Oracle Time Management ™ Implementation Guide

Release 11

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Contents

Introduction

Oracle Human Resource Management Systems is the
family name for an integrated group of applications
that support the management of people. Oracle Time
Management is the name for an application that seamlessly
integrates with HRMS and supports the management of
personnel time and attendance.

The Implementation Guide contains the information you
need to implement and use Oracle Time Management . It
describes how to set up time and attendance tables and use
them with HRMS, as well as provides you with helpful tips
on using the manual effectively.

Audience For This Guide

This guide is a complete source of information about using the Oracle Time Management application. It contains overviews and task and reference information for:

- Oracle HRMS users
- payroll managers and staff
- financial managers and others involved in financial management and control
- Installation teams and consultants
- Oracle HRMS system administrators

☞ Attention: This guide includes some information on the basic setup of employees, work structures and compensation and benefits applicable to Oracle HRMS installations. However, for detailed information on the Installation and use of Oracle HRMS, please refer to the Oracle HRMS User's Guide.

The *Oracle Time Management Applications Implementation Guide* assumes you have a basic understanding of human resources management and timekeeping concepts and some familiarity with HRMS. If you have not yet been introduced to the system, we suggest you attend one or more of the Oracle HRMS training classes available through Oracle Education Services (see Other Information Sources).

Note: The information in this guide is also available online in the Help system. Choose the Help icon on the toolbar from any window in the system to Help topics relevant to that window.

How This Guide is Organized

Introduction

Chapter 1 introduces Oracle Time Management and the Implementation Guide. Explaining the audience for the guide and how it is organized, as well as providing the user with other information sources.

Overview

Chapter 2 illustrates initial setup and workflow, introduces basic logon procedures to the Oracle Time Management system, and provides instructions on handling dated information.

Implementation Guidelines

Chapter 3 presents an Implementation Checklist as a guide through the implementation process.

Defining Elements and Modifying Formulas

Chapter 4 presents step-by-step instructions for defining informational and earnings elements as well as the necessary steps for modifying formulas.

Table Setup and Maintenance

Chapter 5 presents step-by-step instructions for setting up and maintaining the time and attendance tables used to further define an organization, payroll, and/or payroll profiles.

Policy Setup

Chapter 6 describes setup of the policy tables which help determine hierarchy and rates for payroll calculations.

Policy and People Assignment

Chapter 7 provides detailed examples of assigning the appropriate tables and policies to earning policies and people.

Other Information Sources

There are additional information sources, including other documentation, training and support services available to you. You may use these additional information sources to increase your knowledge and understanding of Oracle HRMS and your Oracle Time Management Application. We at Oracle want to make these products easy for you and your staff to understand and use.

Oracle Applications User's Guide

This book tells you everything you need to know about entering data, querying, running reports, and other basic features of Oracle applications.

Oracle HRMS Implementation Guide

This guide includes modular implementation flowcharts and checklists to assist with our project planning. It contains a summary of the sequence of recommended steps for implementing Oracle HRMS. The Oracle Human Resources and Oracle Payroll User's Guides contains full instructions for each implementation step.

Oracle Applications Payroll U.S. User's Guide

This guide contains the information needed to set up Oracle Payroll. It describes how to use the earnings, deductions, and tax calculations that come with the system, how to initiate additional earnings and deductions in accordance with your own compensation and benefits policies, and how to manage payroll runs and post–run processing.

Oracle HRMS Technical Reference Manual

This manual contains database diagrams and a description of Oracle HRMS database tables, forms, reports, and programs. This information helps you convert data from your existing applications, integrate Oracle HRMS with other non-Oracle applications, and write custom reports.

Oracle Time Management Application Reference Manual

This manual gives an overview of the Oracle Time Management features and functions, and provides detailed descriptions of the Oracle Time Management application forms and reports.

Oracle Time Management Technical Reference Manual

This manual provides information for understanding the underlying structure and processing of the Oracle Time Management application. It includes information for converting and integrating existing applications with Oracle Time Management and writing custom reports for your Oracle Time Management application.

Oracle Time Management User's Guide

This manual contains the information you need to set up timekeeping tables and use them with Oracle HRMS to manage personnel time and attendance.

Training

We offer a complete set of formal training courses to help you and your staff fully understand Oracle Time Management and quickly reach full productivity. We organize these courses into functional learning paths, so you take only those courses appropriate to your job.

You have a choice of educational environments. You can attend courses at any one of our many Education Centers, or you can arrange for our trainers to teach at your facility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to include information on your own internal procedures as part of a training course using the system.

