HR Hourly Timekeeper
Course Purpose

To provide training participants with an overview of the Hourly Timekeeper process in the UC Flex system.
Role Purpose

Role

• Decentral Hourly Time Keeper
• This role runs reports, records changes and displays time sheets for non-exempt employees for accurate payroll.
Course Objectives

At the conclusion of this course you will be able to:

• Define common Hourly Time terminology
• Understand the UC Flex Hourly Time Sheet workflow
• Identify key benefits
• Run and interpret time reports
• Edit/Display non-exempt employee’s time
• Know where to obtain continual support
Course Agenda

- Hourly Time Administration Overview
- Time Administration Reports
- Timesheet editing
- Timesheet display
Overview
Terminology

- CATS – Cross Application Time Sheet.
- Data Entry Profile – The layout of the data entry screen and data entry factors.
- Absence and Attendance Types – VAC or SCK
- Wage Types – 9FML or 9WRK
- Quota Balances – Leave time available for an employee.
- Work Schedule – The days and times an employee is scheduled to work.
- Time Pair – Clock IN and clock OUT times.
Hourly Time Process

- Hourly employee clocks in and out

- Hourly Time Keeper run exception report (ZHPT_HRLY_EXC_RPT)

- Hourly Time Keeper edits employee time sheet as necessary (CAT2)

- Hourly Time Keeper and Hourly Time Approver audit time sheets (CATS_DA)

- Hourly Time Keeper re-run exception report (ZHPT_HRLY_EXC_RPT)

- Hourly Time Approver approves time sheets (ZHPT_APPROVE_HOURLY)

- Payroll audits and processes time sheets
Key Benefits

• Daily detail in UC Flex
• Time off entries are only accepted if the balance is available
• Timekeepers make their own corrections
• Extended time to edit and approve time data prior to payroll processing
• Reporting capabilities including data exports to spreadsheets
Time Maintenance Basics

Derived clock pairs (Missed Clocks)

- Generally missed IN clocks are shown as 00:01

<table>
<thead>
<tr>
<th>Date</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/23</td>
<td>08:00</td>
<td>16:30</td>
</tr>
<tr>
<td></td>
<td>00:01</td>
<td>16:30</td>
</tr>
</tbody>
</table>

- Generally missed OUT clocks are shown as 23:59

<table>
<thead>
<tr>
<th>Date</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/24</td>
<td>08:00</td>
<td>16:30</td>
</tr>
<tr>
<td></td>
<td>08:00</td>
<td>23:59</td>
</tr>
</tbody>
</table>
Common Absence and Attendance Codes

• REG – Regular Time Worked
• VAC – Vacation
• SCK – Long Term Sick
• JURY – Jury Duty
• CTE – Comp. Time Earned
• CTT – Comp. Time Taken

For a current list of all absence and attendance codes go to:
http://www.uc.edu/content/dam/uc/af/controller/payroll/docs/AAPayCodes.pdf
Reporting

Running the Exception Report will identify these errors:

- **Missing Clock IN or OUT**: When an employee fails to clock in or clock out also known as Derived Time.
- **Missing Time**: When there is no attendance or absence data entered on a scheduled workday.
- **Hours Compared to Schedule**: Time above or below scheduled time.
Hourly Time Exception Report

- Running the Exception Report is required for both Keeper and Approver
- One suggestion is to run the report every Monday morning
Hourly Time Exceptions Report

(ZHPT_HRLY_EXC_RPT)

Click on the type of Reporting Period you want to view.

If “Key Date” is chosen, only one date field will appear.

Enter the Personnel Number or

Enter the 8 digit Organizational code
Hourly Time Exceptions Report

(ZHPT_HRLY_EXC_RPT)

If you choose “Other Period”, the start and end dates need to be entered.

