to choose from.
    - Delete the "**X**" in the **Print retroactive runs** field



5. Click on the **Execute** icon in the Application Toolbar to run the report

Remuneration Statement (Continued)

- If all was entered and processed successfully, the report should look similar to this example (**ZDZ1** layout):

Person ID	SSN	Pay Date	Period	Begin Date	End Date	Check No.	Net Pay
		11/16/2007	23/07	10/28/2007	11/10/2007		1,064.55

Filing Status	Exemptions FED	Add With	Exemptions ST	Add With

CODE	EARNINGS	RATE	HOURS	CURRENT	YTD
3000	Hours Worked	10.56	84.50	1,560.32	33,443.49
3030	Overtime 0.5	9.28	4.50	41.76	1,423.70
3200	Holiday Non-Exempt				1,444.48
3220	Vacation Non-Exempt				1,428.22
****	Total Earning			1,610.00	37,739.09
CODE	TAXES				
FED	TX Withholding Tax			181.21	4,445.18
FED	TX EE Social Securit			96.98	2,289.63
FED	TX EE Medicare Tax			22.68	535.48
KY	TX Withholding Tax			74.00	1,759.20
KY5I	TX EE School Tax			8.05	189.54
KY09	TX EE Occupation Tax			36.23	852.95
****	Total Tax			419.15	10,071.98

CODE	PRE-TAX DEDUCTIONS	CURRENT	YTD
4325	E Parking BW She	14.00	299.00
5000	UK HMO Lexington	13.00	281.00
5100	Eyemed Vision	4.45	95.90
5130	MetLife Dental En		129.00
5135	Delta Dental Enha	14.47	173.64
5510	TIAA/CREF 403b EE	37.12	836.75
5520	Fidelity 403b EE	37.12	836.75
****	Total Pre Tax Deductio	120.16	2,652.04
CODE	POST-TAX DEDUCTIONS	CURRENT	YTD
5210	Optional Life Ins EE	5.22	105.12
5220	AD&D Coverage EE	1.00	24.50
****	Total Post Tax Deducts	6.22	129.62
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	96.90	2,209.63
/406	TX ER Medicare Tax	22.60	535.40
****	Total Benefits	511.07	11,503.13

- If the report appears blank, double-check the criteria you entered for accuracy. If the criteria is correct and the report still appears blank, run the Payroll Result Report.

Payroll Result Report

- The Payroll Result Report is a quick reference report used to identify employees who did not get processed during a payroll run.

- The report can be run for only a single pay period and one payroll area (B1 for Biweekly/M1 for Monthly).

- If an employee's pay rate changes during a pay period (and thus a new Basic Pay (0008) infotype is created), the employee will be listed twice on the report.
  - One line will represent the previous pay rate, and the second line will represent the new pay rate.

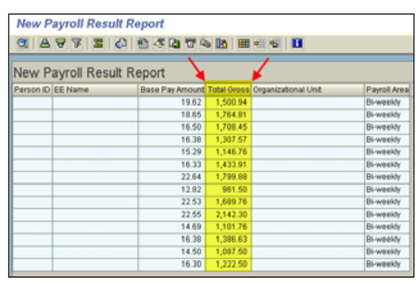
Payroll Result Report (Continued)

1. Enter transaction code **ZHR_CHECKPAY**
2. Enter the desired **Payroll Period**
3. Enter the appropriate **Selection Criteria**
   - Enter the **Payroll area**
   - Identify your employee(s) by entering either a **Personnel Number**, an **Organizational unit**, or use the **Selection Fields** icon to add other fields to the screen; Use the **Multiple Selection** icon to enter multiple values for any of these fields, if applicable.

4. Click on the **Execute** icon in the Application Toolbar

Payroll Result Report (Continued)

5. Review the **Total Gross** column, primarily looking for any $0.00 amounts. Different reasons can account for a $0.00 Total Gross amount. For example,
   - It is an hourly employee whose hours have not yet been entered.
   - Infotype 0003 (Payroll Status) may still be locked if the employee is a new hire.
   - A payroll error has occurred and requires master data correction.

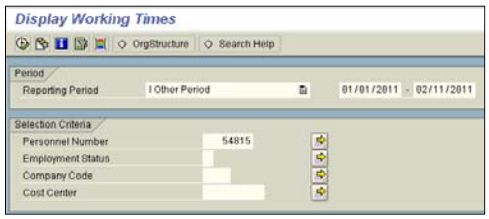


- Any $0.00 amounts must be resolved prior to the Final Payroll Run for the pay period in order for the employee(s) to be paid!