Support

From on-site support to central support, our team of experienced professional continually provides you with whatever help and information you need to keep Oracle Time Management working for you. This team includes your Technical Representative, Account Manager, and Oracle's largest staff of consultants and support specialists with experience in Time Management, Oracle database management and your particular hardware and software environment.

About Oracle

Oracle develops and markets an integrated line of software products for information management, applications development, decision support, and office automation. Its family of applications products includes financial, manufacturing, human resource and Time management applications.

Oracle products are available for mainframes, minicomputers, and personal computers, and personal digital assistants. This allows organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified information resource.

Oracle offers its products, along with related consulting, education, and support services, in most countries around the world. Oracle is the world's largest supplier of database management software and services.

Thank You

Thanks for using Oracle Time Management and this User's guide.

We appreciate your comments and feedback. At the end of this guide is a Reader's Comment Form. We invite you to use this form to explain what you like or dislike about Oracle Time Management or this User's Guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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Overview

This chapter provides an overview of key components and special features of the Oracle Time Management system

Time and Attendance Management

Oracle Time Management provides a central point for collecting, editing, balancing, and managing time and attendance data prior to submitting to Oracle HRMS for processing. It also automatically generates (autogens) time transactions based on specified criteria. Detailed history records are maintained so that reports may reflect current time and attendance information for any point in time.

Time Collection

Acquiring time and attendance information is the first stage in the Oracle Time Management process. Presently, time and attendance data must be entered directly into Oracle Time Management . In future releases, Oracle Time Management will provide acceptance of time and attendance data from various input sources, including time clocks and the internet.

Table and Policy Setup

To edit, balance, validate and approve time data requires that the tables in Oracle Time Management be properly set up to reflect your company's holiday calendars, earning codes and policies, shift and shift differential policies, work and rotation plans, premium eligibility and interaction.

Exception Management

If exceptions to regular work schedules exist, they can be handled through exception data entry. Reports on exceptions can also be generated.

Variances

Oracle Time Management allows the setup of ranges in earnings, locations, and organizations, so that this information can be used to notify users that the maximum number of earnings hours have been reached.

Project Accounting

Projects can be tracked by hours or dollars, which will allow a manager to request reports on data for a particular period, or for a range of dates to use in projections and forecasting.

HRMS and Oracle Time Management Initial Setup

Before time is entered or received, the system has to be set up for time and attendance management. The following flowchart illustrates the progression of steps necessary to setting up in HRMS and Oracle Time Management.

```
┌─────────────────────────┐
│ CREATE INFORMATIONAL    │
│ ELEMENTS, INPUT         │
│ VALUES, AND             │
│ BALANCE FEEDS           │
└─────────────────────────┘
           │
     ┌─────────────────────────┐
     │ SETUP TABLES AND        │
     │ POLICIES IN ORACLE      │
     │ TIME MANAGEMENT         │
     └─────────────────────────┘
                │
          ┌─────────────────────────┐
          │ ASSIGN APPROPRIATE      │
          │ FORMS TO EARNING        │
          │ POLICIES AND/OR         │
          │ PEOPLE                  │
          └─────────────────────────┘
                     │
               ┌─────────────────────────┐
               │ PRINT OUT REPORTS TO    │
               │ VERIFY POLICY AND       │
               │ TABLE SETUP             │
               │                         │
               └─────────────────────────┘
```
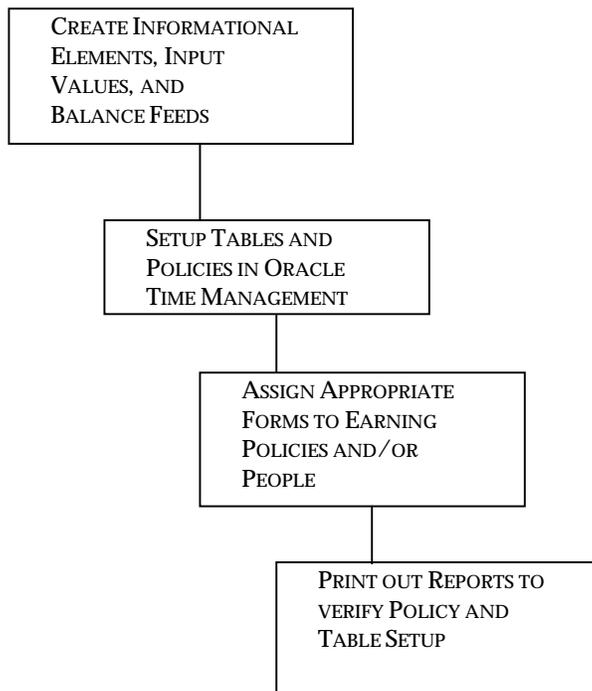
Oracle Time Management and HRMS Workflow

After the system has been set up, the time management process begins with time entry and ends with batches of timecard information submitted to HRMS payroll, Oracle Project Accounting, and General Ledger.

