With Time Management you can generate time quotas based on specified rules and apply them to employees to be used in the system. In this reading sample you will learn about the types of time quotes in SAP ERP HCM’s Time Management, how time quotes are set up and generated, and how they can be used.
One important concept of Time Management is the capability of the system to generate time quotas or entitlements based on specified rules and allot them to the employees so they can be used later. This chapter explains the types of quotas, how they can be set up, and how they can be generated and used.

3 Time Quotas

As part of employment remuneration packages, most companies give their employees time off entitlements such as vacation days, sick days, floater days, and so on. These can be paid or unpaid entitlements depending on company policy. In SAP ERP HCM, these are known as absence quotas. Companies may also choose to give their employees preapproved attendance entitlements such as overtime, training hours, and so on. These are known as attendance quotas.

This chapter discusses how to configure absence and attendance quotas in Time Management, how to generate them based on certain defined rules, and how employees can use them. Figure 3.1 illustrates the elements of creating, generating, and using time quotas.

Before time quotas can be generated and used, they have to be configured in the system according to the rules defined by policies of the company. Configuration of time quotas involves setting up several different configuration elements such as the groupings for personnel area/subarea and employee group/subgroup in context of the time quotas, setting up the absence and attendance quota types, and setting up the generation and counting rules for quotas based on rules defined. Section 3.1 explains these configurations further.

After the time quotas and the relevant generation rules are configured, the quotas need to be generated before they can be used by the employees. Generating time quotas can be done in three different ways: by using time evaluation, by using a quota generation report, or by manual entry. Section 3.2 explains this in detail.
3.1 Configuring Time Quotas

Several elements are involved in time quota configuration:

- Setting up groupings for time quotas
- Creating time quota types
- Setting up an accrual method for absence quotas
- Setting rules for generating absence quotas
- Defining counting rules and deduction rules
- Assigning counting rules to absence types

Each of these elements is explained in detail in the following sections.

3.1.1 Setting Up Groupings for Time Quotas

We've previously discussed the concept of personnel subarea groupings for work schedules in Chapter 1, Section 1.1.1, and employee subgroup groupings in Chapter 1, Section 1.2.3. Similarly, there are groupings you can use to classify quotas into groups for personnel areas/subareas and employee groups/subgroups that have the same rules. In the context of time quotas, these groupings are called personnel subarea groupings for time quotas and employee subgroup groupings for time quotas, respectively.

Personnel Area/Subarea Grouping for Time Quotas

Certain personnel areas and subareas can be grouped into one grouping for quotas if, say, certain quota types are applicable to them. For example, as illustrated in Figure 3.2, PERSONNEL SUBAREAS 0001 and 0002 can be grouped together in time quota grouping 01 and PERSONNEL SUBAREAS 0003 and 0004 can be grouped in time quota grouping 02. The groupings 01 and 02 can have different eligibilities and meanings for time quotas.

You can configure personnel area/subarea groupings for time quotas using the following menu path or configuration table.
Figure 3.3 shows how you can configure the personnel area/subarea groupings for time quotas.

**Employee Group/Subgroup Grouping for Time Quotas**

Similar to the personnel area/subarea grouping for time quotas, certain employee groups and subgroups can be grouped into one grouping for quotas if certain quota types and specific quota generation rules are applicable to those employee groups and subgroups.

**Example: Employee Group/Subgroup Groupings for Time Quotas**

As illustrated in Figure 3.4, salaried full-time employees can be grouped into time quota grouping 1, and hourly part-time employees can be grouped in time quota grouping 2. Groupings 1 and 2 can have different eligibilities and meaning for time quotas.

You can configure employee group/subgroup groupings for time quotas using the following menu path or configuration table.

**3.1.2 Creating Time Quota Types**

You can define time quotas for absences such as vacation or sick days or for attendances such as preapproved overtime, training hours, and so on.

The time quota types are linked to the respective absence types and attendance types. For example, if the absence quota for vacation is set up for an employee, then the actual absence type for vacation is linked to the absence quota type vacation so that whenever the absence is entered as “vacation”, the quota for vacation gets deducted by that many hours or days. The balance of the quota remains in the absence quota for use later. The absence quotas are linked to the absence types through counting rules, which will be discussed in Section 3.1.5.
There is always a validity period for the absence quotas in the system during which the quota remains valid. However, there is also what is known as a deduction period, which you can define in the system to control when the quota can be deducted.

**Example: Quota Deduction Period**

The validity interval may be defined as one calendar year from January 1st, 2015, to January 31st, 2015; however, if the company allows the employee to use his vacation quota three months following the end of the calendar year, then the deduction period can be defined as January 1st, 2015, to March 31st, 2016.

**Absence Quotas**

You can configure absence quota types using the following menu path or configuration table.

---

**Quick Reference**

**Menu path:** Time Management • Time Data Recording and Administration • Managing Time Accounts Using Attendance/Absence Quotas • Time Quota Types • Define Absence Quota Types

**Table/view:** V_T556A

---

Figure 3.6 shows how you can configure the absence quota type.

The following explains the usage of each field in the configuration table.

You can maintain the following fields in the main section of the screen:

- **ESG Time quota types**
  Employee subgroup grouping for time quotas is used to classify the types of employees (refer to Section 3.1.1).

- **PS Grpg Tm Quota Typ**
  Personnel subgroup grouping for time quotas is used to group personnel area and subarea with common rules with respect to the time quotas (refer to Section 3.1.1).

- **Absence quota type**
  Name and description of the absence quota type.

You can maintain the following fields in the **PERIODS** section of the screen:

- **Start**
  Validity start date.

- **End**
  Validity end date.