Display Working Times

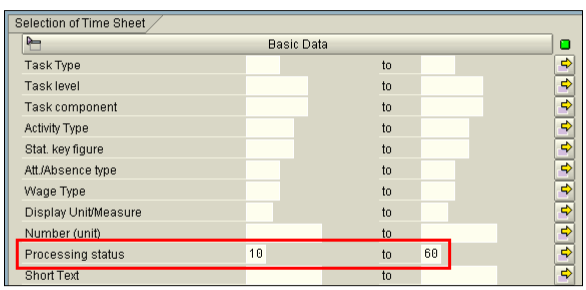
- This report can be used to display working times for a single employee or a group of employees as needed.

1. Enter transaction code **CATS_DA**
2. Enter the desired **Reporting Period**
3. Enter the appropriate **Selection Criteria**
   - Identify your employee(s) by entering either a **Personnel Number**, an **Organizational unit** or use the **Selection Fields** icon to add other fields to the screen; Use the **Multiple Selection** icon to enter multiple values for any of these fields, if applicable.



Display Working Times (Continued)

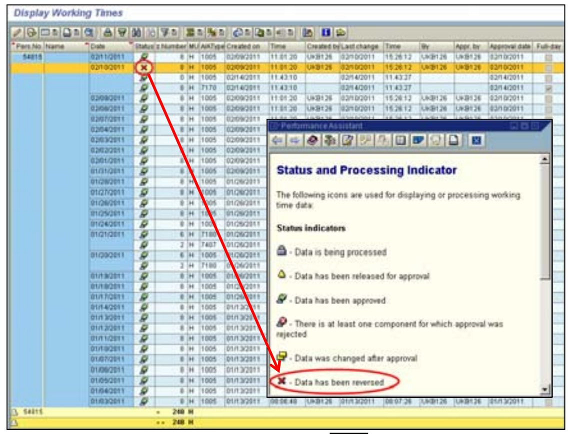
4. Ensure that the **Processing status** is at a range of **10 to 60**, which will capture all time data



5. Click on the **Execute** icon in the Application Toolbar

Display Working Times (Continued)

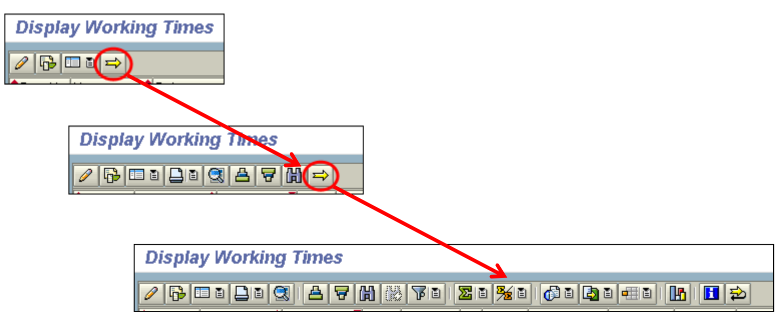
- To determine the value for any of the icons in the **Status** column, click on the icon (which will highlight the row) then press the **F1** key to display the **Performance Assistant** window.



- To print the report, click on the **Print** icon in the Standard Toolbar.

Display Working Times (Continued)

- Use any of the icons in the Application Toolbar to further manipulate the report as desired.
  - It may be necessary to click on the **Additional Functions** icon (yellow arrow) to display additional icons.



Daily Time & Leave Summary Reports

- Transaction **Z_TIMERPT** can be used to create summary reports of employee work time and leave quota usage information.

- The reports can display information for any time period desired and for one or multiple employees.

- The reports can be run to check for data accuracy, or they can be printed for distribution to employees or placement in departmental files.