The flowchart below illustrates the entire workflow.

```
┌─────────────────────────────┐
│  AUTOGEN JOB RUN            │
└─────────────────────────────┘
            │
┌─────────────────────────────┐
│  ENTER TIME DATA FOR        │
│  MANUAL RECORDS AND         │
│  EXCEPTIONS TO              │
│  AUTOGENERATION             │
└─────────────────────────────┘
            │
    ┌─────────────────────────────┐
    │  VALIDATE TIME ENTRY        │
    │  AND CLEAN UP ERRORS        │
    └─────────────────────────────┘
                │
        ┌─────────────────────────────┐
        │  APPROVE TIME ENTRY         │
        │  (OPTIONAL)                 │
        └─────────────────────────────┘
                    │
            ┌─────────────────────────────┐
            │  REQUEST REPORTS FOR        │
            │  ADDITIONAL TIME            │
            │  DATA VERIFICATION          │
            │  (ABSENCES, ACCRUALS,       │
            │  VARIANCES, ETC.)           │
            └─────────────────────────────┘
                        │
                ┌─────────────────────────────┐
                │  VALIDATE TIME              │
                │  ACCOUNTING DATA            │
                │  TO BE SENT TO              │
                │  PAYROLL                    │
                └─────────────────────────────┘
                            │
                    ┌─────────────────────────────┐
                    │  SUBMIT ORACLE TIME         │
                    │  MANAGEMENT DATA TO         │
                    │  PAYROLL                    │
                    └─────────────────────────────┘
```
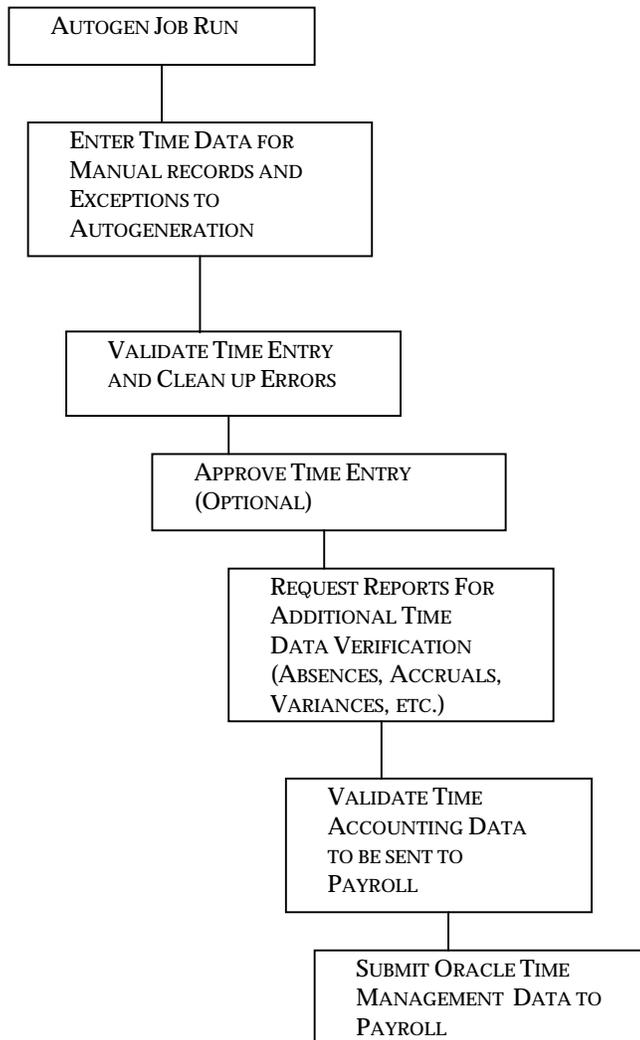
Logging on to Oracle Time Management