Enter the Personnel Number or

Enter the 8 digit Organizational code
If you choose “Other Payroll Period” enter the Period

Enter the Personnel Number
or

Enter the 8 digit Organizational code
The report will list the clock entries to be edited.
Convert to Excel

From List ➔ Export click Spreadsheet
Exercise 1

Run Hourly Time Exceptions Report

(ZHPT_HRLY_EXC_RPT)
Basic Time Maintenance
Record Locking
Keeper and Approver

Hourly Time Keeper
• When a Timekeeper locks a record, the system will alert the Approver as to which records are locked and who is locking the record.
• The record must be unlocked for Approval.

Hourly Time Approver
• When an Approver is approving an employee’s time, the record will be locked for all other access.
• One suggestion is that Approvers coordinate with the Timekeepers a predetermined time when they plan to approve employee records.
If an employee’s timesheet is locked when they clock IN or OUT, the IN or OUT time clocks are stored and processed every 10 minutes and will appear as soon as the record is unlocked.

When the employee clocks IN or OUT, they will not be informed that their timesheet is being locked, they will just see that the clock IN or OUT was successful since it will eventually be added to their record.
Record Locking Payroll

- All records must be unlocked for the initial step of Payroll.
- Time Keepers and Approvers MUST stay out of timesheets until the close of business that day.
- Approval deadline date/times will be publicized.
- Timekeepers and Approvers will still be able to run the auditing reports since they don’t lock records.
Hourly Work Schedules

Every hourly employee must have an assigned work schedule.

Example: F001063A

• Type of Schedule
  o Full Time (F)
  o Part Time (P)
  o Rotating (R) Public
    Safety Only
  o Varies (V)

• Meal Break
  o 00 = No Meal Break
  o 30 = 30 minutes
  o 60 = 60 minutes
  o 90 = 90 minutes

• First Workday of Workweek
  o 1 = Sunday
  o 2 = Monday
  o 3 = Tuesday
  o 4 = Wednesday
  o 5 = Thursday
  o 6 = Friday
  o 7 = Saturday

• Start time of first workday
  o 06 = 6am
  o 3 = :30
  o A or P

• Flex Schedules with Meal Breaks are now available.
• Refer to the Payroll Operations site of the Office of the Controller webpage.
Meal Breaks

- Meal breaks on work schedules are unpaid and begin 5.5 hours after the start time of the shift.
- Meal breaks built into schedules vary depending on the schedule.
- The possible breaks are:
  - No meal break
  - 30 minute meal break
  - 45 minute meal break
  - 60 minute meal break
  - 90 minute meal break
Meal Breaks

• Meal Break codes have been created to account for changes in the meal breaks without changing the actual clock times.

• Since these codes can be reported on in the CATS-DA Display Working Times report, departments will be able to easily identify when an employee altered their lunch break.
Meals Breaks – WKML

• **WKML** is used to indicate, in number of hours, that the employee worked through their meal break.

• If the existing Time Pair has an Account Line Override or a Work Tax Area override assigned, the same override will be applied to the hours.

**Example:**

• Employee normally takes a 30 min meal and worked through lunch in order to leave earlier.

• Timekeeper should enter WKML for 0.50 hours.

• The 0.50 hours will be added to the existing Time Pair and factor in the weekly overtime calculations.
Meal Breaks – MEAL

- **MEAL** is to indicate, in number of hours, that employee took a longer meal break or simply took a meal break when no break was scheduled.
- The number entered will deduct from the overall time.

**Example:**

- Employee normally takes a 30 min meal and leaves at 2:30pm.
- Employee takes a 60 min meal and leaves at 3pm.
- To prevent 30 min of OTP from being created, Timekeeper should enter MEAL for 0.50 hours.
- The 0.50 hours will reduce the REG and not count towards OTP.
Data Entry Codes: CLOE & CLON

• New codes for when UC is closed
  – CLOE (UC Closed/Essential) – To be used for time periods when essential employees are at work during UC closures. Will automatically be paid accordingly to contractual language or UC policy.
  – CLON (UC Closed/Non-Essential) – To be used for time periods when non-essential employees are not at work during UC closures. Will be paid as ABS (paid leave).
  – Departments are responsible for knowing who is essential and non-essential.
Data Entry Codes: HOL

HOL hours will be entered by Payroll Operations two weeks prior to a holiday.

