SAP CATS
New system for allocating working time starting from 5/2024

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What and why

- The current SoleTM system, which is used by many universities, is at the end of its life cycle.

- So Certia set out to find an alternative system solution. SAP CATS (**C**ross-**A**pplication **T**ime **S**heet), which has been in use at the University of Helsinki, was chosen as the new system.

- The CATS system is part of the SAP ERP system and it will be introduced to 8 universities during the spring.

- Certia has been in charge of the implementation project, and each university has had its own internal project group.

- As a rule, the functionalities of the system are the same for all univesrities.

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What and why

- Benefits of the system

  - You log in to the system from a familiar address, i.e. the Certia portal
  - The system is also available on mobile devices
  - Modern user interface
  - Three different ways to allocate working time
  - Versatile reporting possibilities

- Watch the CATS introduction video: https://ohjepankki.certia.fi/fi/ohjepankki/sap-cats-esittelyvideo/

Logging in to the system

https://ovi.certia.fi or when using a mobile device https://movi.certia.fi/portal

- Certia's portal will contain the "bricks" for allocating working time
- The teachers' work plan will be piloted in a few units

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Process

Working time allocation process

	Allocation	Confirmation	Check	Approval
Cost center	Employee	Employee	Unit handler	Automatic approval
Internal order	Employee	Employee	Unit handler	Automatic approval
Project	Employee	Employee	Responsible project leader	Unit director

