Overview

Trigger:

Agency payroll staff wants a report showing employees with an annual leave balance above 320 hours.

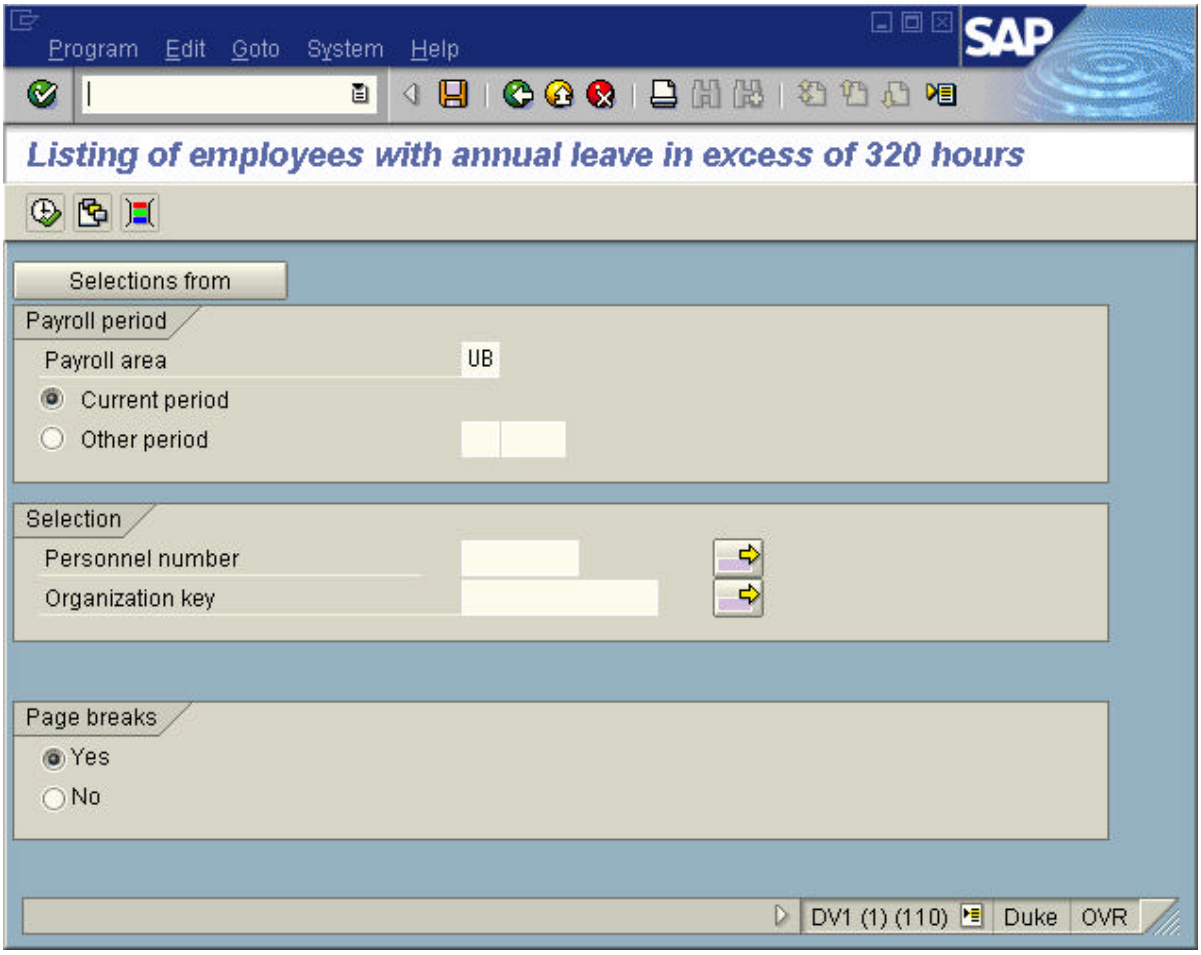
Business Process Procedure Overview
Annual leave hours above 320 at the end of pay period 26 are deleted. This report allows agencies to identify employees that may lose annual leave if it is not used before the end of pay period 26. This report should always be run on Wednesday, Thursday, or Friday during the week of payday. This ensures the "Hours to be accrued" column has the most accurate information. If this report is run during the week of time entry there is one extra pay period of accrual in the "Hours to be accrued" column.