NOTE:

• HOL will only be entered if employee was scheduled to work on the holiday.
• If employee was not scheduled to work on the holiday, timekeeper will need to manually enter the hours.
CAT2 Navigation
Enter Search Criteria

Select the Pencil

Enter the desired Data Entry Profile uc_hrly for an Individual Employee uc_hrly2 for Multiple Employees

Enter a date for the week you want to edit.

If uc_hrly is used enter the Personnel Number
• **Save** – This will save all you changes to the employee’s time sheet.

• **Long Text** – Select this if you want to add any notes or explanations to a particular time entry.

• **Check Entries** – This will run a quick check of the time entries you made for any potential errors.

• **Reset Entries** – Selecting this will undo all entries made or deleted before you saved anything.

• **Work Schedule** – Select this button to view the employee’s weekly work schedule.

• **Quota Balance** – Select this button to view the employee’s available quota balances.

• **Previous Screen/Next Screen** – Select either button to move forward or back one week.
Work Schedule and Quota Balances

When finished reviewing the information click **Cancel**.
Long Text Entry

When entering comments, be sure not to violate HIPAA policy. If in doubt, leave it out.

Add free form text message here. Example: "Employee requested to paid out all his Comp Time"
Edit Derived Clock Pairs (Missed Clocks)

In this case, employee arrived late and failed to clock IN.

First delete the derived clock time "00:01"
## Missing Time

**Time Sheet: Data Entry View**

- **Personnel Number**: 60075  
- **Fonda Henry**  
- **Cost Ctr**: 

**Data Entry Period**: 05/20/2012 - 05/26/2012

### Data Entry Area

<table>
<thead>
<tr>
<th>LT</th>
<th>A/A</th>
<th>Wa</th>
<th>Total</th>
<th>Tax</th>
<th>A</th>
<th>05/20 From</th>
<th>To</th>
<th>05/21 From</th>
<th>To</th>
<th>05/22 From</th>
<th>To</th>
<th>05/23 From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>REG</td>
<td></td>
<td></td>
<td>34.15</td>
<td></td>
<td></td>
<td>410:00</td>
<td>14:00</td>
<td>6.15:00</td>
<td>01:06:10</td>
<td>4.50:09:30</td>
<td>14:30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>REG</td>
<td></td>
<td></td>
<td>7.82</td>
<td></td>
<td></td>
<td>7.82:06:11</td>
<td>14:30</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>

- **To report Vacation time**, enter **vac** in the **A/A column**
- **Enter the number of vacation hours under the date column on the vac row.**
Time Above or Below Scheduled Time

<table>
<thead>
<tr>
<th>Personnel Number</th>
<th>60075</th>
<th>Fonda Henry</th>
<th>Cost Ctr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Entry Period</td>
<td>05/20/2012 - 05/26/2012</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Data Entry Area

<table>
<thead>
<tr>
<th>LT</th>
<th>A/A</th>
<th>Wa</th>
<th>Total</th>
<th>Tax</th>
<th>A</th>
<th>05/20</th>
<th>From</th>
<th>To</th>
<th>05/21</th>
<th>From</th>
<th>To</th>
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<th>From</th>
<th>To</th>
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<tr>
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<tr>
<td>REG</td>
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<td>0:01</td>
<td>06:10</td>
<td>4.50</td>
<td>09:30</td>
<td>14:30</td>
</tr>
<tr>
<td>REG</td>
<td></td>
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<td>7.82</td>
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<td></td>
<td></td>
<td></td>
<td>7.8206</td>
<td>11:14:30</td>
<td>3.50</td>
<td>06:00</td>
<td>09:30</td>
<td>8</td>
</tr>
</tbody>
</table>