When you open Oracle applications, you must log on with a role that gives you access to the Oracle Time Management forms. This setup is done by your system administrator. Normally you may log on as a Oracle Time Management Administrator to access the Oracle Time Management Navigator menu. The illustration below shows the Oracle Time Management menu items. Note that the Navigator title bar displays that the Oracle Time Management Administrator responsibility is selected.
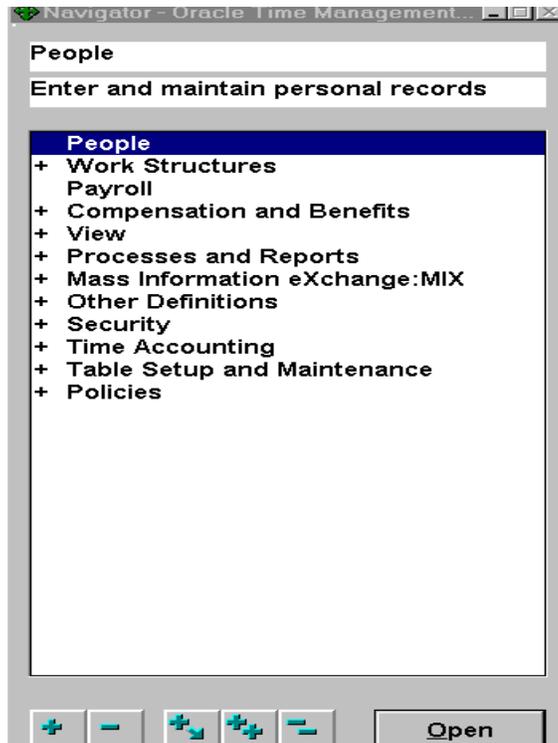
Dated Information

The information in Oracle Time Management regarding your holiday calendars, work and rotation plans, project accounting, shift differential policies, and premium eligibility policies, etc. is dated information. All dated information has From and To dates, that is, dates from and to which it is in effect in your organization. For example, when defining a holiday calendar, you enter a date from which it starts. To close it down, you give it an end date when you no longer need that particular calendar.

Setting Your Effective Date

Effective dating is an Oracle function, and when you log onto Oracle and then to Oracle Time Management your effective date is always today's date. To view information current at another date, or to make past—dated or future—dated changes, you need to change your effective date.

➡ **To set your effective date:**

1. Save any outstanding information you have entered or changed, then choose the Alter Effective Date icon from the Toolbar. The Alter Effective Date window opens.

2. Enter a new effective date and choose OK.
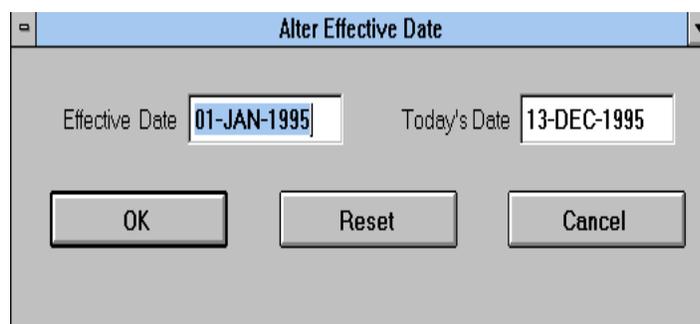
If your current window is a primary window (one called directly from the Navigator), your new effective date remains in place until you reset it or exit Oracle. If your current window is not a primary window, your new effective date only applies while you are working in the current window and any windows subsidiary to it. When you return to a primary window, your effective date is reset to its previous value. So long as your effective date remains different from today's date, it is displayed in the title bar of every window.

Release 11 Considerations

In this release of Oracle Time Management , the following two functions deserve special considerations:

- Do not expire any policies or tables through DateTrack.

- Do not enter time accounting information through Oracle's PayMIX.

Expiring Tables and Policies

Follow the procedures in this manual for expiring tables and policies. DateTrack cannot be used for future dating Oracle Time Management forms. Future dates should be entered manually.

Eliminating Batch Time Entry Procedures

HRMS allows you to enter timecards through a batch process. However, Oracle Time Management is a complete time accounting system that utilizes this same form for validation. For example, absences entered on the Absence Attendance Detail form will not be automatically recorded in Oracle Time Management or sent to Payroll. These exceptions must be entered on the appropriate timecards. Therefore, Oracle Time Management fully replaces PayMIX time entry.

Implementation Checklist

T

his chapter provides an implementation checklist to assist in the setup of the Oracle Time Management system

Implementation Checklist

Define Elements

❏ Define Informational Elements

❏ Define Earnings Elements

Define Oracle Time Management Tables

❏ Plan Table Information

❏ Define Holiday Calendars

❏ Define Shifts

❏ Define Work Plans

❏ Define Rotation Plans

❏ Define Project Accounts

❏ Define Variances

❏ Define Earning Groups

Define Oracle Time Management Policies

❏ Plan Policy Information

❏ Define Hour Deduction Policies

❏ Define Shift Differential Policies

❏ Define Premium Eligibility Policies

❏ Define Premium Interaction Policies

❏ Define Earning Policies

Complete People and Policy Assignment

❏ Complete entry of the Further Assignment form for each
employee and each of his/her assignments

Defining Elements

This section provides instructions for defining elements. The following table summarizes these tasks.