You can maintain the following fields in the **ABSENCE QUOTA TYPE** section of the screen:

- **Recording**
  - **Time/Measurement unit**
    Specifies the unit of measurement for calculating the quota.
  - **Time constraint class**
    Used to check collisions between the infotypes in Time Management. (Chapter 4 discusses this further.)
  - **Transfer rem. entitlement**
    Transfer remaining entitlement is only used if you want to transfer entitlement from Infotype IT0005 (Leave Entitlement). However, in the new versions of SAP ERP HCM, in most cases, Infotype IT0005 isn’t used for entitlements.
3.1 Time Quotas

### Attendance Quotas

You can configure attendance quota types using the following menu path or configuration table.

**Quick Reference**

**Menu path:** Time Management • Time Data Recording and Administration • Managing Time Accounts Using Attendance/Absence Quotas • Time Quota Types • Define Attendance Quota Types

**Table/view:** V_T556P

Figure 3.7 shows how you can configure the attendance quota type.

![Change View "Attendance Quota Type" : Details](change_view.png)

The following explains the usage of each field in the configuration table.

You can maintain the following fields in the main section of the screen:

- **ESG Time quota types**
  Employee subgroup grouping for time quotas is used to classify the types of employees for time quotas (refer to Section 3.1.1).
Personnel subgroup grouping for time quotas is used to group personnel and subareas with common rules with respect to the time quotas (refer to Section 3.1.1).

**ATT. QUOTA TYPE**

Name and description of the attendance quota type.

You can maintain the following fields in the PERIODS section of the screen:

- **START**
  - Validity start date.
- **END**
  - Validity end date.

You can maintain the following fields in the ATTENDANCE QUOTA TYPE section of the screen:

- **TIME/METRIC UNIT**
  - Specifies the unit of measurement to be used for calculating the quota.
- **TIME CONSTRAINT CLASS**
  - Used to check collisions between the infotypes in Time Management. (Chapter 4 discusses this further.)
- **TIMES**
  - **START TIME**
    - If the unit of measurement for the quota is specified as HOURS, then you can specify the default start time here.
  - **END TIME**
    - If the unit of measurement for the quota is specified as HOURS, then you can specify the default end time here.

**DEDUCTION**

- **DEDUCTION THROUGH TIME EVALUATION**
  - This flag specifies whether, upon entry of the relevant attendances, the attendance quota should be deducted through time evaluation.
- **DEDUCTION THROUGH ATTENDANCES**
  - This flag specifies whether the attendance quota should be deducted directly upon entry of the relevant attendances in Infotype IT2002 (Attendances).

If the company allows for quota deduction to go beyond the available entitlement, you can specify the number of hours or days in this field by which the entitlement can go over.

### 3.1.3 Setting Up the Accrual Method for Absence Quotas

In this step of time quota configuration, you define which of the three methods you want to use to generate the absence quotas:

- Through time evaluation
- Via standard SAP Report RPTQTA00
- By manual entry into Infotype IT2006 (Absence Quotas)

Section 3.2 of this chapter discusses the actual generation of absence quotas using these three methods in detail. In this section, however, you need to define which method to use for this task.

You can determine which accrual method you want to use, using the following menu path or configuration table.

#### Quick Reference

**Menu path:**
- Time Management • Time Data Recording and Administration • Managing Time Accounts Using Attendance/Absence Quotas • Calculating Absence Entitlements • Automatic Accrual of Absence Quotas • Permit Generation of Time Quotas in Time Evaluation

**Table/view:** Y_556A_B

Figure 3.8 shows how you can configure the accrual method for absence quotas.
The following explains the usage of each field in the configuration table:

- **ES GR**
  Employee subgroup grouping for time quotas is used to classify the types of employees for time quotas (refer to Section 3.1.1).

- **PSGPG**
  Personnel subgroup grouping for time quotas is used to group personnel areas and subareas with common rules with respect to the time quotas (refer to Section 3.1.1).

- **AQTyp**
  Name of the absence quota type.

- **Quota Text**
  Description of the absence quota type.

- **Start Date**
  Validity start date.

- **End Date**
  Validity end date.

- **Unit**
  Specifies the unit of measurement to be used for calculating the quota.

- **No generat.**
  The no generation of quota radio button specifies that you don’t want to generate the absence quotas using time evaluation. The absence quotas must be entered manually in Infotype IT2006 (Absence Quotas) in this case.

- **Increase**
  The increase quota radio button specifies that you want to generate the absence quotas using time evaluation. The value of the quota calculated in time evaluation should be added to the value that is already in the quota in Infotype IT2006.

- **Replace**
  The replace the quota radio button specifies that you want to generate the absence quotas using time evaluation. The value of the quota calculated in time evaluation should replace the value that is already in the quota in Infotype IT2006.

- **NegDed** (negative deduction up to)
  If the company allows for quota deduction to go beyond the available entitlement, you can specify the number of hours or days in this field by which the entitlement can go over.

- **TCC (time constraint class)**
  This is used to check collisions between the infotypes in Time Management. (This will be discussed further in Chapter 4).

### 3.1.4 Setting Rules for Generating Absence Quotas

Rules come into play when you want the system to generate the absence quotas automatically, either through time evaluation or using Report RPTQTA00. Several elements determine how the absence quotas should be generated. As illustrated in Figure 3.9, following are the elements that make up the rules for generating the absence quotas:

- **Validity and deduction intervals**
- **Reduction rules**
- **Rounding rules**
- **Selection rules**
  - **Applicability**
  - **Accrual period**
  - **Base entitlement**
  - **Accrual entitlement**

![Figure 3.9 Elements of Rules for Generating Absence Quotas](image)

This section discusses the details of each of these elements.
Validity and Deduction Intervals

When generating the absence quota, one important thing to define is how the system should determine the from and to dates of the validity period, as well as the deduction period. You can configure validity and deduction intervals using the following menu path or configuration table.

