

PERSONNEL TIME RECORDING

TUTORIAL FOR CONSULTANTS/KEY USERS



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https://help.sap.com/viewer/product/SAP_BUSINESS_ONE/9.3/en-US and <https://training.sap.com/businessone>.



Requirements for this tutorial

1. The basics of SAP BusinessOne
2. The basics of Beas Manufacturing



Learning targets

After working through the lesson, you will be able to:

1. Define work hours and shifts
2. Monitor attendance
3. Create time evaluations



AGENDA

Personnel Time Recording

1. General

2. Work with personnel time recording (PTR)

HUMAN RESOURCES

Attendance – Master data:

- **Absence types**
- **Hour rule**
- **Shift definition**
- **Day template**

- **Template evaluation**
- **Reports**

AGENDA

Personnel Time Recording

1. General

2. Work with personnel time recording (PTR)

Work with PTR

Factory Calendar

The screenshot displays the SAP S/4HANA Factory Calendar configuration interface. On the left is a navigation menu with the following items: Administration, Choose Company, Web Client, Exchange Rates and Inde, System Initialization, Company Details, General Settings, Configuration wizard, Work station settings wi, **Factory calendar**, Posting Periods, Authorizations, Document Numbering, Document Settings, Report Setup, Print Preferences, Menu Structure, Menu Alias for Searchir, E-Mail Settings, and Opening Balances. The main window title is "Factory calendar [Version: 2021H.11.00.07 SBO: 1000120 for HANA | 0090288900]". The interface is divided into a configuration panel on the left and a calendar grid on the right. The configuration panel includes tabs for "planned capacity", "Master Data", and "Set". It shows "Currently displayed" as "Basic calendar" and "Date" as "10/04/21". The "Day Template" is set to "Fr". Below these are fields for "Basic calendar" (100), "Calendar Capacity Planning" (100), and "Calendar 2" through "Calendar 6" (all 100). The calendar grid shows "October 2021" with days of the week (Mo, Tu, We, Th, Fr, Sa, Su) and dates from 27 to 31. The grid is color-coded: green for working days and red for non-working days. The cells contain week numbers (e.g., CW 40, CW 41, CW 42, CW 43, CW 44, CW 45). A red box highlights the cell for October 4th (CW 41), and a blue box highlights the cell for October 29th (CW 44). At the bottom of the configuration panel are "OK", "Cancel", and "Create" buttons.

Work with PTR

Factory Calendar

The screenshot displays the SAP S/4HANA Factory Calendar configuration interface. The main window, titled "Factory calendar [Version: 2021H.11.00.07 SBO: 1000120 for HANA | 0090288900]", shows a calendar grid for October 2021. The grid is color-coded by workday template (e.g., CW40, CW41, CW42). A "Day Template Fr" dialog box is open, showing settings for the Friday template, including its description "Friday", color, and locked status. An orange arrow points from the "Day Template" dropdown in the main window to the "Day Template" field in the dialog box.

Factory calendar [Version: 2021H.11.00.07 SBO: 1000120 for HANA | 0090288900]

planned capacity Master Data Set

Currently displayed: Basic calendar

Date: 10/04/21

Day Template: Fr

Basic calendar: 100

Calendar Capacity Planning: 100

Calendar 2: 100

Calendar 3: 100

Calendar 4: 100

Calendar 5: 100

Calendar 6: 100

Day Template Fr

Day Template: Fr

Description: Friday

Image: [dropdown]

Color: 0

Locked:

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Shift definition

- Start of work
- Flexitime
- Fix idle times
- End of work



WORK with PTR

Define shifts

The screenshot displays the SAP HR Shift Definition interface. On the left is a navigation menu with the following items: Human Resources, Currently present, Personnel, Employee Master Data, Time evaluation, Recalculation, Report Attendance, Master data, Terminal Functions, Absence types, Wage types, Period rule, Shift Definition (highlighted), Day Template, and Personnel groups.