Defining Elements
☐   1.   Create Earning Elements.

Create Informational Elements

Informational elements are those elements that process in Payroll but only update balances, (i.e. vacation and sick leave). Oracle Time Management requires that all non-hour-related earnings be entered as informational elements so that the time entry information may be sent to PayMIX and then on to Payroll for balance updates. From the HRMS application, select the role HRMS Manager. Select Compensation and Benefits followed by Element Description and enter the new informational element. After entering the information on the Element form, complete the Further element Information popup. The following is an example of what to enter for an informational element:

CREATE INFORMATIONAL ELEMENTS
Informational Earning
Name: Informational Earning
Reporting Name: Informational Earning
Description: Earning for Information tracking
Primary Classification: Information
Effective Date From: 01-Jan-1900
Effective Date To: (null)
Processing Type: Nonrecurring
Termination Rule: Final Close
Multiple Entries Allowed: (not applicable in US)
Closed for Entry: No
Process in Run: Yes
Indirect Results: No
Adjustments Only: No
Third Party Payment: No
Currency Input: USD
Currency Output: USD
Qualifying Conditions: None
Priority: Value defaults
Skip Rule: REGULAR_RUNS_NON_TERM_EMPLOYEES
Standard: No

Create Earnings Elements

It is necessary to create earnings elements for all elements to be used with Oracle Time Management and then passed onto Oracle HRMS for further payroll processing (hourly employees). These earnings might include regular pay, overtime, absences, premiums, etc. From the HRMS

application, select the role HRMS Manager. Select Compensation and Benefits followed by Earnings and enter the new earnings element.   After entering the information on the 'Earnings' form, close the form and save. Upon saving the newly entered earning, the system will generate an element description including input values and balance feeds, as well as create the earrings' formula.   The following is an example of what to enter for an earning with a category of Premium:

CREATE EARNINGS ELEMENTS
Shift 1 Differential Premium
Name: Shift 1 Diff Premium
Reporting Name: SD1
Description: Shift 1 differential
Classification: Earnings
Category: Premium
Overtime Base: No
FLSA Hours: Yes
PayMIX Entry Allowed: Yes
Element Processing Type: Nonrecurring
Priority: Value defaults
Standard Link: No
Calculation Rule: HOURS_X_RATE_MULTIPLE_NONRECUR_V2
Separate Check: No
Deduction Processing: All
Effective Date From: 01-Jan-1900
Effective Date To: (null)

Further Element Information:
Earning Category : Shift Diff Premium
Premium Type: Factor/Multiple
Premium Amount: 1.05
                          Due to Oracle Time Management processing logic, it is necessary to include a 1 in the premium amount. For example, a .05 premium must be entered as 1.05.
Processing Order: 31

Define Table Setup and Maintenance

T

his chapter presents a detailed description of the setup of the tables essential to timekeeping.

While this chapter takes you step-by-step into table setup procedures, detailed descriptions of all of the form fields can be found in the *Application Reference Manual.*

Oracle Time Management Tables

Oracle Time Management tables provide the capability of setting up and maintaining time-related information essential to the time entry process. For example, the Holiday Calendar allows the system to recognize paid (and unpaid) holidays. However, for a person to be paid for a holiday:

- The Holiday Calendar must be created and maintained.
- The Holiday Calendar must be assigned to an Earning Policy.
- The Earning Policy must be assigned to the person.
- Manual or automatic time entry must be created for the person during a pay period containing the holiday.
- Time entry information must be sent to PayMIX.

While this manual follows these steps through completion, this section focuses on the setup of the Holiday Calendar and similar tables, which is the first step in the process.

Table Processes

Step-by-step instructions are given for the following table processes:

- table creation
- table maintenance (adding or changing data)
- table assignment to a person or an earning policy
- table review
- table expiration (removing table from use after a specific effective date).

Planning Table Information

Prior to table setup, or any Oracle Time Management entry, an inventory of your time information needs must be assessed, and preliminary tables should be laid out for review to ensure all areas have been provided for and also to avoid duplication.

Table Hierarchy

The menu items on the Navigator are not necessarily in the order that tables may be set up. While table order setup is irrelevant for most tables, it is essential that the Shift table be set up before either Work Plan or Rotation Plan can be set up. The setup information is therefore presented accordingly.

