



# Advanced Time Learning Lab 2013

## TM-69 | TM450

TM

## Points of Interest

- 2013 Highlights
- Advanced Leave
- Coming Soon
- Substitutions
- Reporting Tools
- Negative Balances
- Ahead in 2014

Updated to new format 9/24/2020



# 2013 Work Highlights

- Provide Option to Comp Imputed Callback (Q23)
- Emergency Closing Comp (Q27)
- Incentive Leave (Q29)
- Adverse Weather (Phase #1)
  - AW Recovery from OT Comp & Same Day Exp
  - Double A/A 9545, but only 1 aging entry
  - Part-time EEs – AW Make-up in wk w/Leave
  - Overtime Offsetting for Part-time
  - Stop Holiday Prem for AA 9512 on Holiday



# 2013 Work Highlights (continued)

- State Highway Patrol/Integrated HR-Payroll System transition
- BI Reporting- Compensation Aging w/Estimated Payout Cost
- BI Reporting – FMLA aggregate workbench report
- Update Week Text
- IT7 WSR Reinstatement record end date
- Callback Eligible for Weekend Shift
- FY2013-2014 Special Leave Q55
- Investigatory Placement Leave Code
- Advanced Leave



# Advanced Leave (Intro)

- According to policy:
  - The appointing authority may advance leave not to exceed the amount an employee can accumulate during the current calendar year.
- Allowed amounts:
  - Number of accruals remaining in year \* accrual rate
- Advanced Leave Liabilities are recovered with normal accruals of Vacation & Sick, as well as immediate payments of Overtime or Gap Hrs



# Advanced Leave (What's New)

- Advanced Vacation Leave Allowed (Q31) will now generate Advanced Vacation Hrs Owed (Q36). This change is effective 1/1/2013.
- Advanced Sick Hrs Owed (Q37) that are accrued and recovered on the same day will now generate the correct net adjustment to the Q37 balance.
- T Series populates as expected:
  - T36I / T37I – Increase to liability quota
  - T36V / T37V – Recovery from liability quota
  - T36R / T37R – Remaining balance



# Advanced Leave (What's New-cont'd)

- Advanced Vacation Hrs Owed (**Q36**) and Advanced Sick Hrs Owed (**Q37**) will now show in the Leave Liabilities section of the Time Statement.
- Beginning 1/1/2014, a hard error will generate in Time Evaluation if an EE has a remaining balance for **Q36** or **Q37**.
- Two new IT 2012s are available to recover **Q36** and **Q37** liabilities with LWOP. These are relevant for outstanding liabilities at year end & if EE separates with liability balances.
  - IT2012-ZAVL
  - IT2012-ZASL



# Advanced Vacation Leave



Holiday OT Gap ..... Comp Hours



**Advanced  
Vacation  
Leave**



# Advanced Vacation Leave (cont'd)

- Allowed amount granted via IT 2013-31
  - IT2006-31 validity dates through end of calendar year
- Any hours deducting from Q31, generate an equivalent accrual to Q36
  - IT2006-36 validity dates through end of calendar year
- Recovers from Comp time, On-Call Comp and standard Vacation Leave accruals, as well as immediate payments of Overtime or Gap Hrs.





# Advanced Vacation Leave (cont'd 2)

- Allowed amount granted via IT 2013-31
  - IT2006-31 validity dates through end of calendar year.

<span>Selection dates</span> <span>Absence quotas</span> <span>Accrual information</span> <span>Attendance quotas</span>											
Totals ...	AbQ...	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	Deduction from	Deduction to	Start Date	End Date
Σ	31	Adv Vacation Leav...	Hours	9.33000	9.33000	0.00000	0.00000				
				9.33000	9.33000	0.00000	0.00000	11/18/2013	12/31/2013	11/18/2013	12/31/2013
Σ	40	Holiday Leave	Hours	48.00000	48.00000	0.00000	0.00000				
				48.00000	48.00000	0.00000	0.00000	11/18/2013	12/31/9999	11/18/2013	12/31/9999
Σ	65	Community Servic...	Hours	4.00000	4.00000	0.00000	0.00000				
				4.00000	4.00000	0.00000	0.00000	11/18/2013	12/31/2013	11/18/2013	12/31/2013