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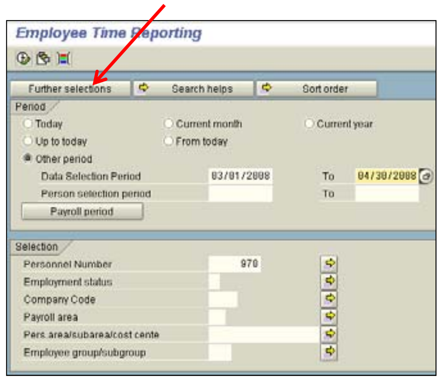
Daily Time Report

1. Enter transaction code **Z_TIMERPT**
2. Select the desired **Period** or enter a **Data Selection Period**
3. Enter the appropriate **Selection** criteria
   - Identify your employee(s) by entering either a **Personnel Number** or use the **Further selections** button to add other fields to the screen (such as **Organizational Unit**); Use the **Multiple Selection** icon to enter multiple values for any of these fields, if applicable.



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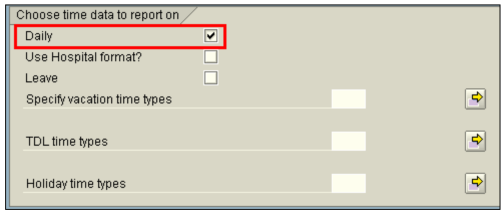
Daily Time Report (Continued)

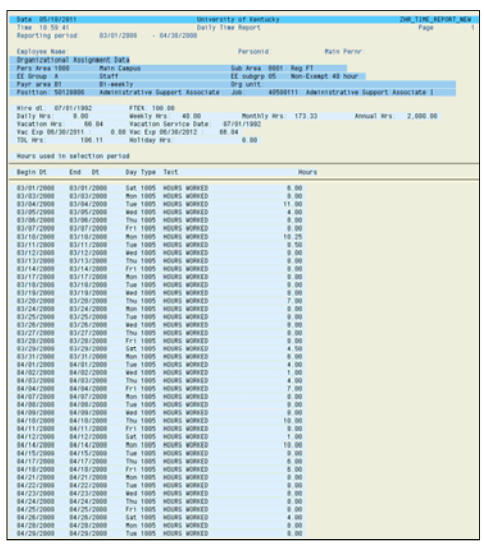
4. To see daily work time, ensure that only the **Daily** option is selected in the **Choose time data to report on** section.
   - You may need to click in the **Leave** checkbox to unselect. It is usually best to run only one of the reports at a time.



5. Click on the **Execute** icon in the Application Toolbar

Daily Time Report (Continued)

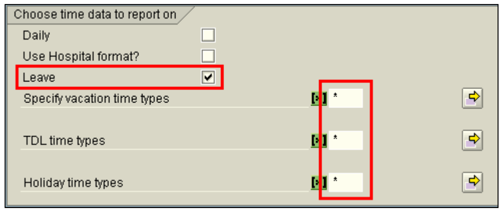
- The top two sections of the report are just general header information about the employee.



- Print the report by clicking on the **Print** icon in the Standard Toolbar, if desired.

Leave Summary Report

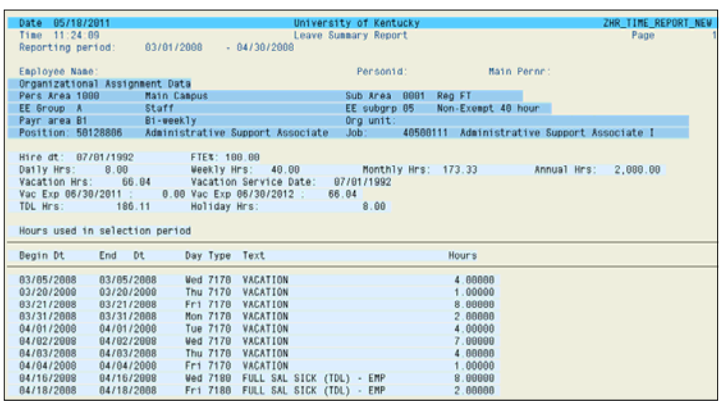
- To view absences in this transaction:
  1. Click in the **Leave** checkbox to select
     - Ensure the **Daily** checkbox is <u>un</u>selected
  2. Enter an asterisk (*) in the three **time types** fields



  3. Click on the **Execute** icon in the Application Toolbar

Leave Summary Report (Continued)

- The absences are listed in chronological order within each quota type (Vacation, TDL, Holiday, Etc.).