Setting Up Holiday Calendars

Holiday calendars are used

• as a reference tool to determine paid and unpaid holidays. This table is the only area in the system to record this information. Payroll needs to know if a day is considered a holiday at different site locations.

• to automatically generate (autogenerate) a detail time entry line item with the correct number of hours.

• to validate hours taken are correct. Manual time entries are edited to determine if the day worked is a valid holiday; whether the day has actually been charged as a holiday; and if the number of hours entered are correct according to the assigned Holiday Calendar.

Creating a Holiday Calendar

Use the Holiday Calendar window to create a holiday calendar.

To create a Holiday Calendar:

1. Enter name of the calendar in the Name field.
2. Enter an accurate short description of calendar in Description field.
3. Select Earning Type from the List of Values. This field determines if the earnings are stored as holiday hours; select a holiday earning type to ensure this occurs. If no selection is made in this field, hours charged to holidays listed default to the regular or overtime base hour type associated with earning policy the calendar is assigned to.
4. Select Organization from the List of Values. This field is optional.
5. Tab through the Effective Dates block to the Holiday Days block.
6. Enter the first holiday in the Name field.
7. Enter the holiday date in the Holiday Date field. The date entered should be the observed date; for example, if Independence Day is actually July 4th on a Thursday, but management has decided to observe it on Friday, then July 5th is the date that should be entered.
8. Enter number of hours associated with holiday. The number of hours entered correspond to the number of paid hours, if applicable. Enter zero if the holiday is an unpaid holiday; this item is entered for informational purposes only and will not autogenerate a line item on the timecard.
9. Enter the remaining holidays.
10. Save the data.
11. Close the form or create another holiday.

Adding a New Holiday to a Holiday Calendar

Use the Holiday Calendar window to add a new holiday to an existing holiday calendar.

To add a new holiday to an existing calendar:

1. Query to find the holiday calendar to which you wish to add a new holiday.
2. Place cursor in the first blank row (or select Edit/New Record from action bar to insert new line).
3. Enter new holiday in the Name field.
4. Enter new holiday date in the Holiday Date field.
5. Enter number of hours associated with holiday. If you autogenerate timecards, the number of hours entered here will be the number of hours generated. You may wish to enter unpaid holidays for reference purposes; enter zero in this field.
6. Save the data.
7. Close the form.

Assigning a Holiday Calendar to an Earning Policy

A holiday calendar can not be assigned directly to a person. However, a holiday calendar can be assigned to an earning policy, which is then assigned to a person.

To assign a Holiday Calendar to an earning policy:

1.   Select Earning Policy from the Navigator menu.
2.   Query to find the holiday calendar to which you wish to assign to an earning policy.
3.   Cursor to the Holiday Calendar field on the Earning Policy form and select the appropriate holiday calendar from the List of Values.
4.   Close the Earning Policy form.

Reviewing Paid Holidays

Use the Holiday Calendar window to review paid holidays for any organization or calendar name.

To review paid holidays:

1.   Place your cursor anywhere in the Holidays Days block (bottom half) of the form.
2.   Start a query.
3.   Click on any row under the Hours column.
4.   Enter 8 or the appropriate number of paid hours under Hours column.
5.   Run the query. All paid holidays for the organization displays.

To review the paid holidays for other organizations, simply do a Query/Find All for the next organization you are interested in and repeat the steps above.

Expiring a Holiday Calendar

Use the Holiday Calendar form to expire an existing holiday calendar.
Note: Do not delete a Holiday Calendar unless you wish the record removed from the system.

To expire a Holiday Calendar:

1.   Query to find the holiday calendar you wish to expire.
2.   Place cursor in the To field in the Effective Dates block and enter the appropriate end date.
3.   Save the data.
4.   Close the form.

Viewing an Expired Holiday Calendar

Use the Holiday Calendar window to view an expired holiday calendar.

To view an Expired Holiday Calendar:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.

2. Query to find the expired holiday calendar you wish to view. The system brings up the calendar record with effective dates of From your beginning date entered to expired date.

Setting Up Shifts

Shifts define periodic (time in and time out) work schedules. Shifts are used in the work plans, and work plans are used in rotation plans. A person will be assigned to a rotation plan. Shifts must be created before work or rotation plans.