# Advanced Vacation Leave (cont'd 3)

- Any hours deducting from **Q31** generate an equivalent accrual to **Q36**

<span>Selection dates</span> <span>Absence quotas</span> <span>Accrual information</span> <span>Attendance quotas</span>											
Totals ...	AbQ...	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	Deduction from	Deduction to	Start Date	End Date
Σ	31	Adv Vacation Leav...	Hours	9.33000	1.33000	8.00000	0.00000				
				9.33000	1.33000	8.00000	0.00000	11/18/2013	12/31/2013	11/18/2013	12/31/2013
Σ	36	Adv Vacation Hrs ...	Hours	8.00000	8.00000	0.00000	0.00000				
				8.00000	8.00000	0.00000	0.00000	12/02/2013	12/31/2013	12/02/2013	12/31/2013
Σ	40	Holiday Leave	Hours	48.00000	48.00000	0.00000	0.00000				
				48.00000	48.00000	0.00000	0.00000	11/18/2013	12/31/9999	11/18/2013	12/31/9999
Σ	65	Community Servic...	Hours	4.00000	4.00000	0.00000	0.00000				
				4.00000	4.00000	0.00000	0.00000	11/18/2013	12/31/2013	11/18/2013	12/31/2013



# Advanced Vacation Leave (cont'd 4)

- Advanced Vacation Hrs Owed are recovered from Comp Time, On-Call Comp, and Vacation Leave accruals, as well as Immediate payouts for Overtime & Gap Hrs.

<span>Selection dates</span> <span>Absence quotas</span> <span>Accrual information</span> <span>Attendance quotas</span>									
Totals ...	AbQ...	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	Deduction from	Deduction
Σ	10	Vacation Leave	Hours	1.33000	1.33000	0.00000	0.00000		
				1.33000	1.33000	0.00000	0.00000	12/16/2013	12/31/999
Σ	15	Sick Leave	Hours	8.00000	8.00000	0.00000	0.00000		
				8.00000	8.00000	0.00000	0.00000	12/16/2013	12/31/999
Σ	31	Adv Vacation Leav...	Hours	9.33000	1.33000	8.00000	0.00000		
				9.33000	1.33000	8.00000	0.00000	11/18/2013	12/31/201
Σ	36	Adv Vacation Hrs ...	Hours	0.00000	0.00000	0.00000	0.00000		
				0.00000	0.00000	0.00000	0.00000	12/02/2013	12/31/201
Σ	40	Holiday Leave	Hours	48.00000	48.00000	0.00000	0.00000		
				48.00000	48.00000	0.00000	0.00000	11/18/2013	12/31/999
Σ	65	Community Servic...	Hours	4.00000	4.00000	0.00000	0.00000		
				4.00000	4.00000	0.00000	0.00000	11/18/2013	12/31/201





# Advanced Vacation Leave (cont'd 5)

- T Series (PT\_BAL00)

Pers.No.	Employee/app.name	Period	Current Date	TmTy...	Time type descript.	Σ	Number
1982021	Robert Michael Broda	201312	12/02/2013	T36I	TS Adv Vac Owed Increase		8.00
							<b>8.00</b>
1982021	Robert Michael Broda	201312	12/02/2013	T36R	Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/03/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/04/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/05/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/06/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/07/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/08/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/09/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/10/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/11/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/12/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/13/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/14/2013		Adv Vac Owed End Balance		8.00
1982021	Robert Michael Broda	201312	12/15/2013		Adv Vac Owed End Balance		8.00
							<b>112.00</b>
1982021	Robert Michael Broda	201312	12/16/2013	T36V	Adv Vac Owed Recovered		8.00
							<b>8.00</b>
							<b>128.00</b>



# Advanced Vacation Leave (cont'd 6)

- Time Statement

## Leave Quotas (hours available)

Description	Beginning	Accrued	Deducted	Paid Out	Expired	Offset	Adjustment	End Balance
Vacation Leave	0.00	1.33						1.33
Sick Leave	0.00	8.00						8.00
Holiday leave	40.00	8.00						48.00
Community Service	4.00							4.00
Adv Vac Leave Allowed	9.33		8.00					1.33

## Calculated Time Results

Description	
Regular Time Hours	112.00

## Leave Liabilities (hours owed)

Description	Beg. Liability	Increased	Recovered	Adjustment	Ending Liability
Advanced Vacation Lv	0.00	8.00	8.00	0.00	0.00



# Advanced Sick Leave



**Sick  
Leave**



**Voluntary  
Shared  
Leave**



**Advanced  
Sick  
Leave**



# Advanced Sick Leave (cont'd)

- Allowed amount granted via IT 2013-32
  - IT2006-32 validity dates through end of calendar year
- Any hours deducting from Q32, generate an equivalent accrual to Q37
  - IT2006-37 validity dates through end of calendar year
- Recovers from standard Sick Leave accruals as well as immediate payments of Overtime and Gap Hrs



# Advanced Sick Leave (cont'd 2)

- Allowed amount granted via IT 2013-32
  - IT2006-32 validity dates through end of calendar year.