Cost Ctr: [紅色框](8)

Work Schedule: [綠色框](4)

Quota: [黃色框](1)

Money: [綠色框](4)
Meal Break Codes

For meal break codes no time clocks need to be added, only the time in the date column.
Advanced Time Maintenance
FMLA and Workers Compensation

- Entries made for hourly and monthly employees using Data Entry Profiles UC_FMLA and UC_WORK using codes 9FML and 9WRK in the Wage Type column of the timesheet.
- If employee is active, regular absences (SCK, STS, VAC, etc...) still need to be entered using the appropriate data entry profile.
- If departments want to, they can go back 6 months, per normal retroactivity guidelines, and enter FMLA/WORK hours.
- Recorded FMLA/WORK hours can be reported on using the new “Display Working Times” transaction. (CATS_DA)
Leave of Absence (without pay)

• For employees in an inactive status (i.e. “Leave of Absence without Pay”), system will not allow an absence or attendance to be entered.

• Do not enter ‘no pay’ absence codes if you know or suspect the employee is going to be placed in an inactive status. If nothing is entered, nothing will be paid so employee won’t be overpaid.
Data Entry Profiles

- UC_FMLA - use code 9FML
- UC_WORK - use code 9WRK
Data Profile Selection

Use Data entry Profiles:
- UC_Work for Workers Comp.
- UC_FMLA for FMLA
Workers Comp and FMLA Entry

<table>
<thead>
<tr>
<th>Personnel Number</th>
<th>5214</th>
<th>Kelly Judith A.</th>
<th>Cost Ctr</th>
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<tr>
<td>Data Entry Period</td>
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</table>

<table>
<thead>
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<th>Wa...</th>
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<th>07/27</th>
<th>07/28</th>
<th>07/29</th>
<th>07/30</th>
<th>07/31</th>
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<tbody>
<tr>
<td>REG</td>
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<td>8</td>
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<td>0</td>
<td>0</td>
<td>8</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VAC</td>
<td>39.31</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9FML</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>8</td>
</tr>
</tbody>
</table>

Layout for CATS Data Entry Profiles is for an entire month.
Data Entry Codes: DBL, SH2, SH3

- Double overtime (DBL) will automatically be created for AFSCME, IUOE and ONA personnel, per contractual language.
  - If employee wants Double Comp Time Earned (DCE), DCE must be entered for the time period that is to be paid as DBL. UC Flex will recognize the DCE and not create the DBL.
- Shift differentials (SH2 and SH3) will automatically be created.
  - SH2 = 6pm – 11pm
  - SH3 = 11pm – 6am
  - Any Work Tax Area or Account Line Override assigned to the Time Pairs between 6pm and 6am will be automatically transferred to the shift differential as well
Data Entry Codes: CLB and CLBC

CLB (Call Back Pay) will be automatically paid, per contractual language.

- Just change time pair from REG to CLB.
- If employee wants to have Comp Time instead of pay, use new attendance code CLBC (Call Back Comp) instead.
CLB needs to be entered on a new row, clock times need to be removed from the REG line and added to the CLB line.
Prerequisites for Overtime Pay and Account Line Overrides

• Timekeeper should have a basic understanding of what hours will count towards overtime.
• Account Line Overrides have been created.
Overtime Pay

![Time Sheet: Data Entry View](image)