Procedural Steps

1. Access transaction by:

Via Menu	Time Entry Operator > Reports - other > Annual Leave in excess of 320 hours
Via Transaction Code	Z_LEAVE_OVER_320
Via Favorites Menu	Annual Leave in excess of 320 hours

Double click on "Annual Leave in excess of 320 hours" and the following screen will appear:



Input – Available Fields	Field Value
Payroll area	UB
Payroll period	Current or Other depending on if payroll has processed
Personnel number	Employee Identification Number of the employee or employee's
Organization key	Agency, Low Org, and Distribution Code
Page breaks	Yes or No

1.2 Specify the payroll area. The screen defaults to the correct area, UB.

1.3 Specify the pay period. The screen has the selection of current period or other period.

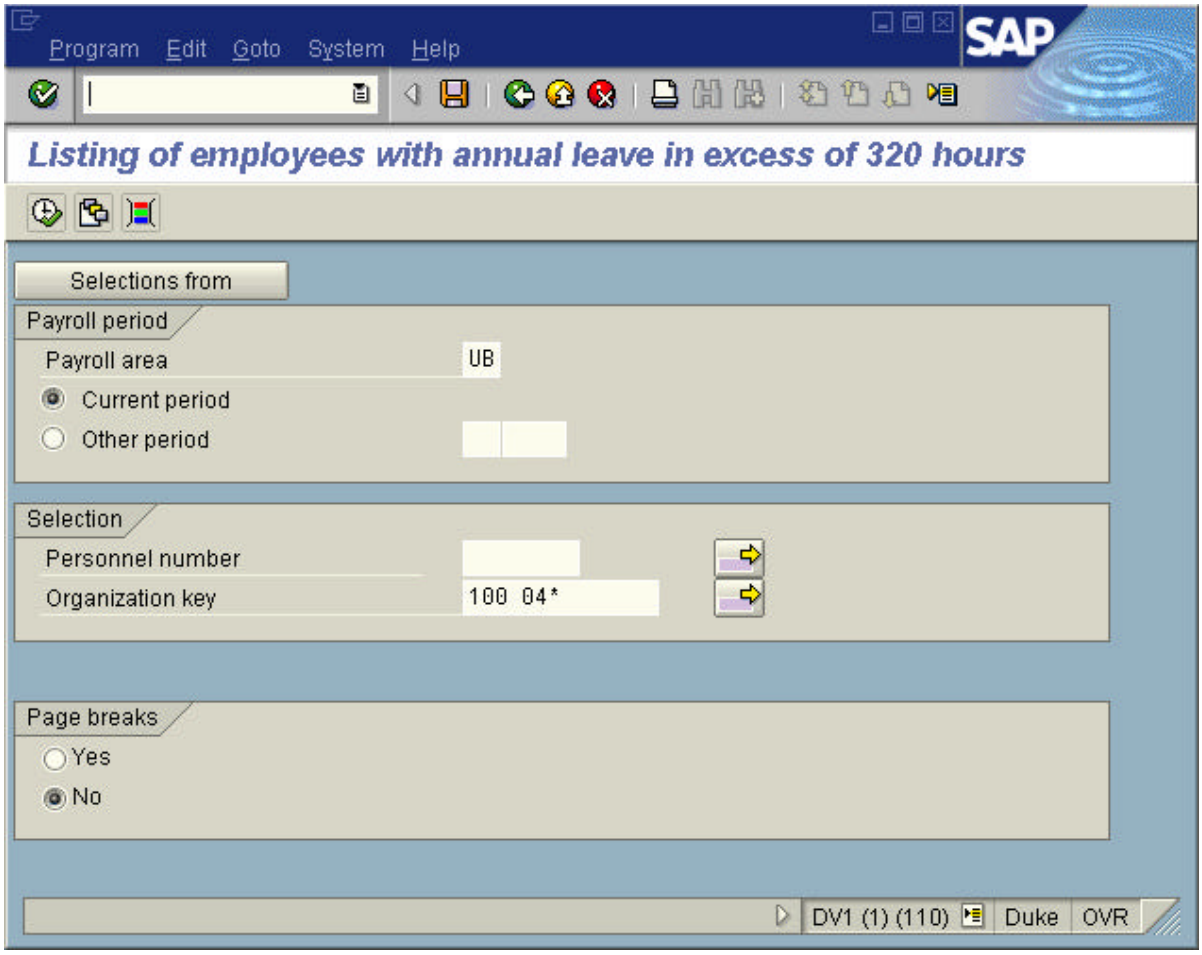
- Current period
  - Use this option during the week of payday.