Quick Reference

Menu path: Time Management • Time Data Recording and Administration • Managing Time Accounts Using Attendance/Absence Quotas • Calculating Absence Entitlements • Rules for Generating Absence Quotas • Determine Validity and Deduction Periods

Table/view: V_T559D

Figure 3.10 shows how you can configure the validity and deduction periods for absence quotas.

The following explains the usage of each field in the configuration table.

You can maintain the following in the main section of the screen:

- **ESG Time quota types**
  - Employee subgroup grouping for time quotas is used to classify the types of employees for time quotas (refer to Section 3.1.1).

- **PS Grpg Tm Quota Typ**
  - Personnel subgroup grouping for time quotas is used to group personnel areas and subareas with common rules with respect to the time quotas (refer to Section 3.1.1).

- **Absence quota type**
  - Name and description of the absence quota type.

You can maintain the following in the **Validity interval** section of the screen:

- **Valid from/Valid to**
  - Calendar year: Validity interval is defined as a calendar year from January 1st to December 31st.
  - Time evaluation period: Validity interval is defined as whatever is taken as the time evaluation period.
  - Payroll period: Validity interval is defined as the payroll period according to the payroll area.
  - Accrual period: Validity interval is defined as the accrual period according to the definition in the selection rule, which is explained later in this section.
  - Base period: Validity interval is defined as the base period according to the definition in the selection rule, which is explained later in this section.
  - Transfer time: Validity interval is defined as the transfer time period according to the definition in the selection rule, which is explained later in this section.
You can configure reduction rules using the following menu path or configuration table.

Quick Reference

**Menu path:**
- Time Management • Time Data Recording and Administration • Managing Time Accounts Using Attendance/Absence Quotas • Calculating Absence Entitlements • Rules for Generating Absence Quotas • Define Rules for Reducing Quota Entitlements • Define Reduction Rule

**Table/View:** T559M

Figure 3.11 shows how you can configure the reduction rules for absence quotas.

Figure 3.11  Reduction Rule: Configuration

The following explains the usage of each field in the configuration table.

---

**Reduction Rules**

When defining the reduction rules, you determine how the absence quotas should be reduced upon generation.
You can maintain the following field in the main section of the screen:

- **Reduction Rule**
  Name and description of the reduction rule that defines how the quota should be reduced.

You can maintain the following in the Reduction Rule for Part-time Employees section of the screen:

- **Basic Data**
  - **No Reduction**
    No reduction should be applied.
  - **Employment Pct. from Planned Working Time Infotype**
    Reduction should be according to the employment percentage specified in Infotype IT0007 (Planned Working Time).
  - **Capacity Util. Level from Basic Pay Infotype**
    Reduction should be according to the capacity utilization level specified in Infotype IT0008 (Basic Pay).
  - **Weekly Workdays**
    Reduction is based on the weekly working hours specified in Infotype IT0007 (Planned Working Time), which is taken as a ratio between weekly workdays specified here and the Days value specified in table V_T510I (Standard Working Hours). The configuration table is shown in Figure 3.12.

Figure 3.12 Standard Working Hours: Configuration

- **Key Date for Determining Part-time Data**
  Any of the previously mentioned criteria for determining the reduction takes into account the key date defined here:
  - **Day by Day in Accrual Period**
    Reduction is done day by day in the accrual period.
  - **Start of Accrual Period**
    Reduction applies only at the start date of the accrual period. For example, employment percentage decreases from 100% to 50%, but this change is taken into consideration for quota reduction only at the start of the next accrual period.
  - **End of Accrual Period**
    Reduction applies only at the end date of the accrual period.
  - **Day by Day in Base Period**
    Reduction is done day by day in the base period.
  - **Start of Base Period**
    Reduction applies only at the start date of the base period.
  - **End of Base Period**
    Reduction applies only at the end date of the base period.

You can maintain the following in the Reduction Rule for Inactive Days section of the screen:

- **Reference Period**
  - **Accrual Period**
    Reference period used to determine the number of inactive days in the accrual period.
  - **Base Period**
    Reference period used to determine the number of inactive days in the base period.

- **Pct. of Inactive Calendar Days**
  Percentage of inactive days in the reference period used to calculate reduction per the following indicators.

  - **To Percentage**
    - **No Reduction**
      If the number of inactive days in the reference period doesn’t exceed the percentage specified in the preceding field, then no reduction in quota is applied.
    - **Proportionate Reduction**
      If the number of inactive days in the reference period doesn’t exceed the percentage specified in the preceding field, then proportionate or prorated reduction in quota is applied.
**Time Quotas**

- **Complete Reduction**
  If the number of inactive days in the reference period doesn’t exceed the percentage specified in the preceding field, then complete reduction in quota is applied.

- **From Percentage**
  - **No Reduction**
    If the number of inactive days in the reference period exceeds the percentage specified in the preceding field, then no reduction in quota is applied.
  - **Proportionate Reduction**
    If the number of inactive days in the reference period exceeds the percentage specified in the preceding field, then proportionate or prorated reduction in quota is applied.
  - **Complete Reduction**
    If the number of inactive days in the reference period doesn’t exceed the percentage specified in the preceding field, then complete reduction in quota is applied.

---

**Example: Percentage of Inactive Calendar Days**

You can set the Reference period as Accrual period. Enter "20" in the Pct. of inactive calendar days field, and specify No reduction under To percentage and Proportionate reduction under From percentage. In this example, as long as the number of inactive days doesn’t exceed 20% during the accrual period, there is no reduction in the quota; after 20%, the quota gets reduced proportionately.

Another configuration element that goes hand in hand with the preceding reduction rules configuration is to specify which absences should be counted toward inactive days. You can configure this using the following menu path or configuration table.