<table>
<thead>
<tr>
<th>Personnel Number</th>
<th>Barrett Tina</th>
<th>Cost Ctrl</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Entry Period</td>
<td>07/22/2012 - 07/28/2012</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Data Entry Area</th>
<th>LT</th>
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<th>W...</th>
<th>Total</th>
<th>Ta...</th>
<th>A...</th>
<th>07/22</th>
<th>From</th>
<th>To</th>
<th>07/23</th>
<th>From</th>
<th>To</th>
<th>07/24</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>REG</td>
<td></td>
<td>31.88</td>
<td></td>
<td></td>
<td></td>
<td>15.98</td>
<td>00:01</td>
<td>16:30</td>
<td></td>
<td></td>
<td></td>
<td>08:00</td>
<td>16:30</td>
</tr>
<tr>
<td></td>
<td></td>
<td>VAC</td>
<td></td>
<td>8</td>
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<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>SCK</td>
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<td></td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>05:00</td>
<td>16:30</td>
</tr>
</tbody>
</table>
# Account Line Override

![Time Sheet: Data Entry View](image)

Click the matchcode button to view possible account line overrides.
Account Line Override

Only the active Account Line Overrides are displayed. Double click on the line to be used.
View Account Line Override

<table>
<thead>
<tr>
<th>Date</th>
<th>From</th>
<th>To</th>
<th>Date</th>
<th>From</th>
<th>To</th>
<th>Date</th>
<th>From</th>
<th>To</th>
<th>RecFund</th>
<th>Rec. CCtr</th>
<th>Rec. FuncAr</th>
</tr>
</thead>
<tbody>
<tr>
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<td>8:00</td>
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<td>17:00</td>
<td>05/26</td>
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<td>0:00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/26</td>
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<td>17:00</td>
<td>05/26</td>
<td>7:08</td>
<td>16:00</td>
<td></td>
<td></td>
<td></td>
<td>C100001</td>
<td>4500107000</td>
<td>8</td>
</tr>
</tbody>
</table>

To view the account line string, click and drag the bottom control bar to the right.
Tax Override

Create a new REG line when assigning a Work Tax Area override, otherwise, all REG entries in the same row as the override would be assigned the same override.
Other Entry Types

To account for all of the employees time, some departments enter AWO codes and other discipline/attendance tracking codes, as appropriate.
Clock Time Overlaps

- While maintaining the timesheet, you might cause an overlap to occur.
- All attendance codes require clock times and cannot overlap.
- An error will be displayed if there are no clock times or overlapping occurs.
- Negative numbers can’t be entered.
Clock Time Overlaps
Error Overlapping Times

Display Messages

<table>
<thead>
<tr>
<th>Personnel No.</th>
<th>Name</th>
<th>Date</th>
<th>Status</th>
<th>Type</th>
<th>Error Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>61911</td>
<td>Fonda Jane</td>
<td>05/24/2012</td>
<td>⬤⬤⬤</td>
<td>E</td>
<td>Clock times cannot overlap on 05/24/2012</td>
</tr>
</tbody>
</table>
**Corrected Overlapping Clocks**

![Time Sheet: Data Entry View](image)

Correct time entries without overlaps
Exercises 2 and 3

Employee Time Sheets (CAT2) – Single
Employee Time Sheets (CAT2) – Multiple
CATS_DA Report
CATS_DA

• NOTE: Do not run these reports without detailed selection criteria.
• Use this procedure to report on time data recorded.
• Run when CAT2 Time Entry has been completed.
• By saving variants from the main selection screen, several customized reports can be created for a variety of purposes, like vacation, Overtime tracking, etc.
• Several standard variants have been created to run specific reports. They all begin with "0_". When you save your own variants please do not use that prefix.
CATS_DA Report

Click to select a report variant.
General Available Reports

Double click on a report variant

Variant catalog for program RCATS.DISPLAY.ACTIVITIES

<table>
<thead>
<tr>
<th>Variant name</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0_DIS/ATT CODE</td>
<td>Discipline &amp; Attendance Codes</td>
</tr>
<tr>
<td>0_EE HOURS</td>
<td>Hrs that make up employee pay</td>
</tr>
<tr>
<td>0_FMLA</td>
<td>Family Medical Leave Act FMLA</td>
</tr>
<tr>
<td>0_FMLA + WORK</td>
<td>FMLA &amp; Worker's Compensation</td>
</tr>
<tr>
<td>0_WORKERS COMP</td>
<td>Worker's Compensation</td>
</tr>
<tr>
<td>INIT</td>
<td>Initial screen for CATS_DA</td>
</tr>
<tr>
<td>PARALLEL EES</td>
<td>Parallel Clocking Employees</td>
</tr>
</tbody>
</table>
CATS_DA Search Criteria

