Quick Topic - Best Practice if you accrue leave by actual hours worked

Title: Best Practice if you accrue leave by actual hours worked

Brief description:

By default, the Unanet accrual feature allows users to accrue a certain amount based on their months of service. As shown in the highlighted column below, if a user was with the company for over a year but less than 2 years, he/she will accrue 3.34 hours each month.

Some companies, however, need to allow their employees to accrue based on the number of hours worked in each period. In other words, they accrue a varying amount each period based on how many hours they work. This process describes the best practice in dealing with this situation, utilizing a time export and an accrual plan import in Unanet. You export the time to calculate what was earned based on what was worked, then import person accruals to adjust the leave balances in Unanet.

You may also be interested in the pages in the Additional Information section at the bottom of this page regarding Federally Mandated Sick leave, California Sick Leave, or the Maryland Sick and Safe Leave.

Note: this method can apply to any employees, but very often it is the part time employees who need to accrue based on the true hours worked each time period. In this document, we will use the part-time employees accruing based on hours worked as the example throughout.

What's covered in this document:

- Create Accrual Plan Schedule
- Create an export template using the "Time" template type
- Run the Export, then Import to update balances
- Configure the IMU (Integration Management Utility) to automate the export and import processes (OPTIONAL)
    - Lastly, schedule a task to run at desired frequency for importing the accrual adjustments.
- Sample Accrual Template notes
- Additional Information

Create Accrual Plan Schedule

In Admin-Setup-Accrual Plans, create accrual plans to associate with the part time users, where you can specify the Cap Hours if any. Leave Accrual Hours Per period to "0" since all part time accrual amounts will come from the accrual import adjustments steps below. Note that for the cap to be enforced, the plan must post, manually or automatically.

Create an export template using the "Time" template type

1. Create a "Time" export template:

2. Develop the time export to follow person accrual import required format: http://help.unanet.com/current/unanet_menu/admin/import/import_person_accruals.htm
   - A sample export template is attached (only looks at the part time employees' hours).   Vacation Accrual Calculation (by Hours Worked) (1).csv

3. Save the criteria to run on a relative time period. For this example, the template will be run every two weeks.

Run the Export, then Import to update balances

1. Run the export in Admin - Export by clicking the Blue run button. After each run, download the file to a folder and rename it, appending the date to the file name for reference.

   (Note: In place of the user manually downloading the file and saving it with a new name, you could automate this process with the IMU below.)

2. Navigate to "Admin" -> "Import" -> "Person Accrual" function to import the file, browsing to pull the file you previously downloaded and saved.

3. You can run the person accrual details report to view the adjustments, which should resemble the report in the screenshot below.

Configure the IMU (Integration Management Utility) to automate the export and import processes (OPTIONAL)

The process above may be automated via having the IMU run the export template every two weeks. To do this, you would use the "Save Criteria" option, the export would run on a scheduled basis and dump the file into a folder. It would then be moved to the input directory via the IMU and then imported.

Note: the IMU configurations will vary greatly by client. Consulting with Professional Services at Unanet is strongly recommended.

The following section outlines the basic steps needed:

1. Download IMU file sets from the Unanet Support site.
    a. http://www.unanet.com/content/downloads
    b. Please refer to this Help Link for details of IMU: http://help.unanet.com/current/unanet_menu/admin/import /integration_management_utility.htm

2. In the export_config file, customize the URL and login credentials. Modify the run.exports line to resemble the following:

```
SickAccrual.output.file=SickAccrual.csv
SickAccrual.log.file=SickAccrual.out
SickAccrual.export.template=      Part-time Sick Accrual Calculation
SickAccrual.saved-criteria=      Part-time Sick Accrual Calculation
SickAccrual.empty-output-file-ok=true
SickAccrual.args=

VacationAccrual.output.file=VacationAccrual.csv
VacationAccrual.log.file=VacationAccrual.out
VacationAccrual.export.template=      Part-time Vacation Accrual Calculation
VacationAccrual.saved-criteria=      Part-time Vacation Accrual Calculation
VacationAccrual.empty-output-file-ok=true
VacationAccrual.args=
```