Name	Description	Early Start	Late Stop	Start	Stop	Effective Dates From	To
Basic Day	8 Hour Day, 1 hour lun			08:00	17:00	01-JAN-1980	
3 Hour Aft	3 hours in the afternoo			14:00	17:00	01-JAN-1990	
3 Hour AM	3 hours in the morning			07:00	10:00	01-JAN-1990	
3 Hour Eve	3 hours in the evening			17:30	20:30	01-JAN-1990	
3 Hour Mid	3 hours in the midday			10:30	13:30	01-JAN-1990	
3 Hour PM	3 hours late night			21:00	00:00	01-JAN-1990	
6 Hour Shift	6 hours per day, 5 day			07:00	14:00	01-JAN-1990	
9 Hour days	9 hour day/.75 lunch			07:30	17:15	01-JAN-1990	
AM Shift	The morning shift			08:00	12:00	01-JAN-1990	
Day Shift	Day Shift 0700-1600			07:00	16:00	01-JAN-1990	
Midnight Shi	9 hours over two days			20:00	05:00	01-JAN-1990	
Night Shift	Night Shift 23:00 - 07:0			23:00	07:00	01-JAN-1990	
Off	Scheduled time off			00:00	00:00	01-JAN-1990	
8 Hour Day	8 Hour day/.30 lunch			08:00	16:30	01-JAN-1990	
PM Shift	The afternoon shift			13:00	17:00	01-JAN-1990	

Creating or Adding Shifts

Use the Shift window to create or add shifts.

To create or add shifts:

1. Enter a short, definitive name for the shift.
2. Enter a concise description for the shift.
3. OPTIONAL: Enter the Early Start and Late Stop of the shift if desired. The Early Start and Late Stop become crucial to those situations where people clock in and clock out. The Early Start and Late Stop times recognize that there is a period prior and after the shift start and stop times that is needed to allow all people working that shift to clock in and clock out. Therefore, no additional time is generated for people who clock in and clock out during these periods. However, if a person clocks in before the Early Start time, then that person's hours generated will be based on clock in time, and if a person clocks out after the Late Stop time, then that person's hours generated will be based on clock out time.
4. Enter the start time for the shift in military time in the Start field.
5. Enter the stop time for the shift in military time in the Stop field.
6. Continue steps 1 through 5 to add all desired shifts.
7. Save the data.
8. Close the Shift form.

Expiring a Shift

Use the Shift window to expire a shift.

Note: Do not delete a Shift unless you wish the record removed from the system.

To expire a Shift:

1. Query to find the shift you wish to expire.
2. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.
3. Save the data.
4. Close the form.

Viewing an Expired Shift

Use the Shift window to view an expired shift.

To view an Expired Shift:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.
2. Start and run a query. The system then brings up the shift record.

Setting Up Work Plans

Work Plans identify applicable shifts for each of the seven days of the week. Work Plans are used

- in the autogeneration of hours for each person.
- by Rotation Plans. All rotation plans are made up of at least one work plan.
- for the calculation of Off Shift Premiums and Shift Differential Overrides.
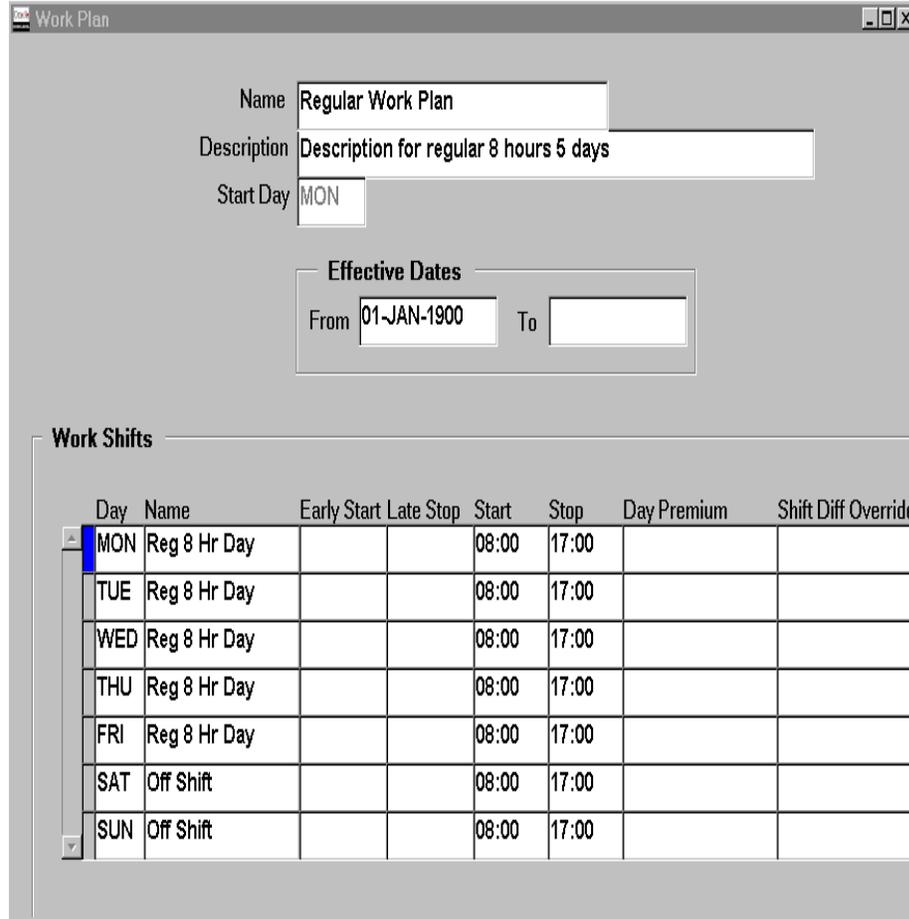
Work Plan