Click to run the report

Enter search criteria person or organizational unit

Click to enter more than one value for a field

Do not run this report without detailed selection criteria
CATS_DA Reports

Discipline/Attendance Codes Report

FMLA and Work Report
### CATS_DA Reports

**All Hours Except Discipline/Attendance Report**

#### Display Working Times

<table>
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</table>

**Note:** Some dates may not have complete working times.
Exercise 4
Display Working Times
(CATS_DA)
ZHPT_HRLY_AUDIT
Report
Use this procedure to run a report to audit time entries that have been entered into CATS for individual employees.
ZHPT_HRLY_AUDIT Report

Use default “Other Period” and enter a date range.
ZHPT_HRLY_AUDIT

Report

Select to run the report

Enter the Personnel Number.

Audit Report for Time Entries

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<tr>
<th>Period</th>
<th>Reporting Period</th>
<th>Other Period</th>
<th>07/22/2012 - 08/04/2012</th>
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<td>Selection Criteria</td>
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Exercise 5
Audit Report for Time Entries
ZHPT_HRLY_AUDIT
Time Evaluation Results (PT_BAL00)
Time Evaluation

• Time Evaluation is used by Payroll to evaluate time entry and maintain quotas.
• The results will be used to generate employee pay, accruals, etc.
• The input of raw time data is evaluated by business rules based upon union and University regulations.
Reporting Prerequisites

- Time has been entered via transaction CAT2.
- Time has been approved.
- Payroll Operations has transferred the Time to the employee's master record (Infotype 2001 or 2002, Absences or Attendances).
- Time Evaluation has been run. To ensure accuracy, do not attempt to run this report until the pay date or later.
Report Variants for PT_BAL00

<table>
<thead>
<tr>
<th>Variant name</th>
<th>Short Description</th>
<th>E</th>
<th>P</th>
<th>Chang</th>
</tr>
</thead>
<tbody>
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<td>0_ALL HOURS</td>
<td>All hours sent to payroll</td>
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<td>X</td>
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<tr>
<td>0_PAID OTP DBL</td>
<td>All OTP, HOT, or DBL created</td>
<td>A</td>
<td>X</td>
<td>SUTTL</td>
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<tr>
<td>0_PAID SHIFT</td>
<td>SH2 and SH3 Hours</td>
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<td>0_QUOTA ACCR</td>
<td>VAC, SCK, STS and CTT Accruals</td>
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<td>X</td>
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<td>Historical Quota Balances</td>
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<td>0_VAC/SCK MAX</td>
<td>Vacation and Sick Max Limits</td>
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<td>X</td>
<td>SUTTL</td>
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</table>
All Hours Sent to Payroll Report
All OTP, HOT or DBL Created Report
Resources

• For UC Flex transaction procedures & role access:
  – UC Flex Training Help website help.ucflex.uc.edu
  – Business Core Systems Website – Reference Guides
  – Email UCFlex@uc.edu

• For business process questions:
  – Contact your local Business Office
  – Contact Payroll Operations: ucflexpa@uc.edu
  – https://www.uc.edu/af/controller/payroll.html
  – Phone: 513-556-2451

• For technical support:
  – Contact your Local IT Support
  – If you do not have Local IT Support, go to UCIT and fill out a Help Ticket

• For training related questions:
  – Staff Success Center (SSC)
    » Email hrlearning@uc.edu
    » Phone 513-558-4772