3. Similarly, modify the import config file. Note that specify the import type to person_accruals.

```
SickAccrual.input.file=SickAccrual.csv
SickAccrual.log.file=SickAccrual.log
SickAccrual.import.type=person_accruals
SickAccrual.skip-file-check-warning=true
SickAccrual.args=

VacationAccrual.input.file=VacationAccrual.csv
VacationAccrual.log.file=VacationAccrual.log
VacationAccrual.import.type=person_accruals
VacationAccrual.skip-file-check-warning=true
VacationAccrual.args=
```
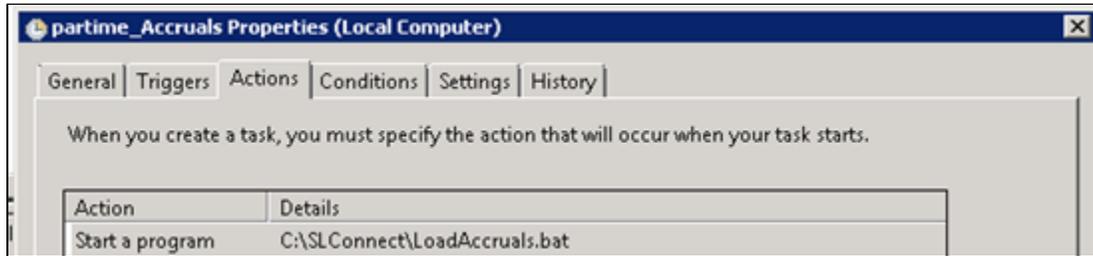
4. Create a separate script file similar to the one below to call the procedures:
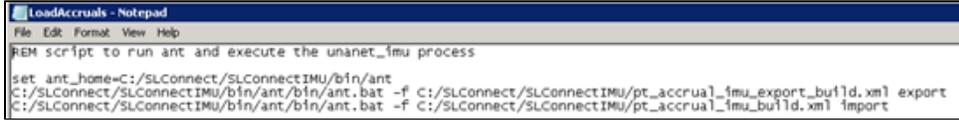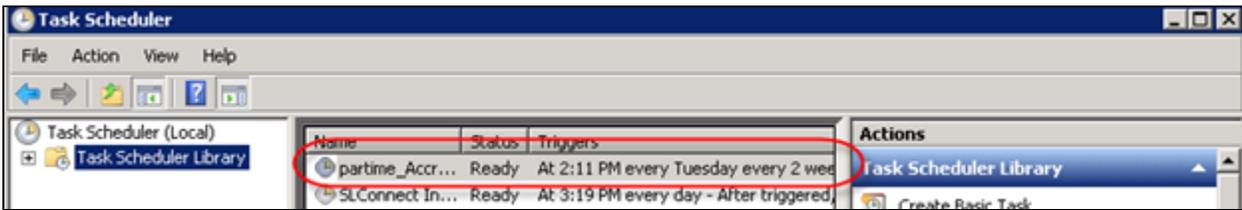
```
LoadAccruals - Notepad
File  Edit  Format  View  Help
REM script to run ant and execute the unanet_imu process

set ant_home=C:/SLConnect/SLConnectIMU/bin/ant
C:/SLConnect/SLConnectIMU/bin/ant/bin/ant.bat -f C:/SLConnect/SLConnectIMU/pt_accrual_imu_export_build.xml export
C:/SLConnect/SLConnectIMU/bin/ant/bin/ant.bat -f C:/SLConnect/SLConnectIMU/pt_accrual_imu_build.xml import
```

Lastly, schedule a task to run at desired frequency for importing the accrual adjustments.

```
partime_Accruals Properties (Local Computer)                              ✕

General | Triggers | Actions | Conditions | Settings | History |

When you create a task, you must specify the action that will occur when your task starts.

Action              Details
Start a program     C:\SLConnect\LoadAccruals.bat
```

Sample Accrual Template notes

Attached is a sample accrual by hours worked template. It uses the accrual plan import (even though the accrual plan isn't actually posting anything), which allows the users to use the accrual details report and see a history of when the balance was updated.

In this example, there are only certain hours that are eligible to earn leave. They are pay codes REG, EH, OCON05, 10, 40 and 25. Also, if hours are coded with those paycodes to any leave tasks, like HOLIDAY, PTO, LWOP etc, hours cannot be earned (alternatively, a LEAVE pay code could simplify this). Finally, after summing up all of these hours, it divides by 10 since in this example they earn 1/10 of their eligible hours worked as leave).

Sample logic: SUM(IF (PAY_CODE IN "REG|EH|OCON05|OCON10|OCON40|OCON25") { IF (TASK_NAME !IN "HOLIDAY|PTO|LEAVE WITHOUT PAY|BEREAVEMENT LEAVE|FAMILY LEAVE|JURY DUTY|UNALLOW HOL + OTHER PD LEAVE|UNALLOWABLE PTO|SHORT TERM DISABILITY|FAMILY MEDICAL LEAVE|LONG TERM DISABILITY|LABOR-ADMIN|SABBATICAL"){ MATH(TSCELL_QUANTITY / 10) } ELSE { 0 }})

Additional Information

Help Docs - Accrual Plans

Help Docs - Integration Management Utility (IMU)

Unanet - Download IMU

Vacation Accrual Calculation (by Hours Worked) (1).csv

KC - Quick Topic - Best Practice if you accrue leave by actual hours worked.

KC - Quick Topic - Federally Mandated Sick Leave

KC - Quick Topic - California Sick Time Accruals Based on Hours Worked

KC - Quick Topic - Maryland Sick and Safe Leave Process