<span>Selection dates</span> <span>Absence quotas</span> <span>Accrual information</span> <span>Attendance quotas</span>											
Totals ...	AbQ...	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	Deduction from	Deduction to	Start Date	End Date
Σ		32 Adv Sick Leave All...	Hours	16.00000	16.00000	0.00000	0.00000				
				16.00000	16.00000	0.00000	0.00000	11/18/2013	12/31/2013	11/18/2013	12/31/2013
Σ		40 Holiday Leave	Hours	48.00000	48.00000	0.00000	0.00000				
				48.00000	48.00000	0.00000	0.00000	11/18/2013	12/31/9999	11/18/2013	12/31/9999
Σ		65 Community Servic...	Hours	4.00000	4.00000	0.00000	0.00000				
				4.00000	4.00000	0.00000	0.00000	11/18/2013	12/31/2013	11/18/2013	12/31/2013





# Advanced Sick Leave (cont'd 3)

- Any hours deducting from Q32 generate an equivalent accrual to Q37

<span>Selection dates</span> <span>Absence quotas</span> <span>Accrual information</span> <span>Attendance quotas</span>											
Totals ...	AbQ...	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	Deduction from	Deduction to	Start Date	End Date
Σ	32	Adv Sick Leave All...	Hours	16.00000	0.00000	16.00000	0.00000				
				16.00000	0.00000	16.00000	0.00000	11/18/2013	12/31/2013	11/18/2013	12/31/2013
Σ	37	Adv Sick Hrs Owed	Hours	16.00000	16.00000	0.00000	0.00000				
				16.00000	16.00000	0.00000	0.00000	12/02/2013	12/31/2013	12/02/2013	12/31/2013
Σ	40	Holiday Leave	Hours	48.00000	48.00000	0.00000	0.00000				
				48.00000	48.00000	0.00000	0.00000	11/18/2013	12/31/9999	11/18/2013	12/31/9999
Σ	65	Community Servic...	Hours	4.00000	4.00000	0.00000	0.00000				
				4.00000	4.00000	0.00000	0.00000	11/18/2013	12/31/2013	11/18/2013	12/31/2013



# Advanced Sick Leave (cont'd 4)

- Advanced Sick Hrs Owed are recovered from Sick Leave accruals, as well as Immediate payouts for Overtime & Gap Hrs.

Selection dates		Absence quotas		Accrual information		Attendance quotas			
Totals ...	AbQ...	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	Deduction from	Deductio
Σ	10	Vacation Leave	Hours	9.33000	9.33000	0.00000	0.00000		
				9.33000	9.33000	0.00000	0.00000	12/16/2013	12/31/999
Σ	32	Adv Sick Leave All...	Hours	16.00000	0.00000	16.00000	0.00000		
				16.00000	0.00000	16.00000	0.00000	11/18/2013	12/31/201
Σ	37	Adv Sick Hrs Owed	Hours	8.00000	8.00000	0.00000	0.00000		
				8.00000	8.00000	0.00000	0.00000	12/02/2013	12/31/201
Σ	40	Holiday Leave	Hours	48.00000	48.00000	0.00000	0.00000		
				48.00000	48.00000	0.00000	0.00000	11/18/2013	12/31/999
Σ	65	Community Servic...	Hours	4.00000	4.00000	0.00000	0.00000		
				4.00000	4.00000	0.00000	0.00000	11/18/2013	12/31/201



# Advanced Sick Leave (cont'd 5)

- Error (PT\_ERL00) &
- Time Statement (ZNCTIME)

## Time Evaluation Messages Display

MessTy	Message long text	PersNo.	Employee/app.name	CD	Logical date	PA	WS rule
E7	Advanced Sick Liability Exists			WE	01/01/2014	0601	D01N08GN

### Leave Quotas (hours available)

Description	Beginning	Accrued	Deducted	Paid Out	Expired	Offset	Adjustment	End Balance
Vacation Leave	0.00	9.33						9.33
Holiday leave	40.00	16.00						56.00
Community Service	4.00							4.00
Adv Sick Leave Allowed	16.00		16.00					0.00

### Calculated Time Results

Description	
Regular Time Hours	104.00

### Leave Liabilities (hours owed)

Description	Beg. Liability	Increased	Recovered	Adjustment	Ending Liability
Advanced Sick Leave	0.00	16.00	8.00	0.00	8.00