---

**Quick Reference**

**Menu path:** Time Management • Time Data Recording and Administration • Managing Time Accounts Using Attendance/Absence Quotas • Calculating Absence Entitlements • Rules for Generating Absence Quotas • Define Rules for Reducing Quota Entitlements • Assign Reduction Indicators for Absences

**Table/view:** V_554S_M

---

**Figure 3.13** Assigning Reduction Indicators to Absences: Configuration

### Change View "Reduction indicators for absences": Overview

<table>
<thead>
<tr>
<th>PS5</th>
<th>A/A Type</th>
<th>A/A type text</th>
<th>Start Date</th>
<th>End Date</th>
<th>Min. days</th>
<th>Max. days</th>
<th>Reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01</td>
<td>Paid Absence</td>
<td>01/01/1990 12/31/1999</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/01</td>
<td>Paid Absence</td>
<td>01/01/1990 12/31/1999</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/01</td>
<td>Unpaid Absence</td>
<td>01/01/1990 12/31/1999</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 3.13** Assigning Reduction Indicators to Absences: Configuration

The following explains the usage of the relevant fields in the configuration table:

- **Min. days**
  Number of days after which the reduction is considered.

- **Max. days**
  Number of days up to which the reduction is considered.

- **Reduction**
  Indicator to specify if the reduction should apply to this absence type at all.

---

**Rounding Rules**

When generating the absence quotas automatically, the calculated quota numbers can result in decimals, such as 10.34 hours. In such cases, you can apply certain rounding rules to either round up or round down the calculated numbers.

You can configure rounding rules using the following menu path or configuration table.

---

**Quick Reference**

**Menu path:** Time Management • Time Data Recording and Administration • Managing Time Accounts Using Attendance/Absence Quotas • Calculating Absence Entitlements • Rules for Generating Absence Quotas • Define Rules for Reducing Quota Entitlements • Assign Reduction Indicators for Absences

**Table/view:** V_T559R

**Figure 3.14** Assigning Reduction Indicators to Absences: Configuration

---

**Figure 3.14** Configuring the rounding rules.
The following explains the usage of each field in the configuration table:

- **RORUL**
  Name of the rounding rule that defines how the quota should be rounded.

- **NAME**
  Rounding rule description.

- **NO.**
  Sequential number of the rounding rule.

- **LOWER LIMIT**
  Lower limit of the interval used for rounding.

- **INCL. (inclusive interval limit)**
  Specifies if the lower limit should be included in the interval.

- **UPPER LIMIT**
  Upper limit of the interval used for rounding.

- **INCL. (inclusive interval limit)**
  Specifies if the upper limit should be included in the interval.

- **TARGET VALUE**
  Specifies the resulting value after rounding.

- **ROLL.**
  Specifies if the rounding interval should be considered as a repeating or rolling interval.

### Example: Rounding Rule

If the **LOWER LIMIT** is defined as 0.50000 inclusive, the **UPPER LIMIT** as 1.50000 not inclusive, and the **TARGET VALUE** as 1.00000 with a **ROLL.** indicator, the final result for the values will be as follows:

- Original value 1.49000 = Target value 1.00000
- Original value 1.50000 = Target value 2.00000
- Original value 9.49000 = Target value 9.00000

### Selection Rules

Besides some basic elements described previously, several other factors determine how the absence quotas should be generated:

- **Applicability**
- **Accrual period**
- **Base entitlement**
- **Accrual entitlement**

You can configure selection rules using the following menu path or configuration table.

#### Quick Reference

**Menu path:**
- **TIME MANAGEMENT**
  - **TIME DATA RECORDING AND ADMINISTRATION**
  - **MANAGING TIME ACCOUNTS USING ATTENDANCE/ABSENCE QUOTAS**
  - **CALCULATING ABSENCE ENTITLEMENTS**
  - **RULES FOR Generating ABSENCE QUOTAS**
  - **DEFINE Generation RULES FOR QUOTA TYPE SELECTION**

**Table/view:** V_T559L

Several steps are involved in configuring the selection rules, as shown in Figure 3.15 to Figure 3.21.

Figure 3.15 shows the header record of the selection rule configuration.

- **ESG FOR TIME QUOTAS**
  Employee subgroup grouping for time quotas is used to classify the types of employees for time quotas (refer to Section 3.1.1).
- **PSG for time quotas**
  Personnel subgroup grouping for time quotas is used to group personnel areas and subareas with common rules with respect to the time quotas (refer to Section 3.1.1).

- **PSG for time rec.**
  Personnel subgroup grouping for time recording is used to group personnel areas and subareas with common rules with respect to the time recording.

- **Quota type sel. grp**
  This is used to group certain quota types into one group that may have common rules for processing and is queried in time evaluation. See Chapter 7 for further explanation and usage.

- **Selection rule**
  Name and text description of the selection rule.

- **Absence quota type**
  Absence quota type that this selection rule applies to and accompanying description.

- **Start**
  Validity start date.

- **End**
  Validity end date.

**Tips and Tricks**
You can use Feature QUOMO to set the quota type selection rule group. This feature is discussed in detail in Chapter 7, Section 7.2.1.

**Applicability**
The Applicability tab in the selection rule configuration defines the conditions in which this selection rule is applicable. Figure 3.16 shows the configuration of the Applicability tab of the selection rule.

The following explains the usage of each field in the Applicability tab:

- **Earliest accrual**
  Specifies the task type (Infotype IT0019, Monitoring of Tasks) to define the earliest date for accrual.

- **Entry date**
  Specify a data range for the entry date. The selection rule is applicable if the employee’s entry date is within this range.

**Accrual Period**
The Accrual Period tab in the selection rule configuration defines the accrual period during which the absence quota should be accrued. The decision of which accrual period to use is primarily driven by how often you want to transfer the entitlement to the employee’s absence quotas for the employee to be able to use it. For example, if the entitlement is accrued on a daily basis and transferred as it’s accrued, the entitlement is incremented in Infotype IT2006 on a daily basis. Figure 3.17 shows the configuration of the Accrual Period tab of the selection rule.

