HRMS Training Documents

Work Schedule Substitution

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
11/1/04	Marie Dunlap	Initial Draft
11/17/04	Emilie Miller	Edit 1
11/16/05	lleana Maldonado	Update
12/12/06	Kelly Welsh	Update added IT 2003 instructions
1/3/2007	Kelly Welsh	Added description of Icons.

State of Washington HRMS

PA61

Title: Work Schedule Substitution Processes : Sub-Processes : HRMS Training Documents

File name: Version: SME Approved Script WORK_SCHEDULE_SUBSTITUTIO Last Modified: 1/7/2009 3:42:00 PM N.DOC Reference Number:

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Purpose

Use this procedure to record a work schedule substitution to complete accurate time recording for an employee.

Trigger

• A work schedule substitution is needed to record leave (paid or unpaid) on a scheduled day off.

Prerequisites

Employee has been hired and is active in HRMS.

Menu Path

• Human Resources \rightarrow Time Management \rightarrow Administration \rightarrow Time Data \rightarrow Maintain

Transaction Code

PA61

Helpful Hints

There are two ways to update the work schedule. If the dates are <u>not consecutive</u> it maybe easier to use transaction code **PA61** and access the Month view. If the dates are <u>consecutive</u>, it may be easier to use transaction code **PA61** and access the **Substitution** (2003) Infotype.

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error	Example: Make an entry in all required fields. Action: Fix the problem(s) and then click (Enter) to proceed.
Warning	Example: DRecord valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click (Enter) to proceed.
Confirmation	Example: Save your entries. Action: Perform the required action to proceed.

Procedure

- Steps 1 10 describe how to complete a work schedule substitution for nonconsecutive dates.
- Steps 11 24 describe how to complete a work schedule substitution for consecutive dates.
- 1. You have started the transaction using the menu path or transaction code **PA61**.

Maintain HR Master Data

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🔊 🗈 Maintain Time Data	
🗋 🖉 🛍 🔝 🚮 List entry 🛅	Week 🔯 Month 🔯 Year
Find by Collective search help Search term Free search	Personnel no. 40000593 Name Smith Alan PersArea 3510 St School for the Blind EEGroup 1 Temporary PSubarea 00HN Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active Working times Additional account assignments Time quotas Time mana Image: Status Image: Status
	Time Events Today Curr.week Overtime All Current month Substitutions From curr.date Last week Availability Up to Today Last month Time Transfer Specifications Current Period Current Year Employee Remuneration Info Choose Direct selection Infotype Monthly Calendar

2. Complete the following fields:

Field Name	R/O/C	Description					
Personnel no.	R	The employee's unique identifying number Example: 40000593					
From.	R	This is the date that substitution beings. Example: 1/22/2007					
То	R	This is the date the substitution ends. Example: 1/31/2007					

- Click @ (Enter) to validate the information. 3.
- Substitutions Click the grey box to the left of 4. to select.
- 5. Enter the dates that need to be changed for the work schedule substitution under the Period tab.
- Click Month to view work schedule in a monthly calendar. 6.
 - i To view an employees work schedule in a calendar format, you can click Month to view work schedule in a monthly calendar, 10 Week to view the work schedule in a weekly calendar, and ^{Tear} to view to work schedule in a yearly calendar.

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Change Monthly Calendar

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🛗 Search term									
🛱 Free search	Monthly calend	ar /							
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	28 - 03	0FF	D001	D001	D001	D001	D001	OFF	
	04 - 10	0FF	D001	D001	D001	D001	D001	OFF	
	11 - 17	OFF	D001	D001	D001	D001	D001	OFF	
	18 - 21	OFF	D001	D001	D001				

7. As needed, make appropriate changes to the employee's schedule.

For example, the employee's normal scheduled day off is Saturday, however the employee has received approval to work on Saturday and take Friday off instead. This

change can be made by clicking into the fields that need change and using the Matchcode button) to open the selection list.

HRMS Training Documents

Change Monthly Calendar

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Collective search help	Start	01/22/200	7 То	02/21/2007				
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🛱 Free search	Monthly calend	ar /						
	FD LD	Sunday	Monday	Tuesday	Wednes	Thursday	Friday	Saturday
	22 - 27		D001	D001	D001	D001	0FF	D001
	28 - 03	0FF	D001	D001	D001	D001	0FF	D001
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	11 - 17	0FF	D001	D001	D001	D001	OFF 🕞	D001
	18 - 21	OFF	D001	D001	D001			

8. If all changes are made, click (Enter) to validate

(Enter) to validate the information.

9. Click 🖳 (Save) to save.

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Change Monthly Calendar

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Once you click save, a system message will display indicating that the record has been changed.

In this example, Friday has been changed to the employees scheduled day off, and Saturday has been changed to a regular work day. These changes are noted by the **"S**" (substitution) under the work schedule rule.