# Advanced Sick Leave (cont'd 6)

- IT2012-ZASL (Makeup Adv Sick w/LWOP)

**Change Time Transfer Specifications (2012)**

Personal work schedule | Activity allocation | Cost assignment | External services

Personnel No	1982023	Name	Wendy Lynn Pendergraph		
EE group	A SPA Employees	Personnel ar	0601	State Auditor	
WS rule	D01N08GN MTWTF-8,SaS-0			Status	Active
Start	12/31/2013	To	12/31/2013	Chg.	12/03/2013 01024742

Time transfer specification

Time transfer type	ZASL	Makeup Adv Sick w/LWOP
Number of hours	8.00	Hours





# Advanced Sick Leave (cont'd 7)

- Error (PT\_ERL00) &
- Time Statement (ZNCTIME)

## Time Evaluation Messages Display

MessTy	Message long text	PersNo.	Employee/app.name	CD	Logical date	PA	WS rule
L5	Adv Sick Recovered with LWOP			TU	12/31/2013	0601	D01N08GN

### Leave Quotas (hours available)

Description	Beginning	Accrued	Deducted	Paid Out	Expired	Offset	Adjustment	End Balance
Vacation Leave	0.00	9.33						9.33
Holiday leave	40.00	16.00						56.00
Community Service	4.00							4.00
Adv Sick Leave Allowed	16.00		16.00					0.00

### Calculated Time Results

Description	
Regular Time Hours	104.00

### Leave Liabilities (hours owed)

Description	Beg. Liability	Increased	Recovered	Adjustment	Ending Liability
Advanced Sick Leave	0.00	16.00	16.00	0.00	0.00



# Advanced Sick Leave (cont'd 8)

- Time Statement (ZNCTIME) - January



## Time Statement

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Period: 01/01/2014 to 01/31/2014

Run Date: 12/03/2013

### Personal / Organizational Data

Name		Overtime Period	Wk - Mon (mdnt) - Sun
Personnel Number		Work Schedule	DD1ND8GN - MTWTF-8,SaS-0
Length Of Service	2.00 Months	Emp Group	A- SPA Employees
Position		Sub Area	NCD1- 7day Norm
Personnel Area	0601-State Auditor	Time Mgt Status	1 - Positive Time Recording
Org Unit Name	AUDITOR SA DSA RALEIGH E	Org Unit/Short Text	20000966/331202040100

### Leave Quotas (hours available)

Description	Beginning	Accrued	Deducted	Paid Out	Expired	Offset	Adjustment	End Balance
Vacation Leave	9.33							9.33
Holiday Comp Time	0.00	48.00						48.00
Holiday leave	56.00	48.00-						8.00
Community Service	4.00	24.00			4.00			24.00
Adv Sick Leave Allowed	8.00				8.00			0.00



# Advanced Leave (Reconciliation)

- Production Support currently reviewing year-end Advanced Leave liabilities for 2008, 2009, 2010, 2011, & 2012.
- Your agency may be contacted to assist with this reconciliation.
- Variants available for Advanced Vacation & Advanced Sick Leave reporting:
  - /ZAVANALYSIS - Advanced Vacation Analysis
  - /ZASANALYSIS - Advanced Sick Analysis



# Advanced Leave (Reconciliation cont'd)

- The year-end Vacation to Sick roll-over will now accommodate the following. Functionality is date stamped 1/1/2014.
- Part-time (half-time or greater) EEs. The appropriate proration of the 240 limit will be applied.
- EEs on Injury Leave (Z3/17) will be excluded from the rollover.
- New hard error when temporary EEs are set to negative time.
- **E9 – Temp EE & Negative Time Not Allowed**





# Advanced Leave (Reconciliation cont'd 2)

- Substitution records should be maintained keeping the EE's current Holiday Calendar as designated on IT0002 Subarea and the default ES grouping (2) and PS grouping (10).

Work schedule rule			
Work schedule rule	E01N08GN	MTWHF-8, SaS-O	ES grouping 2
Holiday Calendar ID	NC		PS grouping 10

- Subst. type 02 – Shift substitution
- 02 Shift substitution is the only type configured. 02 is defaulted and should not be changed

Subst. type	02	Shift substitution
-------------	----	--------------------

- Holiday Calendar substitutions require OSHR approval



# Advanced Leave (Reconciliation cont'd 3)

- In order to receive shift premium, an EE's WSR must be conducive to the applicable shift.
  - Night shift WSR will not receive Evening Shift Premium
  - Evening shift WSR will not receive Night Shift Premium
  - Push codes should be used for Day shift schedules
- If an employee is eligible for night shift and evening shift premium, and works hours against each shift respectively and continually, the EE's work schedule rule on IT0007 should be set up as a DAY schedule. \*Push codes should be used to generate shift compensation\*



# Advanced Leave (Reconciliation cont'd 4)

- Daily work schedule
  - Used when a FREE day should be changed to an accountable day.