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Process

Working time allocation process

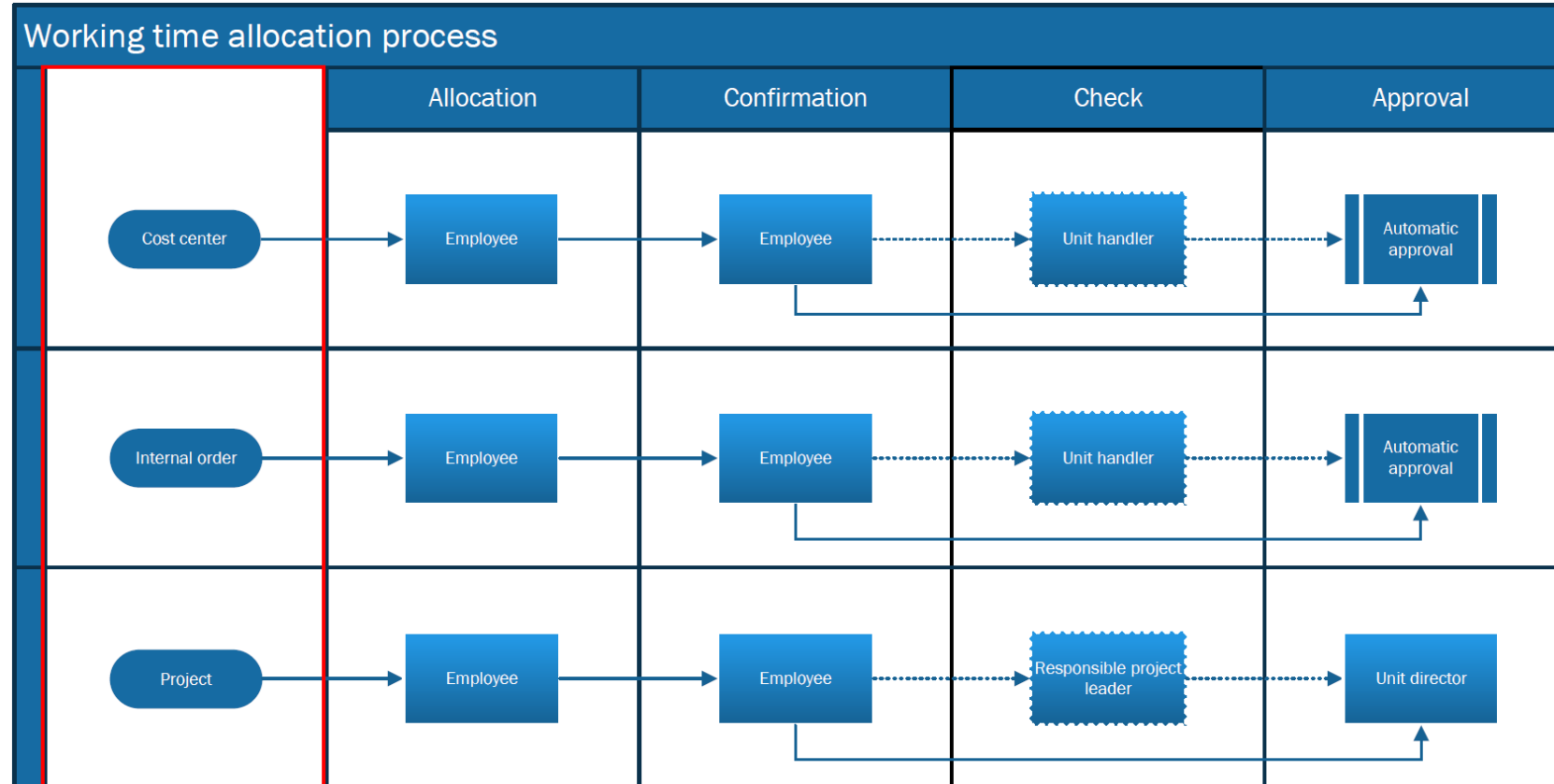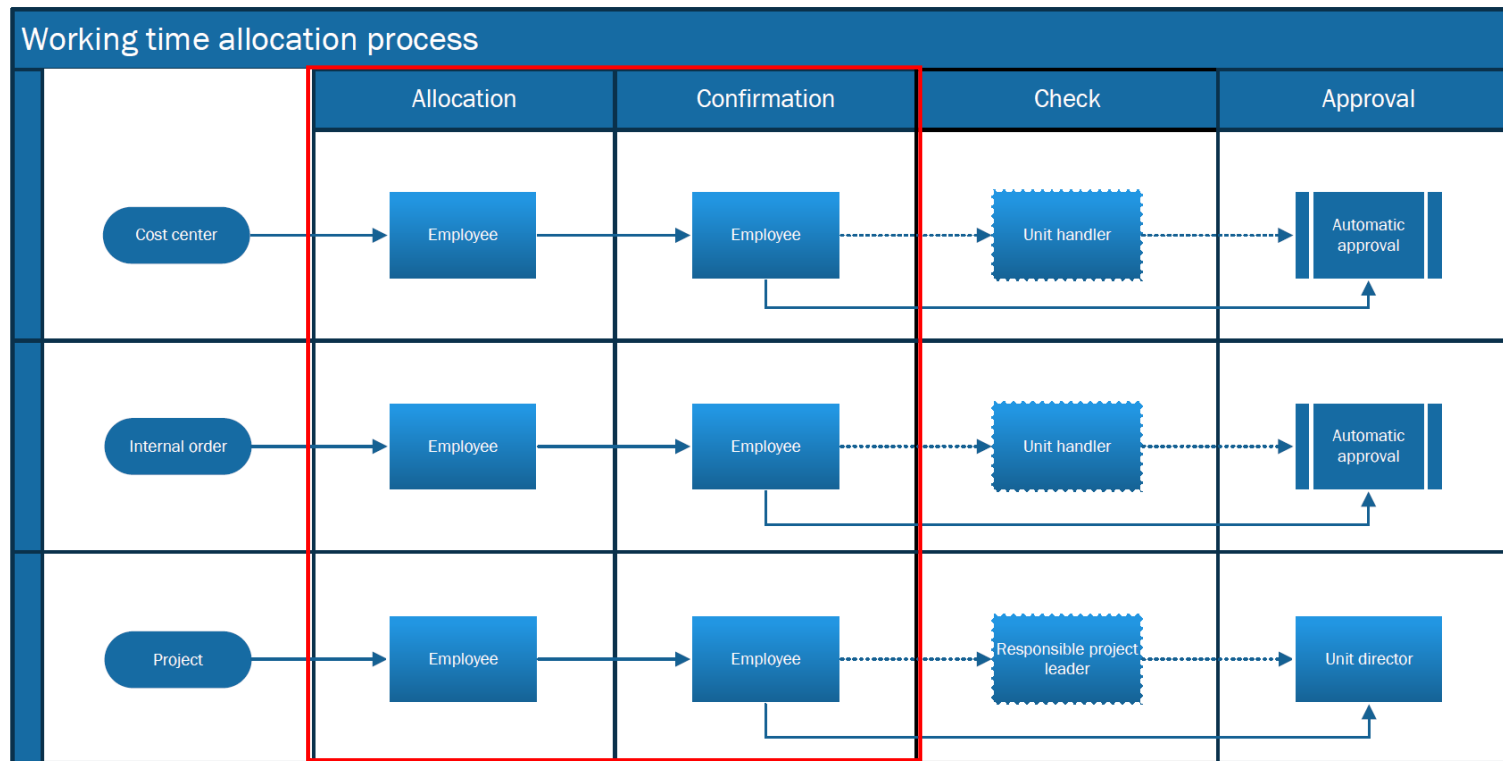|		Allocation	Confirmation	Check	Approval
	Cost center	Employee	Employee	Unit handler	Automatic approval
	Internal order	Employee	Employee	Unit handler	Automatic approval
	Project	Employee	Employee	Responsible project leader	Unit director