Date 05/18/2011 University of Kentucky ZHR_TIME_REPORT_NEW
Time 11:24:09 Leave Summary Report Page 1
Reporting period: 03/01/2008 - 04/30/2008

Employee Name: Personid: Main Pernr:
Organizational Assignment Data
Pers Area 1000 Main Campus Sub Area 0001 Reg FT
EE Group A Staff EE subgrp 05 Non-Exempt 40 hour
Payr area B1 Bi-weekly Org unit:
Position: 50128806 Administrative Support Associate Job: 40500111 Administrative Support Associate I

Hire dt: 07/01/1992 FTE%: 100.00
Daily Hrs: 8.00 Weekly Hrs: 40.00 Monthly Hrs: 173.33 Annual Hrs: 2,080.00
Vacation Hrs: 66.04 Vacation Service Date: 07/01/1992
Vac Exp 06/30/2011 : 0.00 Vac Exp 06/30/2012 : 66.04
TDL Hrs: 186.11 Holiday Hrs: 8.00

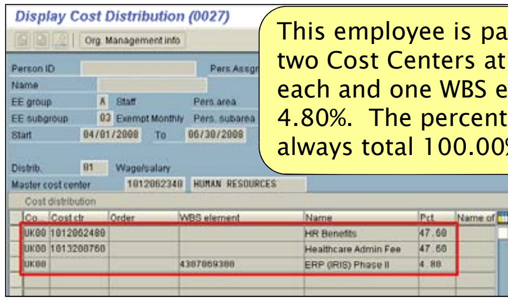
Hours used in selection period

Begin Dt	End Dt	Day	Type	Text	Hours
03/05/2008	03/05/2008	Wed	7170	VACATION	4.00000
03/20/2008	03/20/2008	Thu	7170	VACATION	1.00000
03/21/2008	03/21/2008	Fri	7170	VACATION	8.00000
03/31/2008	03/31/2008	Mon	7170	VACATION	2.00000
04/01/2008	04/01/2008	Tue	7170	VACATION	4.00000
04/02/2008	04/02/2008	Wed	7170	VACATION	7.00000
04/03/2008	04/03/2008	Thu	7170	VACATION	4.00000
04/04/2008	04/04/2008	Fri	7170	VACATION	1.00000
04/16/2008	04/16/2008	Wed	7180	FULL SAL SICK (TDL) - EMP	8.00000
04/18/2008	04/18/2008	Fri	7180	FULL SAL SICK (TDL) - EMP	2.00000

- This report may be printed also using the **Print** icon in the Standard Toolbar.

Cost Distribution Report

- The Cost Distribution infotype (1018 or 0027) in an employee's Master Data lists the cost object(s) charged for all payroll expenses and the associated percentage(s). For example:

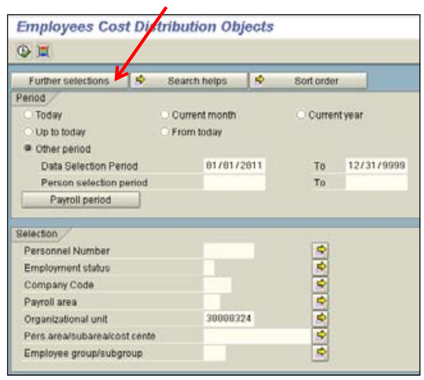


This employee is paid from two Cost Centers at 47.60% each and one WBS element at 4.80%. The percentages will always total 100.00%.

- The Cost Distribution report is just another method of displaying this information, for any time period, and for one or multiple employees.

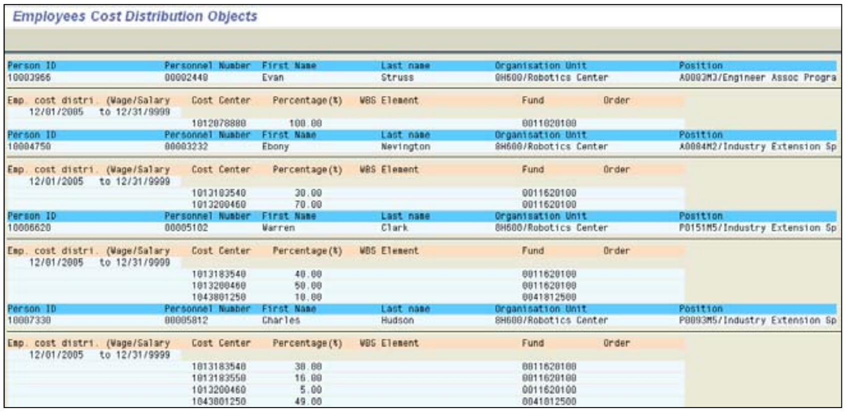
Cost Distribution Report (Continued)

1. Enter transaction code **ZCOSOBJ**
2. Select the desired **Period** or enter a **Data Selection Period**
3. Enter the appropriate **Selection** criteria
   - Identify your employee(s) by entering either a **Personnel Number** or use the **Further selections** button to add other fields to the screen (such as **Organizational Unit**); Use the **Multiple Selection** icon to enter multiple values for any of these fields, if applicable.