- Other period
  - If this option is used during the week of time entry there is one extra pay period of accrual in the "Hours to be accrued" column. It is better to run the report during the week of payday. Type in the pay period and calendar year for which time is being entered.

This report should always be run on Wednesday, Thursday, or Friday during the week of payday using the current period. This ensures the "Hours to be accrued" column has the most accurate information.

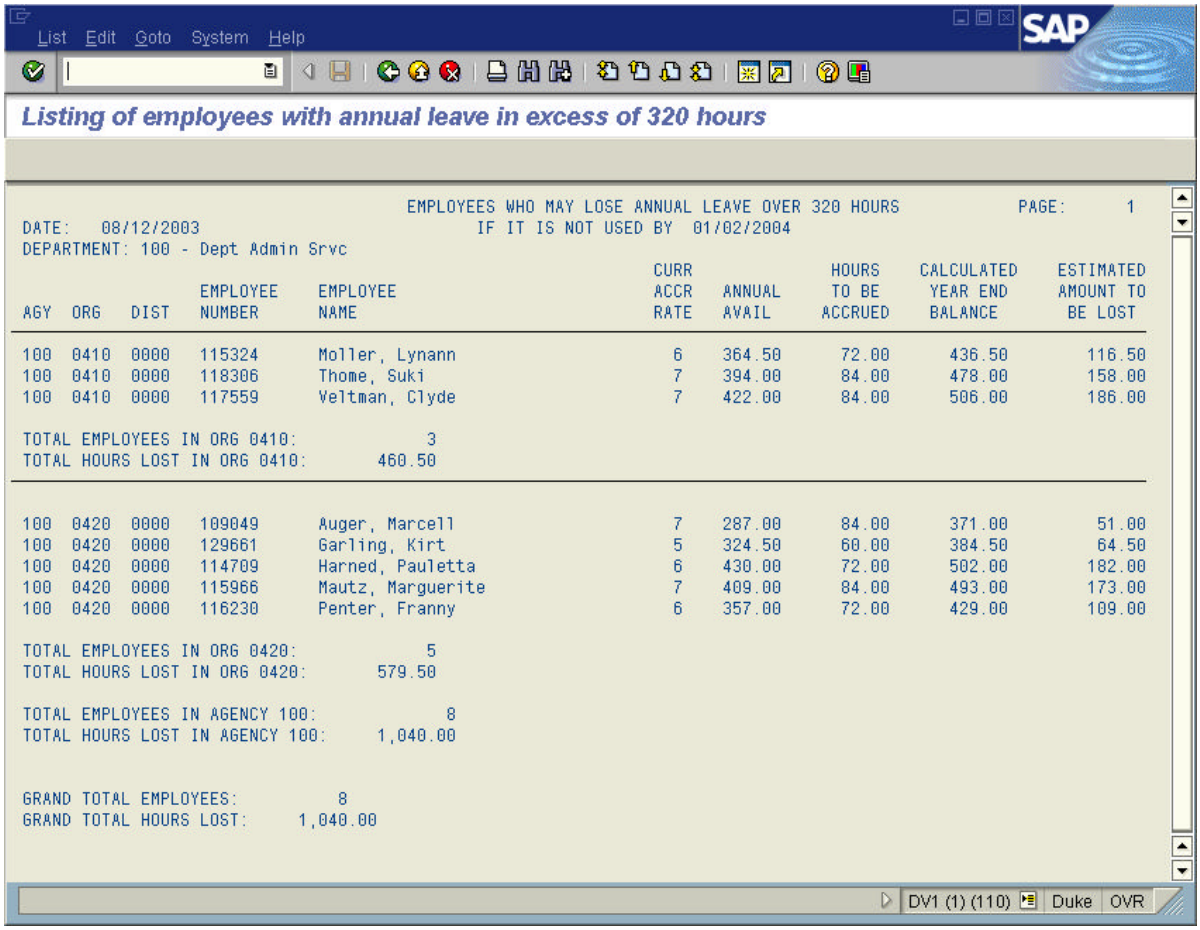
1.4 The "Personnel number" field may be left blank if using the agency "Organization key". Specific employees may be selected by entering the employee identification number(s) in the "Personnel number" field. Enter more than one EIN by clicking on the arrow box next to the "Personnel number" field. A box appears that allows entry of multiple EIN's.