The following explains the usage of each field in the configuration table:

- **Daily**
  Quota entitlements are calculated on a daily basis.

- **Month**
  Quota entitlements are calculated on a monthly basis.

- **Calendar year**
  Quota entitlements are calculated on a basis of the full calendar year.
Time Quotas

- **Time evaluation period**
  Quota entitlements are calculated on a basis of the time evaluation period.

- **Payroll period**
  Quota entitlements are calculated based on the payroll period specified in the payroll area in Infotype IT0001 (Organizational Assignment).

- **Other period**
  Quota entitlements are calculated based on the period parameter specified here.

- **Rel. to date type**
  Quota entitlements are calculated based on the date type in Infotype IT0041 (Date Specifications) here.

- **Length**
  Length of time to be either added or subtracted from the date type date specified in the Rel. to date type field.

- **Take Account of Change of Work Center/Basic Pay**
  Specifies whether any changes to the employee's organizational assignment or pay structure is taken into account during quota accrual.

There are two steps to configure the base entitlements:

- Configure the base entitlement rule
- Assign the base entitlement to the selection rule

You can configure base entitlements using the following menu path or configuration table.

**Quick Reference**

**Menu path:**
- Time Management » Time Data Recording and Administration » Managing Time Accounts Using Attendance/Absence Quotas » Calculating Absence Entitlements » Rules for Generating Absence Quotas » Set Base Entitlements

**Table/view:** V_T559E

Figure 3.18 shows the configuration of the base entitlement rule.

---

**Configuring Time Quotas 3.1**

There are two steps to configure the base entitlements:

- Configure the base entitlement rule
- Assign the base entitlement to the selection rule

You can configure base entitlements using the following menu path or configuration table.

**Quick Reference**

**Menu path:**
- Time Management » Time Data Recording and Administration » Managing Time Accounts Using Attendance/Absence Quotas » Calculating Absence Entitlements » Rules for Generating Absence Quotas » Set Base Entitlements

**Table/view:** V_T559E

Figure 3.18 shows the configuration of the base entitlement rule.

---

**Base Entitlement**

Base entitlement is the basic entitlement of vacation for which the employee is eligible. This can be based on years of service, age, and so on. For example, a company may give 10 days of vacation entitlement per year for 1 to 3 years of service and 15 days of vacation entitlement per year for 3 to 5 years of service; thereafter, the employee gets 20 days of vacation. This can be set up as a base entitlement.
The following explains the usage of each field in the configuration table.

You can maintain the following in the main section of the screen:

- **ESG GRPG FOR TIME QUOTAS**
  Employee subgroup grouping for time quotas is used to classify the types of employees for time quotas (refer to Section 3.1.1).

- **PS GRPG FOR TIME QUOTAS**
  Personnel subgroup grouping for time quotas is used to classify the types of employees for time quotas (refer to Section 3.1.1).

- **PS GRPG FOR TIME RECORDING**
  Personnel subgroup grouping for time recording is used to group personnel areas and subareas with common rules with respect to the time recording.

- **ABSENCE QUOTA TYPE**
  Absence quota type that this selection rule applies to along with its description.

- **RULE FOR BASE ENTITLEMENT**
  Specify the rule for base entitlement.

- **SEQUENTIAL NO.**
  Sequential number of the rule.

You can maintain the following in the **PERIODS** section of the screen:

- **START**
  Validity start date.

- **END**
  Validity end date.

You can maintain the following in the **BASE ENTITLEMENT** section of the screen:

- **SENIORITY**
  Specify the range to define seniority for base entitlement.

- **AGE**
  Specify the range to define the age in a sequential number for the rule.

- **ENTITLEMENT**
  - **CONSTANT**
    Specify a constant number for base entitlement.

- **DAY BALANCE**
  Specify the time type to be used to get the day balance to calculate the base entitlement.

- **PERIOD BALANCE**
  Specify the time type to be used to get the period balance to calculate the base entitlement.

- **RELATED TO PERIOD**
  - **CALENDAR YEAR**
    Base entitlements are calculated on a basis of the full calendar year.
  
  - **ACCUM PERIOD**
    This is the time interval on which the calculation of the quota entitlement is based.
  
  - **TIME EVALUATION PERIOD**
    Base entitlements are calculated on a basis of the time evaluation period.
  
  - **PAYROLL PERIOD**
    Base entitlements are calculated based on the payroll period specified in the payroll area in Infotype IT0001 (Organizational Assignment).

  - **OTHER PERIOD**
    Base entitlements are calculated based on the period parameter specified here.

  - **REL. TO DATE TYPE**
    Base entitlements are calculated based on the date type in Infotype IT0041 (Date Specifications) here.
      - **LENGTH**
        Length of time to be either added or subtracted from the date type date specified in the **REL. TO DATE TYPE** field.

To assign the base entitlements to the selection rules, follow the same configuration menu path for selection rules as discussed earlier in this section. Figure 3.19 shows how to assign the base entitlement rule to the selection rule.

The following explains the usage of each field in the configuration table.

You can maintain the following in the main section of the screen:

- **RULE FOR BASE ENTITLEMENT**
  Specify the rule for base entitlement.
Time Quotas

**Base Entitlement**

Refer to field explanations following Figure 3.18 for further details.

![Figure 3.19 Assigning the Base Entitlement Rule to the Selection Rule: Configuration](image)

You can maintain the following in the Calculation of Seniority section of the screen:

- **Calculation Process**
  
  This is defined as standard in SAP and may be used to calculate the employment period.

You can maintain the following in the Key Date for Determining Seniority/Key Date for Determining Age sections of the screen. These definitions are used to determine the seniority or age of the employee. Length of seniority/age is calculated as the difference between the hire date of the employee and the key date of the current year as defined in one of these selections.