The main area shows a table titled "Shift Definition" with the following data:

#	...	Group	Shift	Description	Period rule	Locked	Automatic From	Automatic until	Lunch from	Lunch till	Duration lunch
1			Early_Shift	Early shift	STANDARD	<input type="checkbox"/>			12.00	12.50	0.50
2			Shift_01	Shift 01	STANDARD	<input type="checkbox"/>					

An "Shift Definition Edit" dialog box is open, showing the "Work hours" tab. It contains a table with columns: Day Template, Begin from-to, Break 1, Break 2, Break 3, and End from-to. The "Modo" row is highlighted with a red border:

Day Template	Begin from-to	Break 1	Break 2	Break 3	End from-to
Modo	Montag bis Donnerstag	05:30 07:30	08:30 08:45	11:00 11:30	00:00 00:00 14:30 16:30
Fr	Friday	08:00 08:00	00:00 00:00	00:00 00:00	00:00 00:00 17:00 17:00
SaSo	Samstag bis Sonntag	08:00 08:00	00:00 00:00	00:00 00:00	00:00 00:00 17:00 17:00

Buttons for "Update", "Cancel", and "Duplicate" are visible at the bottom of the dialog box. The "Open" and "Cancel" buttons are also visible at the bottom of the main interface.

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Entry for automatic shift recognition

Shift Definition Edit

Master Data Work hours

Shift Code: Early_Shift Locked

Description: Early shift

Group:

Period rule: STANDARD

Flexible lunch break is to be taken between:

Lunch from: 12:00 To: 13:00 Duration: 00:30

If the employee logs on during the following time 'x-x'
That shift is used when 'automatic shift recognition' is activated.

From: 04:00 To: 06:59

Valuation date: Normal

Midnight Time split:

Image: bmp\Clients.png

Color: 10846577

Update Cancel

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Hour rules

Period rule STANDARD

Period rule: STANDARD Locked

Description: Rule Standard

Tolerance before Flextime	Flextime before core time	Core Time	Flextime after core time	Tolerance after Flextime

20 **A** **B** 30

Rounding rule **Hourly surcharge** Time area Extended

Login

Rounding before start of core time (cycle)	<input type="text" value="0"/>
Rounding in Core Time ((cycle))	<input type="text" value="0"/>
Rounding up.. minutes before next cycle	<input type="text" value="0"/>

Logoff

Rounding down during core time	<input type="text" value="0"/>
Rounding down to core time within flextime	<input type="text" value="0"/>
Rounding down to flextime within tolerance	<input type="text" value="0"/>

All values in minutes

Explanation

Rounding up.. minutes before next cycle

X minutes before timing is rounded to the next clock
E.g. with 15 min timing and 5 min rounding
6:10 = 6:15, 6:11=6:30, 6:15=6:30

Update Cancel

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Shift schedule

Personnel administration 13 Automatic Test

Master Data | Shift model | Special shift | Attendance | Absence | Orders | Monthly Quota | Documents

October 2021

Mo	Tu	We	Th	Fr	Sa	Su
27	28	29	30	1 Early_Shift		
4 Shift_01	5 Shift_01	6 Shift_01	7 Shift_01	8 Shift_01		
11 Shift_01	12 Shift_01	13 Shift_01	14 Shift_01	15 Shift_01		
18 Shift_01	19 Shift_01	20 Shift_01	21 Shift_01	22 Shift_01		
25 Shift_01	26 Shift_01	27 Shift_01	28 Shift_01	29 Shift_01		
1	2	3	4	5		

Valid from: 11/01/21 To: 11/05/21 Period rule: STANDARD Shift model: Automatic Shift