1.5 The "Organization key" field allows entry of the Agency code followed by a blank space, the Organization code and the Distribution code to specify a selection of an employee group. Use the wild card symbol, *, in the selection criteria to get all employees within the same org. For example, to print the report for all employees in agency 100 and orgs with 04, enter 100(space)04*. Enter multiple organization keys by clicking on the arrow box to the right of the "Organization key" field. A box appears that allows entry of multiple individual organization keys or a range of organization keys. The example below shows entries for selecting employees in agency 100, orgs with 04, and any distribution code.



1.6 The "Page breaks" buttons create a page break after each org change or not create any page breaks. The default is Yes, create page breaks.

1.7 Click on the Execute button in the upper left area that looks like a clock to view the report. An example of the report is below.



EMPLOYEES WHO MAY LOSE ANNUAL LEAVE OVER 320 HOURS — PAGE: 1

DATE: 08/12/2003 — IF IT IS NOT USED BY 01/02/2004

DEPARTMENT: 100 - Dept Admin Srvc

AGY	ORG	DIST	EMPLOYEE NUMBER	EMPLOYEE NAME	CURR ACCR RATE	ANNUAL AVAIL	HOURS TO BE ACCRUED	CALCULATED YEAR END BALANCE	ESTIMATED AMOUNT TO BE LOST
100	0410	0000	115324	Moller, Lynann	6	364.50	72.00	436.50	116.50
100	0410	0000	118306	Thome, Suki	7	394.00	84.00	478.00	158.00
100	0410	0000	117559	Veltman, Clyde	7	422.00	84.00	506.00	186.00
TOTAL EMPLOYEES IN ORG 0410:			3						
TOTAL HOURS LOST IN ORG 0410:			460.50						
100	0420	0000	109049	Auger, Marcell	7	287.00	84.00	371.00	51.00
100	0420	0000	129661	Garling, Kirt	5	324.50	60.00	384.50	64.50
100	0420	0000	114709	Harned, Pauletta	6	430.00	72.00	502.00	182.00
100	0420	0000	115966	Mautz, Marguerite	7	409.00	84.00	493.00	173.00
100	0420	0000	116230	Penter, Franny	6	357.00	72.00	429.00	109.00
TOTAL EMPLOYEES IN ORG 0420:			5						
TOTAL HOURS LOST IN ORG 0420:			579.50						
TOTAL EMPLOYEES IN AGENCY 100:			8						
TOTAL HOURS LOST IN AGENCY 100:			1,040.00						
GRAND TOTAL EMPLOYEES:			8						
GRAND TOTAL HOURS LOST:			1,040.00						

1.8 To print the report, click on the print icon, or choose List > Print from the screen heading toolbar.

2 The report heading contains the following information:

- The report title
- Page number
- Date the report was run
- Department number and name

2.2 The columns on the report are listed below with a brief description.

Agy	The employee's agency code.
Org	The employee's low org.
Dist	The employee's distribution code.
Employee Number	The employee's identification number.
Employee Name	The employee's name.
Curr Accr Rate	The employee's current rate of accrual for annual leave.
Annual Avail	The available annual leave at the time the report was run.
Hours to be accrued	The projected amount of accrual based on the remaining pay periods in the calendar year.
Calculated year end balance	The estimated balance at calendar yearend if no annual leave is used.
Estimated amount to be lost	The amount of annual leave over 320 that will be lost if not used before the end of pay period 26.
Total employees in org	Sub total of employees in that org with annual hours over 320.
Total hours lost in org	Sub total of hours lost in that org.
Total employees in agency	Total number of employees in the agency with annual hours over 320.
Total hours lost in agency	Total hours lost for that agency.
Grand total of employees	Grand total number of employees with annual hours over 320.
Grand total hours lost	Grand total number of hours lost.