Work Schedule Substitution Using Substitution (2003)

10. You have started the transaction using the menu path or transaction code **PA61**.

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Maintain Time Data

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11. Complete the following fields:

Field Name	R/O/C	Description			
Personnel no.	R	The employee's unique identifying number			
		Example: 40000593			

- 12. Click 🥙 (Enter) to validate the information.
- **13.** Click the grey box to the left of Substitutions to select.
- **14.** Complete the following fields:

Field Name	R/O/C	Description					
From.	R	This is the date that substitution beings.					
		Example: 1/22/2007					
То	R	This is the date the substitution ends.					
		Example: 1/31/2007					

HRMS Training Documents

- **15.** Click **(Enter)** to validate the information.
- 16. Click (Copy) to copy and continue.

Create Substitutions (2003)

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17. Complete the following fields:

Field Name	R/O/C	Description			
Work schedule rule	R	Description of the Work schedule rule.			
		Example: RO17 4-10s T-F, 10hpd			

HRMS Training Documents



For an hourly employee, you will want to change the Daily Work Schedule under the Daily work schedule / tab.

For a monthly employee you will want to change the Work Schedule under the Work schedule rule / tab.

18. Click (Matchcode icon) to open the selection list.

File name:

HRMS Training Documents

Work Schedule Rule (1) 244 Entries Found

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1				P005	01/01/1990	12/31/9999	
1	5C 10	R007	5-8s: Th-M, 8 hpd	P007	01/01/1990	12/31/9999	
1	5C 10	R009	5-8s: F-T, 8 hpd	P009	01/01/1990	12/31/9999	
1	5C 10	R011	5-8s: St-W, 8 hpd	P011	01/01/1990	12/31/9999	
1	5C 10	R013	5-8s: Sn-Th, 8 hpd	P013	01/01/1990	12/31/9999	
1	5C 10	R015	4-10s: M-Th, 10 hpd	P015	01/01/1990	12/31/9999	
1	5C 10	R017	4-10s: T-F, 10 hpd	P017	01/01/1990	12/31/9999	
1	5C 10	R019	4-10s: W-St, 10 hpd	P019	01/01/1990	12/31/9999	
1	5C 10	R021	4-10s: Th-Sn, 10 hpd	P021	01/01/1990	12/31/9999	
1	5C 10	R023	4-10s: F-M, 10 hpd	P023	01/01/1990	12/31/9999	
1	5C 10	R025	4-10s: St-T, 10 hpd	P025	01/01/1990	12/31/9999	
1	5C 10	R027	4-10s: Sn-W, 10 hpd	P027	01/01/1990	12/31/9999	
1	5C 10	R030	24/7: M-Sn, 24 hpd	P029	01/01/1990	12/31/9999	
1	5C 10	R031	4-9s/4: M-Th 9, F 4	P031	01/01/1990	12/31/9999	
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1	5C 10	R035	4-9s/4: W-St 9, Sn 4	P035	01/01/1990	12/31/9999	
1	5C 10	R037	4-9s/4: Th-Sn 9, M 4	P037	01/01/1990	12/31/9999	
1	5C 10	R039	4-9s/4: F-M 9, T 4	P039	01/01/1990	12/31/9999	
1	5C 10	R041	4-9s/4: St-T 9, W 4	P041	01/01/1990	12/31/9999	
1	5C 10	R043	4-9s/4: Sn-W 9, Th 4	P043	01/01/1990	12/31/9999	
1	5C 10	R045	2Wk:M-Th 9, F 8, 2nd F 0	P045	01/01/1990	12/31/9999	
1	5C 10	R047	2Wk: M-Th 9, F 0, 2nd F 8	P047	01/01/1990	12/31/9999	
1	5C 10	R049	2Wk: M-F 9, 2nd Th 8, F 0	P049	01/01/1990	12/31/9999	
1	5C 10	R051	2Wk: M 8, T-F 9, 2nd M 0	P051	01/01/1990	12/31/9999	
1	5C 10	R053	2Wk: M 0, T-F 9, 2nd M 8	P053	01/01/1990	12/31/9999	
1	5C 10	R055	2Wk: M-Th 9,F8,2nd M 0,F9	P055	01/01/1990	12/31/9999	
1	5C 10	R057	2Wk:M 0,T-F 9,2nd M 9,F 8	P057	01/01/1990	12/31/9999	
1	5C 10	R059	2Wk: 1st M-W 9, Th 8, F 0	P059	01/01/1990	12/31/9999	
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21. Click **(Enter)** to validate the information.

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Copy Substitutions (2003)

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	Personnel number						
Save your entries	D RT0 (1)						

- 22. Click 📙 (Save) to save your entries.
- **23.** You have completed the substitution to an employee's normal work schedule rule.

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Comments

After the work schedule substitution is entered, any hours worked or leave taken can be entered using the Cross Application Time sheet (CAT2) for the updated schedule.

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