Shift model for Employee No. 13

Employee No. 13 For Date from 11/01/21 To

Shift model

Regarding to week plan | Rotation | Manually | Extended

	Shift	Absence reason
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

Add Cancel

Shift model for Employee No. 13

Employee No. 13 For Date from 11/1/2021 To

Shift model

Regarding to week plan | Rotation | Manually | Extended

Select Shift Manually

Selection 1	
Selection 2	
Selection 3	
Selection 4	
Selection 5	
Selection 6	

Add Cancel

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Special shift extra rule

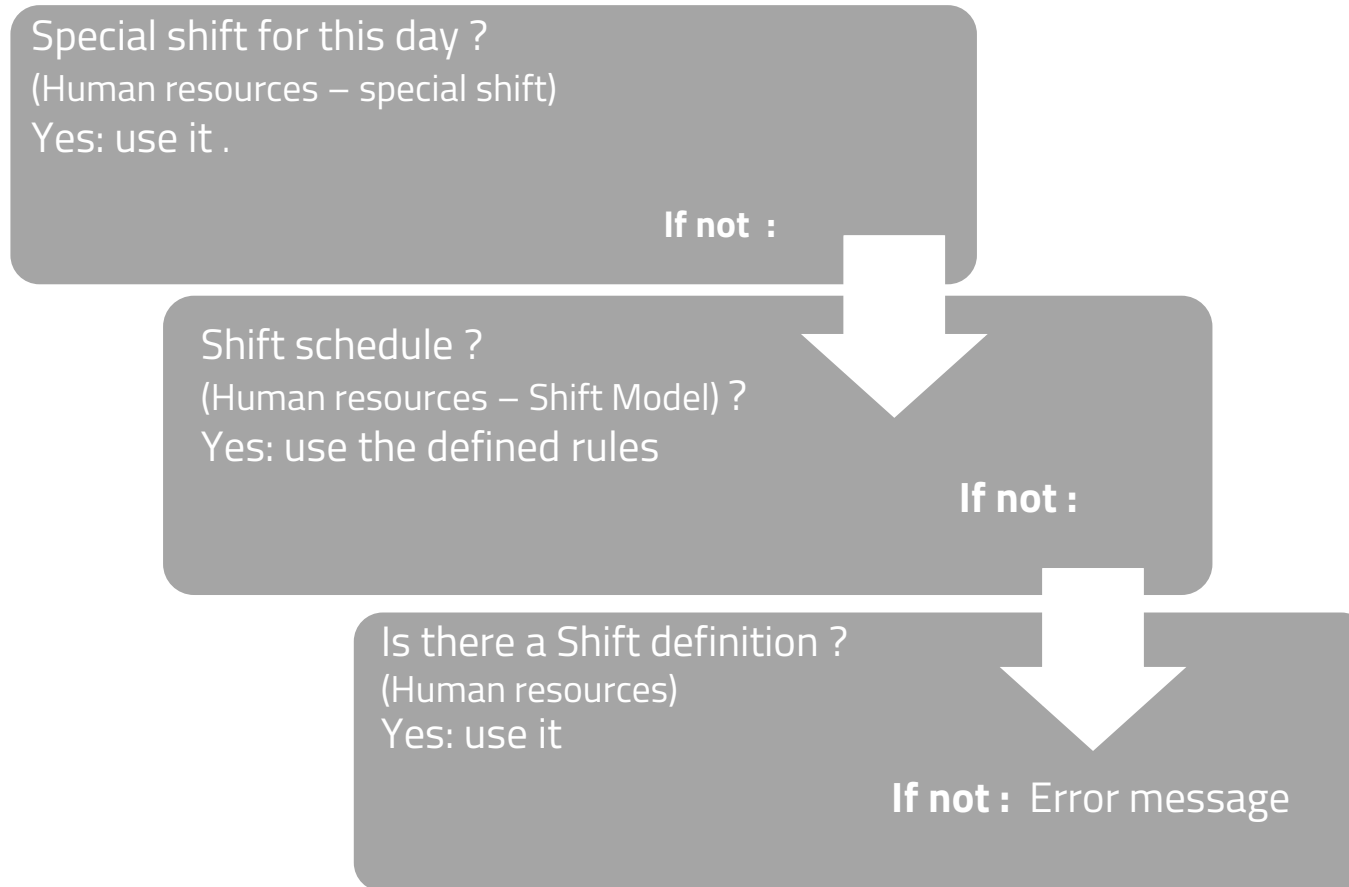
The screenshot displays the SAP Personnel Administration interface for 'Automatic Test'. The main window shows a calendar for October 2021 with a grid of dates and shifts. A red box highlights the 'Early_Shift' entry for October 1st. A 'Special shift' dialog box is open, showing the following details:

Field	Value
Date From	10/1/2021
Date To	10/01/21
Shift	Early_Shift
Information	

The dialog box includes 'OK' and 'Cancel' buttons at the bottom.