- The cost items that work time is allocated to include cost center, internal order, and project
- The cost allocations will remain unchanged, i.e. they will be the same as in the current system, i.e. SoleTM

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Process

Working time allocation process

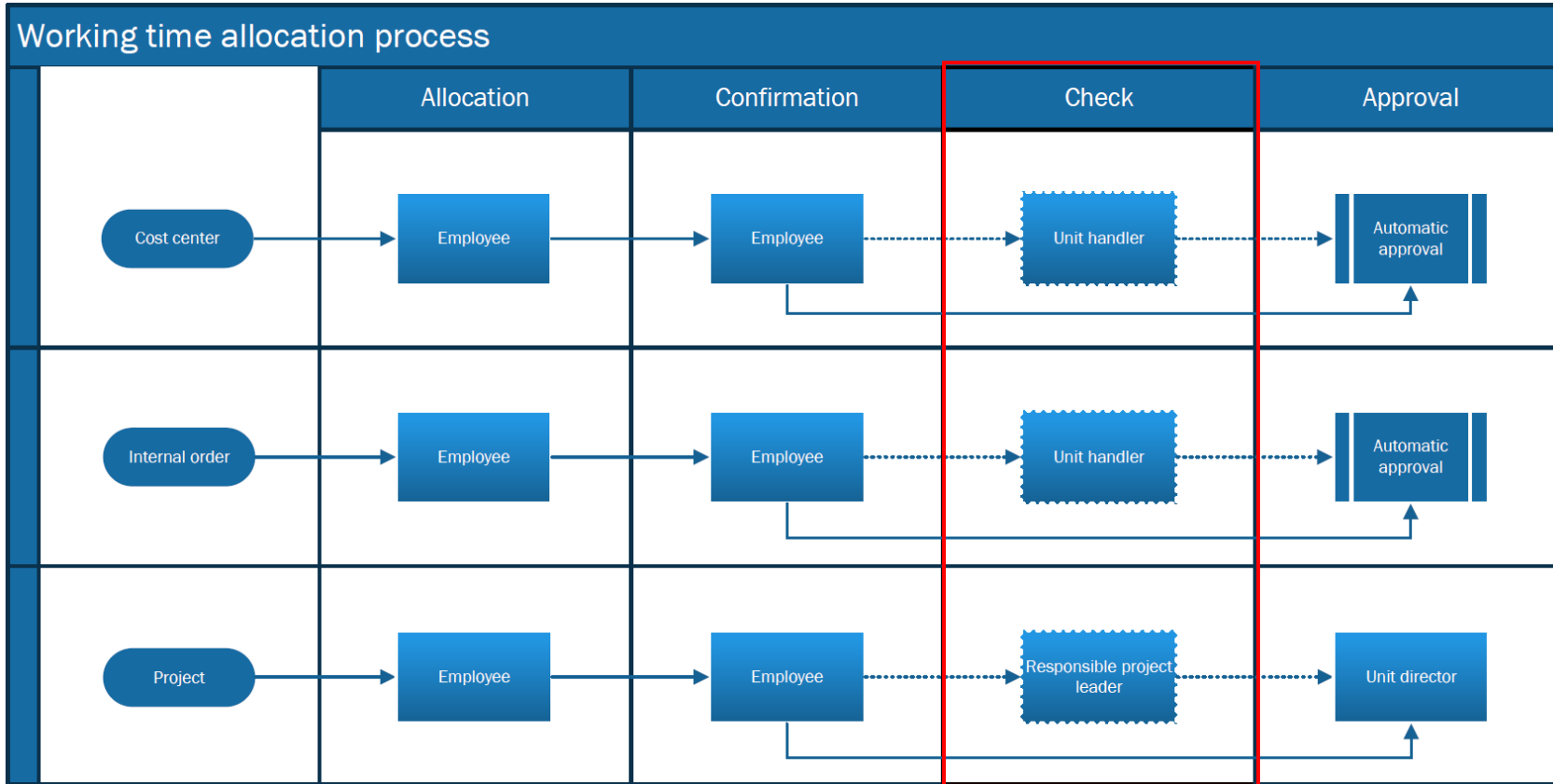|	Allocation	Confirmation	Check	Approval
Cost center	Employee	Employee	Unit handler	Automatic approval
Internal order	Employee	Employee	Unit handler	Automatic approval
Project	Employee	Employee	Responsible project leader	Unit director