Daily work schedule
Daily work schedule

- Work schedule rule
  - From – To date are designated for a shortened window and include an End Date. Should NEVER reflect high date of 12/31/9999

Work schedule rule			
Work schedule rule	E01N08GN	MTWHF-8, SaS-O	ES grouping 2
Holiday Calendar ID	NC		PS grouping 10



# Advanced Leave (Reconciliation cont'd 5)

## Issues caused by late or missing time

- Negative quota for holiday comp due to late submission/approval
- Retros due to missing time entry
- Missing Vacation/Sick accruals
- Missing Premium pay (overtime, shift, etc.)

## Reports to aid in identifying missing/late time entry:

- CATC – Time leveling Report can be used to identify missing time entries
- B0208-Late Approvals (Supervisor)
- B0209- Late Time sheets






# Advanced Leave (Reconciliation cont'd 6)

Reports are located under Time folder-CATS

## B0208 – Late Approvals

- Select Org Unit and Date Range (mandatory fields)



General Variables			
	Variable#*	Current Selection	Description
*	Organizational Unit	+20000000(0ORGUNIT) 	20000000 State of North Carolina
*	Work Date(s) (Mandatory)	02/01/2012 - 02/05/2012 	02/01/2012 - 02/05/2012
	# Days Diff Between Approved Dt and Relea	14	14
	Employee(s) PersNo. (Optional)		



# Advanced Leave (Reconciliation cont'd 7)

## Report results

- additional field selections are available

Supv Employee <sup>Δ</sup>	Organizational Unit <sup>Δ</sup>	Employee Name <sup>Δ</sup>	EE Nbr <sup>Δ</sup>	WorkDate <sup>Δ</sup>	Released date <sup>Δ</sup>	Approval date <sup>Δ</sup>	DaysDiff Between Approved Dt & Released Dt <sup>Δ=</sup>	Hours <sup>Δ=</sup>
	HHS SO HS PH EPI PREPARE & RESPONSE C	[REDACTED]	281468	02/01/2012	02/14/2012	03/02/2012	17	8.00
02/02/2012				02/14/2012	03/02/2012	17	8.00	
02/03/2012				02/14/2012	03/02/2012	17	8.00	
		[REDACTED]	1888859	02/01/2012	02/13/2012	03/02/2012	18	8.00
02/02/2012				02/13/2012	03/02/2012	18	8.00	
02/03/2012				02/13/2012	03/02/2012	18	8.00	
	HHS SO HS PH DD INFO TECHNOLOGY A	[REDACTED]	1131215	02/01/2012	02/29/2012	05/09/2012	70	8.00
02/02/2012				02/29/2012	05/09/2012	70	8.00	
02/03/2012				02/29/2012	05/09/2012	70	8.00	
	HHS SO HS PH DD STRATEGIC OPS & RISK MGT	[REDACTED]	632587	02/01/2012	02/03/2012	02/20/2012	17	8.00
02/02/2012				02/03/2012	02/20/2012	17	8.00	
02/03/2012				02/03/2012	02/20/2012	17	8.00	



# Advanced Leave (Reconciliation cont'd 8)

## B0209- Late Timesheets

- Select Org Unit and Date Range (mandatory fields)

General Variables			
	Variable <sup>△</sup>	Current Selection	Description
*	Organizational Unit	+20000000(0ORGUNIT) <input type="checkbox"/>	20000000 State of North Carolina
*	Work Date(s) (Mandatory)	02/01/2012 - 02/05/2012 <input type="checkbox"/>	02/01/2012 - 02/05/2012
	Employee(s) PersNo. (Optional)	<input type="checkbox"/>	
	# Days Diff Between Release Date and Work	14	14