WORK with PTR

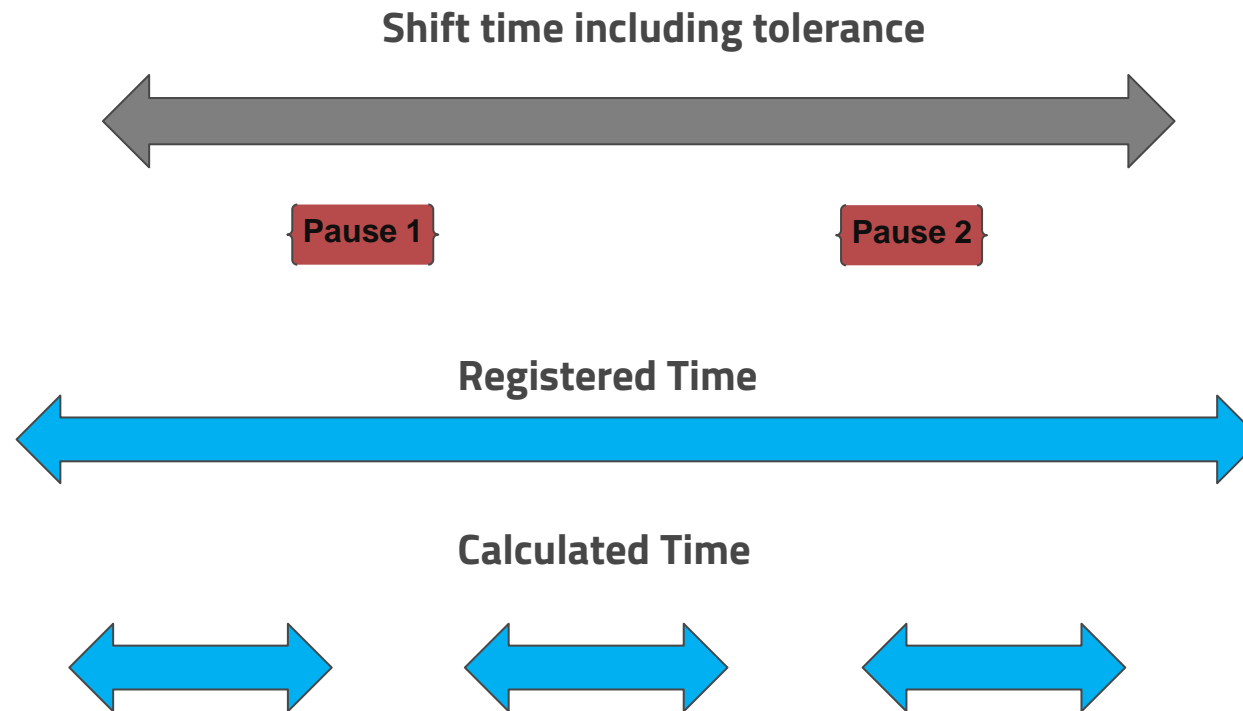
Automatic shift recognition



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Calculation of working time

Only times within the defined shift time and beyond the defined idle time are counted



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Attendance

Symbols in the *Currently present* report

Present



Vacation



Sick



Absent without permission



WORK with PTR

Attendance

Personnel administration 13

Monthly Quota for Personal-ID: 13, Month 11/2021

Master Data | Shift mode

#	Year	Month	Personnel
---	------	-------	-----------

Monthly Values | Wage types

Month: **November** | Year: **2021**

Vacation in Days		Flextime account in hr.		Account 1	Account 2
Used Days	0.00	Change	0.00	0.00	0.00
Used Hours	0.00	Cut off because overrun	0.00		0.00
Rem.days of vacation	0.00	Balance / Current	0.00	0.00	0.00
Surcharge	0.00	Pay-out (subtraction)	0.00		
Total					

Special Days		Attendance	
Sickness	0.00	Planned Time	Days: 0.00 Hours: 0.00
Sickness in hr..	0.00	Actual Time	Days: 0.00 Hours: 0.00
Training Days	0.00	Difference	0.00
Training Hours	0.00		
Holidays	0.00		

Time area		Hourly surcharge			
Time area 1	0.00	From hr.. 1	From hr.. 2	From hr.. 3	
Time area 2		Day of the week	0.00	0.00	0.00
Time area 3	0.00	Saturday	0.00	0.00	0.00
		Sunday	0.00	0.00	0.00

Change Locked

Blocked by

Locked on

Information on entry

< | Open | Cancel | Add | Cancel | Block

WORK with PTR

Time evaluation

Complete report of attendance Print date 05/27/10
Page 1 / 3
Period 05/01/10 - 05/27/10