- **For Exact Day**
  
  Seniority/age is calculated as the difference between the hire date and the current date of calculation.

- **Start/End of Accrual Period**
  
  Seniority/age is calculated as the difference between the hire date and the start or end of the accrual period of the current year.

![Figure 3.20 Selection Rules-Accrual Entitlement-Configuration](image)

The following explains the usage of each field in the configuration table.

You can maintain the following in the Calculated pro rata according to accrual period section of the screen:

- **Pro rata calculation**
  
  In comparison to the base period, select this option if quota calculation should be prorated for the accrual period. For example, if the base period is the calendar year, and the base entitlement is 24 days of vacation, the accrual period is defined as Month, and then the prorated number of days in the accrual period is two days.
- **No pro rata calculation**
  No proration is applied.

You can maintain the following in the **Multiplication with time balance** section of the screen:

- **No multiplication**
  Quota calculation isn’t subject to any multiplication factor.

- **Day balance**
  Sometimes, specific customer requirements to reduce or increase quota entitlement according to specific rules can’t be met using standard reduction rules configuration. In such cases, multiplication factor using day balance can be used. The day balances time type can be determined in time evaluation and used here as a multiplication factor.

- **Period balance**
  Similarly, a period balance time type from time evaluation can be used as a multiplication factor.

You can maintain the following in the **Reduction, rounding, max. entitlement** section of the screen:

- **Reduction rule**
  Name of the reduction rule used to reduce the entitlement (refer to Figure 3.11).

- **Rounding rule**
  Name of the rounding rule used to reduce the entitlement (refer to Figure 3.14).

- **Max. entitlement**
  Defines the maximum entitlement that can be generated for the quota.

- **Reduction quota**
  An absence quota can be specified here to which the difference between the base entitlement and the reduced entitlement can be transferred.

- **Maximum exceeded**
  An absence quota can be specified here to which the excess amount of the entitlement can be transferred. This may be used later for compensation purposes.

**Transfer Time**

The **Transfer time** tab defines, after the quota is calculated, when the quota entitlement should be transferred to Infotype IT2006 (Absence Quota). Figure 3.21 shows how you can configure the **Transfer time** tab of the selection rule.

The following explains the usage of each field in the configuration table:

- **Upon accrual**
  Quota entitlement is transferred upon accrual.

- **Per calendar year**
  Quota entitlement is transferred per calendar year.

- **Per time evaluation period**
  Quota entitlement is transferred as per the time evaluation period specified.

- **Per payroll period**
  Quota entitlement is transferred per payroll period.

- **Other period**
  Quota entitlement is transferred according to the period parameter selected here.

- **Date type**
  Quota entitlement is transferred per the date type from Infotype IT0041 (Date Specifications).

- **Transfer rule**
  Quota entitlement is transferred according to the transfer rule selected.

- **Transfer packages**
  Quota entitlement is transferred upon reaching the period defined in any of the preceding selections; however, if a certain number of days is specified in this field, the transfer of entitlement takes place up to this value. If the generation exceeds this value, the excess is cumulated for the next transfer.
**Total Entitlement**

The **Total entitl.** tab defines the maximum quota entitlement that can be transferred to Infotype IT2006 (Absence Quota). Figure 3.22 shows how you can configure the **Total entitl.** tab of the selection rule.

![Figure 3.22 Selection Rules Total Entitlement: Configuration](image)

Figure 3.22 Selection Rules Total Entitlement: Configuration

The following explains the usage of each field in the configuration table:

- **Rounding rule**
  - Used to round the maximum entitlement (refer to Figure 3.14).

- **Max. entitl.**
  - Maximum quota entitlement that can be transferred to Infotype IT2006 (Absence Quotas).

### 3.1.5 Defining Counting Rules and Deduction Rules

In this section you will learn to specify certain rules which determine how the days and hours of an attendance or an absence should be counted, and how quotas should be deducted.

**Counting Rules**

As the name suggests, a **counting rule** is used to define how the absence or attendance is to be counted to determine the days or hours relevant for payroll purposes. You can define certain rules, such as applicability for a certain weekday, public holiday, planned working hours, and so on. You can configure counting rules using the following menu path or configuration table.

**Quick Reference**

**Menu path:** Time Management • Time Data Recording and Administration • Absences • Absence Catalog • Absence Counting • Rules for Absence Counting (New) • Define Counting Rules • Counting rule

**Table/view:** T556C

Figure 3.23 shows how you can configure counting rules.

![Figure 3.23 Counting Rules: Configuration](image)
The following explains the usage of each field in the configuration table.

You can maintain the following in the main section of the screen:

- **ESG Time quota types**
  Employee subgroup grouping for time quotas is used to classify the types of employees for time quotas (refer to Section 3.1.1).

- **PS GrpG Tm Quota Typ**
  Personnel subgroup grouping for time quotas is used to group personnel areas and subareas with common rules with respect to the time quotas (refer to Section 3.1.1).

- **Counting rule**
  Name and description of the counting rule

- **Sequential no.**
  This is the order in which the counting rule is processed.

You can maintain the following in the applicability of rule section of the screen:

- **Conditions for current day**
  - **Weekday**
    Defines which weekdays this counting rule applies to.
  - **Holiday class**
    Defines which holiday classes this counting rule applies to.
  - **Day type**
    Defines which day types this counting rule applies to.

- **Conditions for work schedule**
  - **Counting class for period work schedule**
    Defines which counting classes for period work schedule (PWS) this counting rule applies to.
  - **Daily work schedule class**
    Defines which daily work schedule (DWS) classes this counting rule applies to.

- **Condition for planned hours**
  - **Planned hours = 0**
    Defines whether this counting rule applies if the planned hours are equal to zero.