## Report results

- additional field selections are available

Supv Employee <sup>△</sup>	Organizational Unit <sup>△</sup>	Employee Name <sup>△</sup>	EE Nbr <sup>△</sup>	Created on <sup>△</sup>	WorkDate <sup>△</sup>	Released date <sup>△</sup>	DaysDiff Between Release Dt & Work Dt <sup>△</sup>	Hours <sup>△</sup>
[Employee ID]	PI SS ASIS Prog Monitoring & Support	[Employee Name]	623929	02/02/2012	02/01/2012	07/30/2012	180	5.00
					02/02/2012	07/30/2012	179	8.00
					02/03/2012	07/30/2012	178	8.00
[Employee ID]	HHS SO General Counsel	[Employee Name]	709617	07/26/2012	02/01/2012	07/26/2012	176	0.75
					02/02/2012	07/26/2012	175	2.50
					02/03/2012	07/26/2012	174	0.83
[Employee ID]	JB DA 27A SUPPORT STAFF	[Employee Name]	709679	02/22/2012	02/01/2012	02/22/2012	21	8.00
					02/02/2012	02/22/2012	20	8.00
					02/03/2012	02/22/2012	19	8.00





# Advanced Leave (Reconciliation cont'd 9)

## Incorrect use of IT2013

- Retro absence reallocation; Touching Absences
- Retro WSR changes
  - Absences on FREE days
  - FDA Full day absence flag errors
- Late time entry & approvals
- Retro changes that cause end-of-year vacation to sick rollover balance adjustments





# Full Day Absence Flag

Personnel No	[REDACTED]		Name	[REDACTED]	
EE group	A	SPA Employees	Personnel ar	1401	State Controller
WS rule	D02N10_F MTWH-10,FSaS-O		Status	Active	
Start	12/28/2009	To	12/28/2009	Chg.	01/06/2010 00504028

Absence	
Absence type	9000 Approved Leave
Time	- <input type="checkbox"/> Prev.day
Absence hours	10.00 <input checked="" type="checkbox"/> Full-day
Absence days	1.00
Calendar days	1.00
Quota Used	10.00 Hours

Before

After

Personnel No	[REDACTED]		Name	[REDACTED]	
EE group	A	SPA Employees	Personnel ar	1401	State Controller
WS rule	D24W24FX Day Flex		Status	Active	
Start	12/28/2009	To	12/28/2009	Chg.	01/06/2010 00504028

Absence	
Absence type	9000 Approved Leave
Time	- <input type="checkbox"/> Prev.day
Absence hours	24.00 <input checked="" type="checkbox"/> Full-day
Absence days	1.00
Calendar days	1.00
Quota Used	10.00



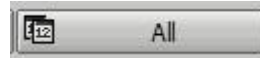
# Researching and Reporting Negative Quota Balances

- PT50
- PT\_BAL00
  - T series
- Infotype 9901
  - Relative Subtype

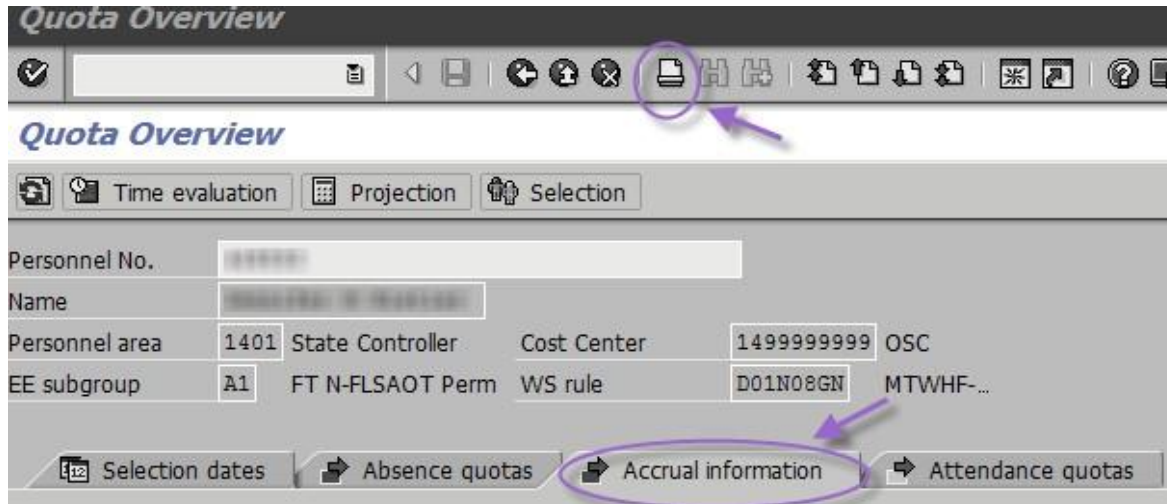


# PT50

- Always select ALL



- Accrual information tab selection, then print



# PT50 (cont'd)

- Quota type selection, then Filter

*Quota Overview*

Date	Quota type	Quota text	Unit
02/01/2008	10	Vacation Leave	Hours
02/01/2008	15	Sick Leave	Hours
02/01/2008	65	Community Service Leave	Hours
02/15/2008	10	Vacation Leave	Hours
02/15/2008	15	Sick Leave	Hours
02/20/2008	40	Holiday Leave	Hours
02/29/2008	20	Overtime Comp Time	Hours