Cost Distribution Report (Continued)

4. Click on the **Execute** icon in the Application Toolbar



- To print the report, click on the **Print** icon in the Standard Toolbar.

Unit 3
Check for Understanding

HR_TM_320 Unit 3

Question 1 of 5

The Multiple Selection icon cannot be used when running any of the reports covered in this unit.

- True
- False

- PROPERTIES
- On passing, 'Finish' button: Goes to Next Slide
- On failing, 'Finish' button: Goes to Previous Slide
- Allow user to leave quiz: After user has completed quiz

Properties...

Edit in Quizmaker

Course Summary

- Really become familiar with the global icons and buttons addressed in Unit 1. These will come in very handy when processing the three time entry transactions for multiple employees and running various time-related reports.
  - Note: You may see these icons and buttons in other transactions not discussed in any of the three Time Management courses as well, and they work and function the same as discussed in this course.
- Creating, saving, and using selection variants when processing the three time entry transactions can greatly reduce processing time. However, this functionality is optional. Processing one employee at a time is completely acceptable as well.

Course Summary (Continued)

- There are several time-related reports available in IRIS which may be used as needed. It is strongly recommended that one or both of the payroll reports be run following the Preliminary Payroll Run to check for accuracy.
  - If you are needing a report on actual payroll charges, this is best obtained from the Business Warehouse. (This access is obtained by successfully completing the BEX_300 WBT and having that course added to your Training Plan.)

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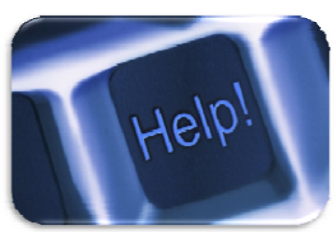
Time Management Help Websites

- myHelp HR & Payroll Help website: http://myHelp.uky.edu/rwd/HTML/HR.html
  - Contains updated and printable course manuals, Quick Reference Cards, HR/Payroll Frequently Asked Questions, a link to the HR/Payroll Reference Manual, etc.
- IRIS-HR website: http://www.uky.edu/IRIS/HR/
  - Contains the HR/Payroll Reference Manual, IRIS HR/Payroll Forms, access to the IRIS Payroll Schedules, etc.



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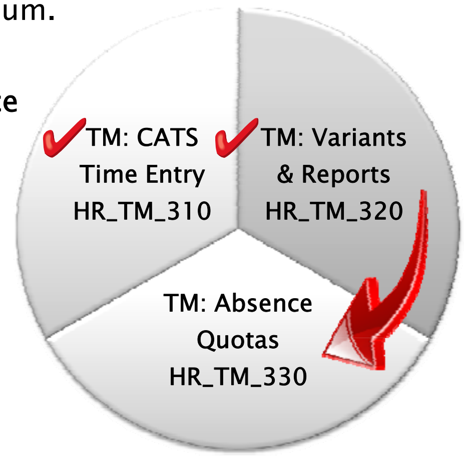
Time Management Curriculum

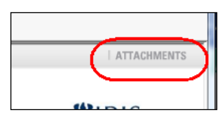
- You have now completed the second of three WBTs in the Time Management curriculum.
- Proceed to the **TM: Absence Quotas HR_TM_330** WBT.



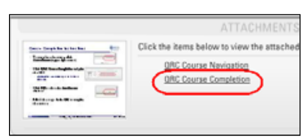
- Please advance to the last slide in this course!

Course Completion Instructions

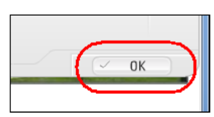
- To complete this course:
  1. Click on **Attachments** (upper-right corner)



  2. Click **QRC Course Completion** and print the QRC
     - Note: The QRC will open in a separate browser window.



  3. Click **OK** to close the **Attachments** window



  4. Follow the steps on the QRC