You can maintain the following in the counting section of the screen:

- **Conditions for absence/attendance**
  - **Planned hours > 0**
    Defines whether this counting rule applies if the planned hours are more than zero.
  - **< 1 day**
    Defines whether this counting rule applies if the absence/attendance recorded is less than one day.
  - **Full-day**
    Defines whether this counting rule applies if the absence/attendance recorded is a full day.

You can maintain the following in the deduction rule section of the screen:

- **Absence/attendance quotas**
  - **Within entitlement**
    Name of the deduction rule that is used to define quota deduction within entitlement.
  - **Over entitlement**
    Name of the deduction rule that is used to define quota deduction over entitlement.

**Deduction rules**

Deduction rules are used to define how the absence or attendance quota is to be deducted when a relevant absence or attendance is recorded.
You can configure deduction rules using the following menu path or configuration table.

**Quick Reference**

**Menu path:** Time Management • Time Data Recording and Administration • Absences • Absence Catalog • Absence Counting • Rules for Absence Counting (New) • Define Counting Rules • Deduction rule for absence quotas

**Table/view:** `V_55ER_B`

Figure 3.24 shows how you can configure deduction rules.

The following explains the usage of each field in the configuration table.

- **ESG Time quota types**
  Employee subgroup grouping for time quotas is used to classify the types of employees for time quotas (refer to Section 3.1.1).

- **PS Grpg Tm Quota Typ**
  Personnel subgroup grouping for time quotas is used to group personnel areas and subareas with common rules with respect to the time quotas (refer to Section 3.1.1).

- **Deduction rule**
  Name and description of the deduction rule.

You can maintain the following in the **Periods** section of the screen:

- **Start**
  Validity start date.

- **End**
  Validity end date.

You can maintain the following in the **Unit of relevant absence quota types** section of the screen:

- **Hours/Days**
  Define whether the quota is in hours or days.

You can maintain the following in the **Absence quota types** section of the screen:

- **Absence quota type**
  Specify the absence quota type.

- **Quota text**
  Description of the quota.

- **Unit**
  Unit of measure used.

You can maintain the following in the **Quota type selection for further deduction** section of the screen:

- **No further deduction**
  Specifies that there shouldn’t be any further deduction from any other quota if the entitlement of quotas specified in the previous option is exhausted.
Sort all other quota types in ascending order
If the entitlement of quotas specified earlier is exhausted, select this option to specify that deduction can happen from other quotas sorted in ascending order.

Sort all other quota types in descending order
If the entitlement of quotas specified earlier is exhausted, select this option to specify that deduction can happen from other quotas sorted in descending order.

You can maintain the following in the Deduction Priority section of the screen:

- **Quota types**
  Specify the priority from Priority 1 to Priority 5 or Not Relevant.

- **Valid from date**
  Specify the priority from Priority 1 to Priority 5 or Not Relevant. You can also specify Ascending or Descending order.

- **Valid to date**
  Specify the priority from Priority 1 to Priority 5 or Not Relevant. You can also specify Ascending or Descending order.

- **Deduction from**
  Specify the priority from Priority 1 to Priority 5 or Not Relevant. You can also specify Ascending or Descending order.

- **Deduction to**
  Specify the priority from Priority 1 to Priority 5 or Not Relevant. You can also specify Ascending or Descending order.

### 3.1.6 Assigning Counting Rules to Absence Types

The final step in the configuration of time quotas is to assign the counting rule to an absence type, which enables the system to deduct the number of hours of absence from the relevant absence quota type.

You can configure this using the following menu path or configuration table.

**Quick Reference**

**Menu path:** Time Management • Time Data Recording and Administration • Absences • Absence Catalog • Absence Counting • Assign Counting Rules to Absence Types

**Table/view:** V_554S_Q

Figure 3.25 shows how you can assign the counting rules to the absence types.

The following explains the usage of each field in the configuration table.

You can maintain the following in the main section of the screen:

- **PS GROUPING**
  Personnel subgroup grouping for absence/attendance types is used to group personnel areas and subareas with common rules with respect to the absence/attendance types. This is further explained in Chapter 4.

- **A/A TYPE TEXT**
  Absence/attendance type to link the counting rule to.

You can maintain the following in the Periods section of the screen:

- **START**
  Validity start date.

- **END**
  Validity end date.

You can maintain the following in the Counting/Quota Deduction section of the screen:

- **COUNTING RULE**
  Counting rule to be used for quota deduction.
3.2 Generating Time Quotas

Now that you’ve learned how to configure all the time quota-generation rules in the system, you’re ready to generate the quotas so that they can be used by the employees. As stated at the beginning of the chapter, quotas are generated in three ways:

- By using time evaluation
- By using SAP standard Report RPTQTA00
- By manual entry

Figure 3.26 illustrates the different methods that can be used to generate quotas in Infotype IT2006 (Absence Quotas) so that an employee can use the quotas.

![Figure 3.26 Methods to Generate Time Quotas](image)

3.2.1 Generating Time Quotas Using Time Evaluation

As explained in Section 3.1.3 of this chapter, you can set up the accrual method for time evaluation to process and generate the quotas automatically based on rules defined within time evaluation. Time evaluation takes into consideration all the selection rules defined (refer to Section 3.1.4). If there are definitions in the selection rule for using day balance and period balance time types as explained in Section 3.1.4, these balances can be passed on from time evaluation to the selection rule and then used for quota generation.