Name **Johnny Walker**
personnel number **2**

Date	Clock Times From / To Info	Shift	Attendance From / To	Hours Actual / Plan	Difference	Account	Spätschicht Night Shift
05/01/10	Sa			0:00	0:00	0:00	
05/02/10	Su			0:00	0:00	0:00	
We				0:00	0:00	0:00	
05/03/10	Mo 08:00 AM 04:00 PM	early	08:00 AM 04:00 PM	8:00	8:00	0:00	0:00
05/04/10	Tu 07:00 AM 03:00 PM	early	07:00 AM 03:00 PM	7:15	8:00	-0:45	-0:45
05/05/10	We Krank			8:00	8:00	0:00	-0:45
05/06/10	Th Krank			8:00	8:00	0:00	-0:45
05/07/10	Fr Krank			8:00	8:00	0:00	-0:45
05/08/10	Sa Krank			0:00	0:00	0:00	-0:45
05/09/10	Su Krank			0:00	0:00	0:00	-0:45
vWe				39:15	40:00	-0:45	
05/10/10	Mo Krank			8:00	8:00	0:00	-0:45
05/11/10	Tu Krank			8:00	8:00	0:00	-0:45
05/12/10	We Krank			8:00	8:00	0:00	-0:45
05/13/10	Th Krank			8:00	8:00	0:00	-0:45
05/14/10	Fr 09:00 AM 05:00 PM	standard	09:00 AM 04:30 PM	7:00	8:00	-1:00	-1:45

Vac.Hrs	Vac.day	Vac.Last Mo.	Vac.Remain	Vacation/Year	Sick Hrs	Krank-Tage	Holiday Hrs	Holiday	Saturday	Sunday
0:00	0:00	0:00	0:00	0,0	56:00	7,00	0:00	0,0	0:00	0:00

Plan Hrs	Act.Hrs	Difference	Act 1	Prev.Month	Current	Balance	Payed	Act.2	Prev.Month	Current	Balance	Late shift	prem	Night Shift
144:00	116:45	-27:15	0:00	-19:15	0:00			0:00	0:00	0:00		0:00	0:00	

End Print

Write monthly values



Monthly quota

is transferred

WORK with PTR

Configuration wizard

Configuration wizard [Version: 2021H.11.00.07 SBO: 1000120 for HANA | 0090288900]

Attendance

- Activate attendance
- Terminal**
 - Terminal Login Card Number
 - Fast disconnect app attendance
- Personnel**
 - Numeric personnel number
- View**
 - Name UDF 1
 - Name UDF 2
 - Name UDF 3
 - Name UDF 4
- Time evaluation**
 - Display times
 - Automatically Logout
 - Total by week
 - Account Overflow a given day
 - Carry fwd negative balance?
- Day Template**
 - Day Template Day Template Edit
 - Calendar Calendar Setup
- Attendance**
 - Name UDF 1
 - Name UDF 2
 - Name UDF 3
 - Name UDF 4
- Absence types**
 - Absence types Absence types Edit
 - Name UDF 1
 - Name UDF 2
 - Name UDF 3
 - Name UDF 4
- Period rule**
 - Period rule Period rule Edit
- Shift Definition**
 - Shift Definition Shift Definition Edit
- Wage types**
 - Wage types Wage types Edit
 - Name UDF 1
 - Name UDF 2
 - Name UDF 3
 - Name UDF 4
- Reports definition**
 - Reports definition Reports definition

WORK with PTR

Reports

- **Free definable reports on:**
- **Time evaluation, hourly timesheet, time per project / workstation**
- **Other Lists: Monthly working hours, absences, birthdays, holidays**
- **Output in various formats for further processing: Crystal, Word, pdf**

WORK with PTR

Reports

In *Time evaluation – Report definition* you can adjust the report design and change the surcharge descriptions

Reports definition

Reports Name: Standard
Description: Attendance-Report
Title: Attendance-Report

Sum per Week: Footer Print Zoom: 100

Hourly surcharge: from hours % 20 25 60

Attendance-Report Print date: text
Name: Page: 1 / 1
Personnel number: Period:

Date	Clock Times From / To Info	Shift	Attendance From / To	Hours Actual / Plan	Difference	Account	20	25	60			
Vac.Hrs	Vac.day	Vac.last Mo.	Vac.Remain	Vacation/Year.	Sick Hrs	Sick Days	Holiday Hrs	Holiday	Saturday	Sunday		
Plan Hrs	Act.Hrs	Difference	Act 1 Prev.Month	Current	Overflow	Payed	Act.2 Prev.Month	Current	Overflow	20	25	60

OK Cancel Insert line Delete Row Blank Line Insert

WORK with PTR

Reports

In the Personnel master data you can define which report definition should be used for evaluation.