# PT50 (cont'd 2)

- Use appropriate quota type, then Enter

**Quota Overview**

Accrual information

Personnel number:  Determine values for filter criteria

Generate Reference date

Select. Quota type  to

Insert appropriate quota type

Date	Q	Quo
02/01/2008	1	Vac
02/01/2008	1	Sick
02/01/2008	6	Com
02/15/2008	1	Vac
02/15/2008	1	Sick
02/20/2008	4	Holic
02/29/2008	2	Ove
03/07/2008	2	Ove
03/14/2008	2	Ove
03/17/2008	1	Vac
03/17/2008	1	Sick
03/28/2008	2	Ove
04/15/2008	1	Vac
04/15/2008	1	Sick
04/18/2008	2	Ove
04/19/2008	2	Ove
04/24/2008	2	Overtime Comp Time
04/25/2008	2	Overtime Comp Time

Hours 3.51000 0.00000 3.51000  
Hours 9.00000 0.00000 9.00000





# PT50 (cont'd 3)

**Quota Overview**

Personnel number: [REDACTED]  
 Generate: 11/01/1997 - 12/31/9999  
 Reference date: 08/14/2012

Date	Quota type	Quota text	Unit	Curr. generated	Accrued	Transferred
06/26/2012	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
06/04/2012	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
05/05/2012	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
04/28/2012	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
03/07/2012	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
02/14/2012	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
02/11/2012	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
01/31/2012	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
01/25/2012	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
01/24/2012	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
12/24/2011	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
12/23/2011	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
12/17/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
12/14/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
12/03/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
11/27/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
11/26/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
10/26/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
10/25/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
10/12/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
10/04/2011	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-
08/06/2011	40	Holiday Leave	Hours	8.00000	0.00000	8.00000
08/02/2011	40	Holiday Leave	Hours	8.00000-	0.00000	8.00000-



# PT\_BAL00 & “T Series” of Time Types

- Apply appropriate period and dates as needed
- Select Personnel Number
- Apply applicable day balance T series
- T \*\* A
- (Where ‘\*\*’ represents quota type & ‘A’ represents type of behavior, in this case accruals)

**Cumulated Time Evaluation Results: Time Balances/Wage Types**

Further selections Search helps Sort order Org. structure

Period

Today  Current month  Current year  
 Up to today  From today  
 Other period

Period  To

Payroll period

Selection

Personnel Number    
Time recording administrator

Selection Conditions

Day balances  to    
 Cumulated balances  to    
 Time wage types  to



# PT\_BAL00 & “T Series” of Time Types (cont’d)

- T20**U** - Overtime comp USED
  - T20**A** - Overtime comp ACCRUED
  - T20**R** - Overtime comp REMAINING BALANCE
  - T20**O** - Overtime comp OFFSET
  - T20**P** - Overtime comp PAID
  - T20**X** - Overtime comp EXPIRED
- ***The Quota Type is interchangeable***





# PT\_BAL00 & “T Series” of Time Types (cont’d 2)

Quota Type	Quota Text
10	Vacation Leave
15	Sick Leave
20	Overtime Comp Time
21	Gap Hrs Comp Time
22	Holiday Comp Time
23	Callback Comp Time
24	Travel Compensatory Time
26	On Call Comp Time
27	Emergency Closing Comp
29	Incentive Leave
40	Holiday Leave
50	Bonus Leave
55	Special Leave
61	Adv Weather Hrs Owed
65	Community Service Leave
80	Received Shared Leave
85	Military Leave (Training)



# Magic Formula

$$PT50 = T**R = IT 9901$$



# Quota Overview

Time evaluation Projection Selection

Personnel No.  
Name  
Personnel area  
EE subgroup

## Day balances

Data select. period 08/01/2012 - 08/31/2012

Pers.No.	Empl/appl.name	Period	Current Date	TmType	Time type descript.	ΣNumber
201208		08/01/2012	08/01/2012	T20R	OT Comp End Balance	9.00
201208		08/02/2012	08/02/2012			
201208		08/03/2012	08/03/2012			
201208		08/04/2012	08/04/2012			
201208		08/05/2012	08/05/2012			
201208		08/06/2012	08/06/2012			
201208		08/07/2012	08/07/2012			
201208		08/08/2012	08/08/2012			
201208		08/09/2012	08/09/2012			
201208		08/10/2012	08/10/2012			
201208		08/11/2012	08/11/2012			
201208		08/12/2012	08/12/2012			
201208		08/13/2012	08/13/2012			
201208		08/14/2012	08/14/2012			