Tips and Tricks

From the requirements and configuration perspective, the quotas generated using time evaluation have the most flexibility in terms of defining the specific rules of the company. The following are two example scenarios that use the time evaluation method:

- **Scenario 1**
  - If there is a requirement to generate time quotas based on the completion of a certain number of hours worked, then the hours worked can be cumulated in time evaluation into a time type bucket. The following steps are required:
    - Set up a base entitlement to be generated.
    - Cumulate hours worked in time evaluation into a time type 9001.
    - Set another time type as 9002 as a flag to set a value of 1 when the employee reaches the hours worked criteria.
    - Set up a Day Balance of time type 9002 as a multiplier in the selection rule definition (refer to Section 3.1.4).
    - Depending on the accrual period, whenever the time type 9001 reaches the hours worked criteria and the flag in time type 9002 is 1, the quota will be generated.

- **Scenario 2**
  - If there is a requirement to reverse the generated time quota based on an insufficient number of hours worked, you can use a similar method to that explained in Scenario 1. Hours worked can be cumulated in time evaluation into a time type bucket. The following steps are required:
    - Set up a base entitlement to be generated.
    - Cumulate hours worked in time evaluation into a time type 9001.
    - Certain checks can be configured in time evaluation rules, and you can set another time type as 9002 as a flag to set a value of –1 in this case.
    - Set up a Day Balance of time type 9002 as a multiplier in the selection rule definition (refer to Section 3.1.4).
    - Depending on the accrual period, whenever the flag in time type 9002 is –1, the quota will be multiplied by –1; hence, it will reverse the generation.
3.2.2 Generating Time Quotas Using Report RPTQTA00

SAP provides the standard report RPTQTA00 to read selection rules and generate quotas. As shown previously in Figure 3.26, similar logic is applied to generate the quotas as in the time evaluation method where report RPTQTA00 also uses the selection rules. Figure 3.27 shows the selection screen of the report.

![Generate Absence Quotas](image)

Figure 3.27 Generating Time Quotas Using Report RPTQTA00

The following explains the usage of each field in the configuration table.

You can maintain the following in the Period section of the screen:

- **Today**
  Select if you want to run the report for the current date.

- **Current month**
  Select if you want to run the report for the current month.

- **Current year**
  Select if you want to run the report for the current year.

- **Up to today**
  Select if you want to run the report up to the current date.

- **From today**
  Select if you want to run the report from the current date.

- **Other period**
  Date range to select between these dates.

You can maintain the following in the Selection section of the screen (clicking on the Further selections button to get access to more criteria if required):

- **Person number**
  Select the personnel numbers.

- **Time recording administrator**
  Select the administrators.

You can maintain the following in the Quotas to be generated section of the screen:

- **Quota type**
  Select quota types to be generated.

You can maintain the following in the Generation type section of the screen:

- **Batch input**
  Select this if you want to generate quotas batch input. Enter a name in the Name of batch input field, enter a date in the Lock batch input session until field, and select the Keep processed session checkbox if you want to keep the session.

- **Direct**
  Select this if you want to generate quotas online directly in the foreground.

- **By record**
  Select this if you want to generate quotas online directly in the foreground record by record.
3.2.3 Manual Entry of Time Quotas

Besides the two methods just discussed, time quotas can be entered manually into Infotype IT2006 (Absence Quotas) or Infotype IT2007 (Attendance Quotas).

Refer to Figure 3.8 in Section 3.1.3. If NO GENER. is selected here, then the absence quota is opened up for manual entry.

Figure 3.28 shows Infotype IT2006, which is enabled for manual entry.

![Figure 3.28 Infotype IT2006 (Absence Quotas): Manual Entry](image)

The following explains the usage of each field in the configuration table.

You can maintain the following in the main section of the screen:

- **Category**: This is the absence quota type, which is the same as the infotype subtype.
- **Time**: The from and to time to define the time frame during which the quotas can be deducted.
- **Quota number**: Specifies the number of hours/days of the quota entitlement.
- **Deduction**: The number of hours/days of the quota deducted.
- **Deduction from**: The start date of the deduction period.
- **Deduction to**: The end date of the deduction period.
- **Neg. deduction to**: Shows negative deduction up to this value. This is set up in the configuration of the absence quota (refer to Section 3.1.2).

3.3 Using Time Quotas

Now, you’ve learned how the time quotas are configured and how they can be generated so employees can use them when they record time. Figure 3.29 shows how time quotas can be used.

![Figure 3.29 Using Time Quotas](image)
For the absence codes that have a time quota attached to them, when the employee enters the time against those absence codes during time recording, the system does a validation check against the corresponding absence quota. If there is enough balance in the quota, the time recording data is saved. If there isn’t enough balance, the system issues an error message for insufficient quota. After the absence record is saved, the number of hours is deducted from the quota right away.

Quota balances and some other accrual information can also be viewed using Transaction PT50 (Quota Overview). Figure 3.30 shows the transaction screen.

![Quota Overview](image1)

**Figure 3.30 Transaction PT50: Quota Overview**

All of the preceding configuration elements for absence quotas are brought together in Figure 3.31, which shows how each element is linked to the other.

Absence quotas are created using the employee subgroup groupings and the personnel subarea grouping. The selection rules are used to generate the quotas. On the other hand, the counting rules and deduction rules are assigned to the absence quotas to define how the quotas are going to be deducted when an absence is recorded.

![Linking Components of Absence Quota Configuration](image2)

**Figure 3.31 Linking Components of Absence Quota Configuration**
3.4 Summary

Time quotas can be viewed as a bank account where a balance is maintained, and every time the employee takes from that balance, it gets depleted. Similarly, time quotas can be earned or accrued and are credited to the time quota account. The accrual of time quotas can be based on several rules defined in the company. After the rules are defined for the quota entitlements, the quotas can be generated and the balances incremented for each employee. Thereafter, the employees can use the quotas as and when they take absences or attendances.

In this chapter, you learned each component in the configuration of the time quota rules for generation. You also learned the different methods used to generate these quotas and how employees can use them.

In the next chapter, you’ll learn about the entire time recording process. We’ll discuss, in detail, how to set up absence/attendance types and how to use them in time recording.
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