Personnel administration 13 Automatic Test

Master Data	Shift model	Special shift	Attendance	Absence	Orders	Monthly Quota	Documents
Employee No.	13	6	Personnel group				
First Name	Automatic		Cost Center			Centr_z	
Middle Name			Job category				
Last Name	Test		Location				
Display Name	Automatic Test		Active entry?		<input checked="" type="checkbox"/>		
Date of Birth			User			jdg	
Language	E						

Attendance	FDC	Remarks	Login
Date of hire		Branch	
Exit date:		Branches Selection	
Standard annual holiday	0.00	Cost rate on time receipt	100.00 %
Default Shift	Early_Shift	Use own cost rate	<input checked="" type="checkbox"/>
Period rule	STANDARD	Cost Rate per Minute	2.00
Evaluation by report	Standard	Link to resource	
Card Number	13		
Access group	total		
WEB terminal group	total		

Update Cancel Edit User rights Extended Program groups

Alternatively, this can be edited in Time evaluation – Report definition.

Time evaluation

Time evaluation

Personnel numbers

Date: Prev. Month

Time from: 10/1/2021

Time to: 10/31/2021

Reportname

Write Monthly Quota

Print Cancel Reports definition Printer

WORK with PTR

Reports

In this way you can display fixed surcharges directly in the evaluation.

Attendance report

Attendance-Report Print date 08/12/10
Page 1 / 2
Period 06/12/10 - 08/12/10

Name **James Bond**
personnel number **1**

Date	Clock Times From / To	Shift	Attendance From / To	Hours Actual / Plan	Difference	Account	20%	25%	60%
06/12/10	Mo 12:00 AM 03:00 AM	1	12:00 AM 03:00 AM	3:00				2:00	1:00
	06:00 PM 11:59 PM	1	06:00 PM 11:59 PM	6:00			2:00	2:00	
				9:00	8:00	1:00	-160:57		
07/12/10	Tu			0:00	8:00	-8:00	-168:57		
08/12/10	We			0:00	8:00	0:00	-168:57		
Logoff missing! Last logoff: 25.11.10 18:01									
	We			9:00	24:00	-7:00		2:00	4:00 1:00

Vac.Hrs	Vac.days	Vac.last Mo.	Vac.Remain.	Vacation/Year	Sick Hrs	Krank-Tage	Holiday Hrs	Holiday	Saturday	Sunday
0:00	0,00				0:00	0,00	0:00	0,0	0:00	0:00

Plan Hrs	Act.Hrs	Difference	Act.1	Prev.Month	Current	Balance	Payed	Act.2	Prev.Month	Current	Balance	20%	25%	60%
24:00	9:00	-15:00										2:00	4:00	1:00

WORK with PTR

Reports

You can now:

- Define work hours and shifts
- Monitor attendance
- Create time evaluations

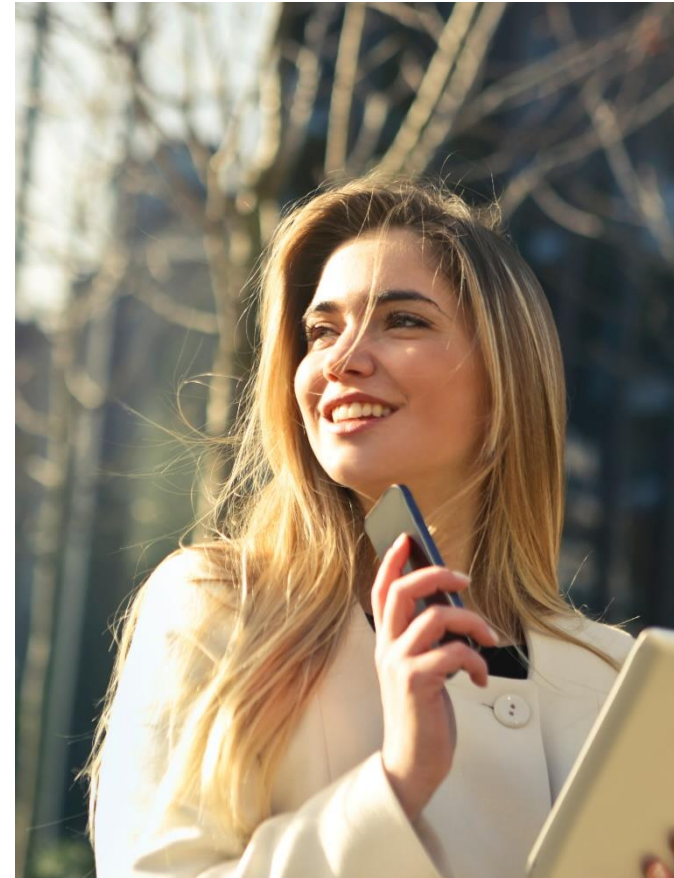
Thank you for your **attention!**

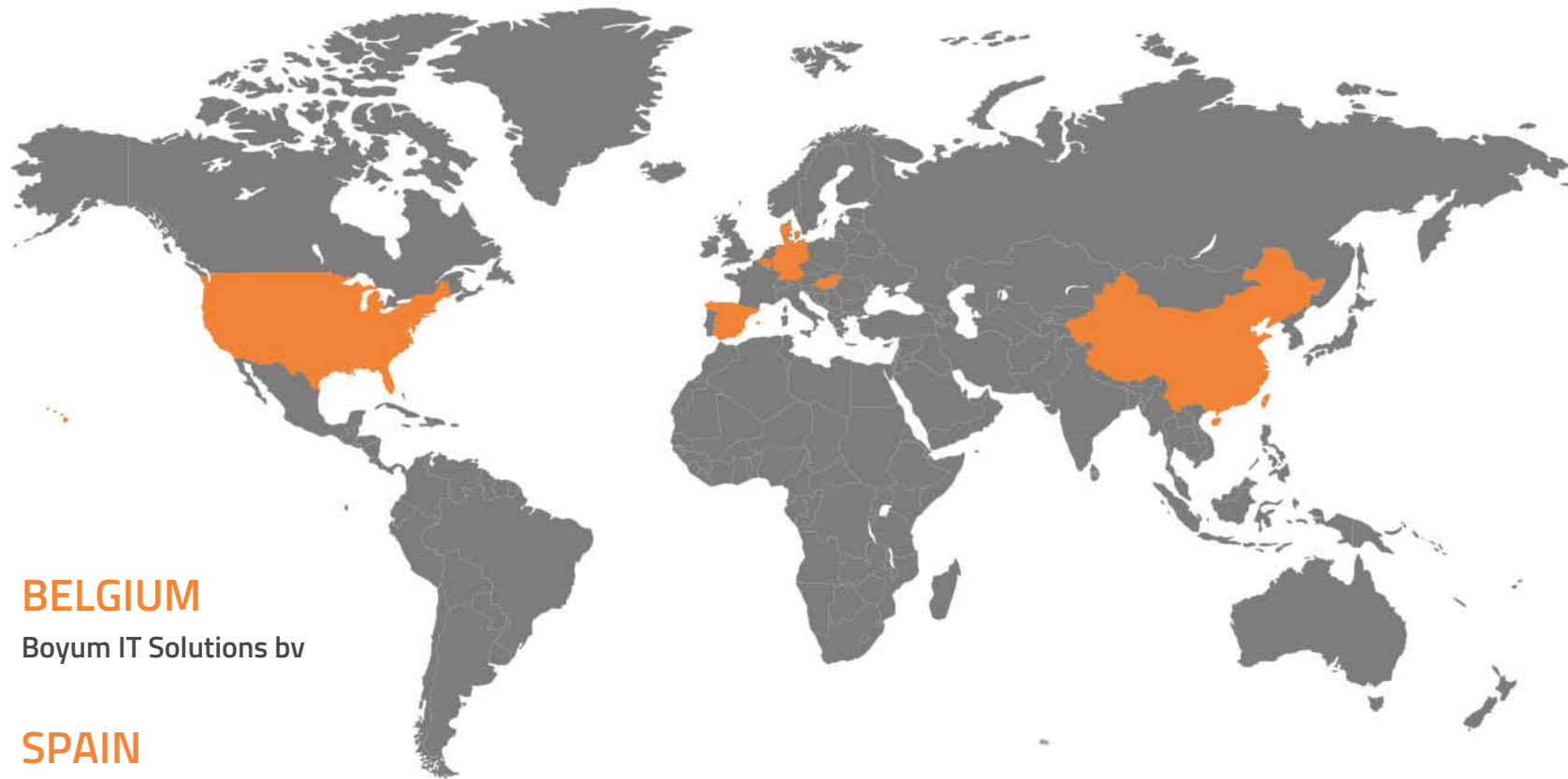
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