- Employees make the allocations themselves and confirm them afterwards
- If you target the past, it will be confirmed at the same time
- The confirmation is an electronic signature required by many project funders
- The confirmation is shown in a report that, if necessary, is delivered to the financier and to the project audit

More information about acknowledgment

- Unconfirmed allocation can be fact-checked and approved
- The confirmation can also be made afterwards; even after approval
- Future allocations are not confirmed, but must be confirmed afterwards, for example monthly
- Allocations made by the employee for the current day and an earlier period are confirmed at the same time as the employee makes the allocation
- Made on behalf of another employee or allocations created by the allocation profile are not confirmed, but the employee must make the confirmation themselves afterwards, for example monthly
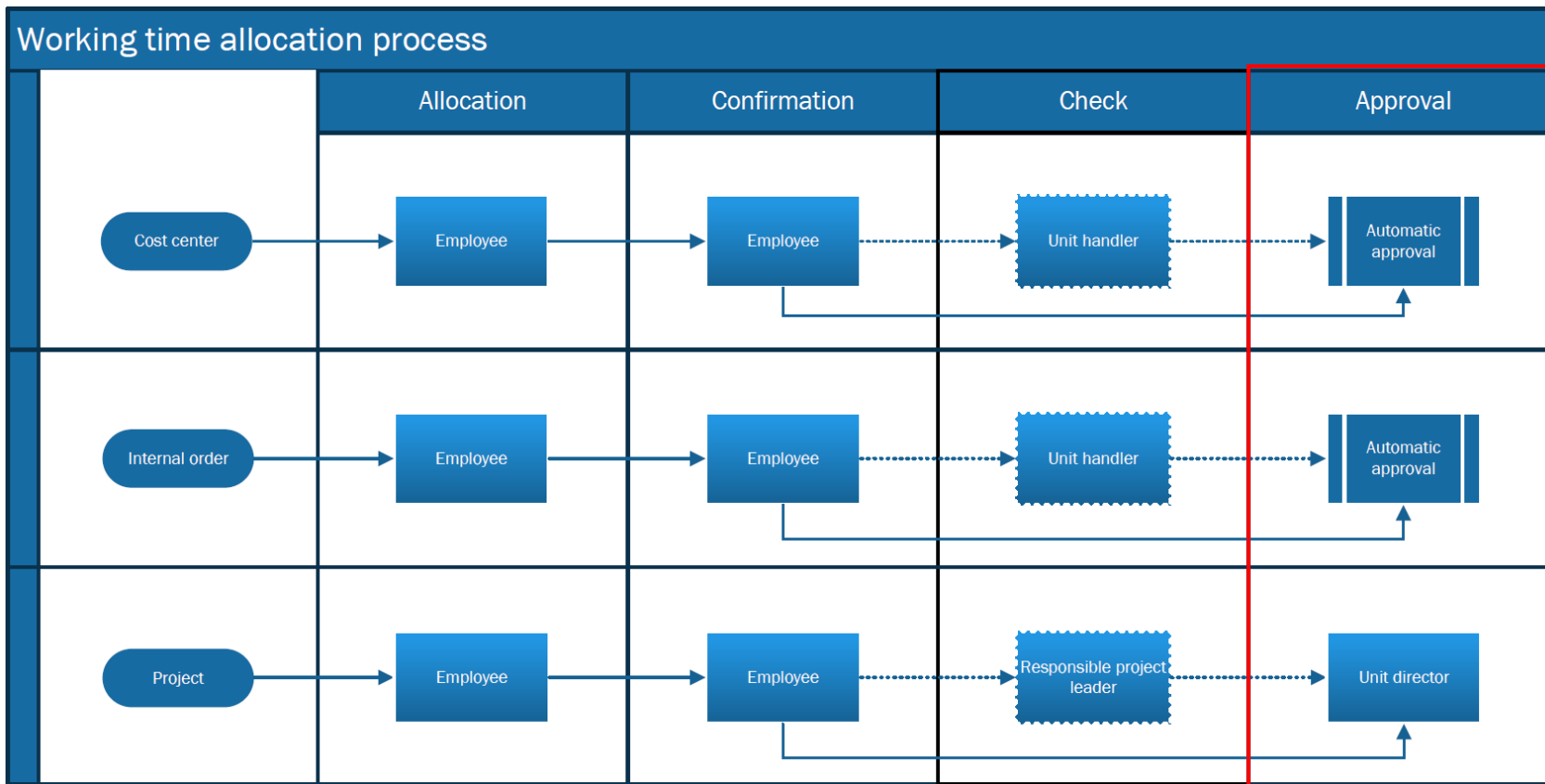
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- From the point of view of the system, factual check is voluntary, i.e. approval does not require factual verification
- Fact-checkers are defined according to the wishes of the units (so-called unit handlers)
- The unit handler can report, fact-check and make allocations on behalf of another person
- Responsible project managers are automatically given fact-checking powers