## Overview Leave & Liability Aging (9901)

Personnel No.  Name   
 EE group  SPA Employees Personnel ar  State Controller  
 WS rule  MTWH-9,F-4,SaS-O Status Active  
 Choose  01/01/1800 To  12/31/9999 STy.  6000

Start Date	End Date	Time T...	Hours	On-Call R	Time Eval ...	Payout Date
07/26/2013	07/26/2013	6000	6.00	0.00	07/27/2012	
07/19/2013	07/19/2013	6000	3.00	0.00	07/20/2012	
04/26/2013	04/26/2013	6000	3.00	0.00	04/27/2012	
04/26/2013	04/26/2013	6000	3.00-	0.00	05/08/2012	
04/19/2013	04/19/2013	6000	5.00	0.00	04/20/2012	
04/19/2013	04/19/2013	6000	1.00-	0.00	05/07/2012	
04/19/2013	04/19/2013	6000	4.00-	0.00	05/08/2012	



# Ahead in 2014

## WSR Finder

Personnel No  Name

EEGroup  SPA Employees PersA  State Controller

EESubgroup  FT N-FLSAOT Perm Statu Active

Start  To

Work schedule rule    

Work schedule rule

Time Mgmt status

OT Period

Part-time employee

Filter Criteria for Search

	Expand/Collapse	Week	Weekday	Work Start	Start +/-	End of work	End +/-	Planned working hrs
		Week 1						
			Monday					
			Tuesday					
			Wednesday					
			Thursday					
			Friday					4.00
			Saturday					
			Sunday					



# Ahead in 2014 (cont'd)

Ability to set  
default period  
for PT50

**Quota Overview**

Time evaluation Projection Selection

Personnel No.

Name

Personnel area 1401 State Controller

EE subgroup A1 FT N-FLSAOT Perm WS rule D02N10\_F MTWH-1 ...

Selection dates Absence quotas Accrual information Attendance

General Overview

Quota type	Entitlement	Remaining	Unit
Absence quotas	2,608.24000	1,338.49000	Hours

Selection intervals

Deduction period 09/18/2006 - 04/30/2013

Validity period 09/18/2006 - 04/30/2013

Generation period 09/18/2006 - 04/30/2013

From Today Current Period Calendar year **All**





# Ahead in 2014 (cont'd 2)

IT2006

Clean-up

**Quota Overview**

Time evaluation Projection Selection

Personnel No.

Name

Personnel area 1401 State Controller Cost Center 1499999999 OSC

EE subgroup A1 FT N-FLSAOT Perm WS rule D02N10\_F MTWH-1...

Selection dates Absence quotas Accrual information Attendance quotas

Exp	Tot...	A...	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	Deduction from	Deduction to	Start Date	End Date
			20 Overtime Comp Time	Hours	726.25000	0.00000	567.25000	159.00000				
					726.25000	0.00000	567.25000	159.00000	12/07/2007	12/31/9999	12/07/2007	12/31/9999
			22 Holiday Comp Time	Hours	26.00000	0.00000	26.00000	0.00000				
					26.00000	0.00000	26.00000	0.00000	01/01/2008	12/31/9999	01/01/2008	12/31/9999
			40 Holiday Leave	Hours	534.00000	32.00000	502.00000	0.00000				
					534.00000	32.00000	502.00000	0.00000	12/29/2007	12/31/9999	12/29/2007	12/31/9999
					0.00000	0.00000	0.00000	0.00000	12/30/2007	12/31/9999	12/30/2007	12/31/9999
					0.00000	0.00000	0.00000	0.00000	01/01/2008	12/31/9999	01/01/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	01/21/2008	12/31/9999	01/21/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	02/20/2008	12/31/9999	02/20/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	04/26/2008	12/31/9999	04/26/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	06/04/2008	12/31/9999	06/04/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	08/02/2008	12/31/9999	08/02/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	10/12/2008	12/31/9999	10/12/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	10/28/2008	12/31/9999	10/28/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	10/29/2008	12/31/9999	10/29/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	11/24/2008	12/31/9999	11/24/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	11/25/2008	12/31/9999	11/25/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	11/26/2008	12/31/9999	11/26/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	12/02/2008	12/31/9999	12/02/2008	12/31/9999
					0.00000	0.00000	0.00000	0.00000	12/20/2008	12/31/9999	12/20/2008	12/31/9999