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Process

Working time allocation process

	Allocation	Confirmation	Check	Approval
Cost center	Employee	Employee	Unit handler	Automatic approval
Internal order	Employee	Employee	Unit handler	Automatic approval
Project	Employee	Employee	Responsible project leader	Unit director

- Approval is automatic for cost center and internal order
- Automatic approval takes place once a month at the end of the 2nd business day of the month
- The working time allocated to projects is approved by the unit director (in accordance with the financial rules) on the 3rd working day of the month

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Three ways to allocate working time

1. Per day
   - Suitable for work that varies significantly from day to day

2. For period
   - Suitable for work that is done daily with the same number of hours and for the same cost items
   - Allows percentage allocation to different cost items

3. Allocation profile
   - Generates an allocation each night for the previous day
   - Suitable for work that is done daily with the same number of hours and for the same cost items
   - Allows percentage allocation to different cost items

Period ending

- 1st business day: prev. month allocations DL

- 2nd working day: fact-checking

- 3rd business day: approval

- 4th business day: financial services "Final Check"

- 5th business day: wage milling*

* *Wage milling refers to the allocation of an employee's wages in accounting and through the employee's salary report and project reports to cost allocations according to the working time allocation*

Corrections

- Already allocated working time can be corrected (reallocated) within the limits of the lock-in dates of the system.

- When an approved allocation is reallocated, its status changes from approved to unapproved, resulting in a reallocation that needs to be re-approved

- Once approved, the allocation and its approval are not deleted, information about the initial approval remains in the system

- If the reallocated working time is approved on the approval date of the following month, the allocation constitutes a correction to the previous allocation in the accounting wage milling

- Corrections to project allocations must always be negotiated and agreed upon with the project's financial expert

Reporting

- PDF report
  - The report shows a summary of allocations by cost item, as well as details of allocations by cost item, including confirmation and approval entries

- Adhoc reporting
  - Multipurpose row-level reporting with multiple search factors to search for allocation data
  - The view can be modified to include the desired information
  - It is possible to save your own selection and view variant
  - Data can be exported to Excel

- Graphical reports (overview)
  - The graphical view consists of various diagrams
  - For example, you can use reports to view the overall status of unit or project allocations

Transition considerations

- Production use of CATS will begin at the beginning of May

- January-April SoleTM allocations will be converted to CATS

- Full-year 2024 allocations can be reported with CATS reports

- January-April allocations can no longer be changed after conversion

- SoleTM allocations made in the future (May-December) are not transferred to CATS and must be redone in CATS

- Previous years' SoleTM allocations can be reported in SAP's Open text archive

- Initially, SoleTM will remain in archive use until 30.6.2024, after which the system will be shut down

Support

- Instructions (text and video) will be added to Patio well in advance of go-live

- Service desk: projektit@oulu.fi

- Project financial experts support and advise on the use of CATS