Name | Regular Work Plan
Description | Description for regular 8 hours 5 days
Start Day | MON

Effective Dates

From 01-JAN-1900   To

Work Shifts

Day	Name	Early Start	Late Stop	Start	Stop	Day Premium	Shift Diff Override
MON	Reg 8 Hr Day			08:00	17:00		
TUE	Reg 8 Hr Day			08:00	17:00		
WED	Reg 8 Hr Day			08:00	17:00		
THU	Reg 8 Hr Day			08:00	17:00		
FRI	Reg 8 Hr Day			08:00	17:00		
SAT	Off Shift			08:00	17:00		
SUN	Off Shift			08:00	17:00		

Creating a Work Plan

Use the Work Plan window to create a Work plan.

To create a work plan:

1. Enter name of Work plan in the Name field.
2. Enter a meaningful description of work plan in Description field.
3. Enter the first day of the work week in the Start Day field.
4. Tab through the Effective Dates block to the Name field in the Work Shifts block.
5. Select the appropriate shift. The Early Stop, Late Stop, Start and Stop times display according to the shift selected.
6. Continue selecting all needed shifts.
7. Select a value for the Day Premium field, if and only if your company pays a premium to those persons who work on their days "off". Select the type of premium that will apply to this particular day on this particular shift.
8. If your company pays a premium for those who have worked hours other than their regular shift, select the appropriate earning type for the Shift Diff Override field. Shift differential may be entered in three places: 1) on the timecard; 2) on this form; and 3) on the Shift Differential Policy. Oracle Time Management processes the shift differential premium in the same hierarchy as listed above. That is, a shift differential on the timecard overrides all other shift differentials, and the shift differential on this form overrides the shift differential on the Shift Differential policy.
9. Save the data.
10. Close the form or continue creating work plans.

Assigning a Work Plan to a Rotation Plan

Use the Rotation Plan window to assign a work plan to a rotation plan.

To assign a Work Plan to a Rotation Plan:

1. Query to find the rotation plan you wish to assign work plans.
2. Tab to the Rotation Plan region and select the appropriate work plan and press the Enter key. Continue to select all desired work plans.
3. Save the data.
4. Close the form.

Expiring a Work Plan

Use the Work Plan window to expire an existing work plan.

Note: Do not delete a Work Plan unless you wish the record permanently removed from the system. Also, do not delete a Work Plan if is assigned to a rotation plan.

To expire a Work Plan:

1. Query to find the work plan you wish to expire.
2. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.
3. Save the data.
4. Close the form.

Viewing an Expired Work Plan

Use the Work Plan window to view an expired work plan.

To view an Expired Work Plan:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.

2. Query to find the expired work plan you wish to view. The system then brings up the work plan record.

Setting Up Rotation Plans

Rotation Plans indicate the dates upon which a person is moved from one work plan to another. All people are assigned to a rotation plan, even if that rotation plan only has one work plan on it.

Rotation plans are also used in the autogeneration of hours and the calculation of Off Shift and Shift Differential Override premiums.

Creating a Rotation Plan

Use the Rotation Plan window to create a Rotation Plan.

To create a Rotation Plan:

1. Enter name of Rotation Plan in the Name field.
2. Enter a concise description of Rotation Plan in Description field.
3. Enter the first day of the Rotation Plan in the Start Day field.
4. Tab through the Effective Dates block to the Name field in the Rotation Plan block.
5. Select the appropriate work plan. If only one work plan is selected, that work plan stays in effect indefinitely.
6. Enter the beginning effective date of the work plan in the Start Date Field.
7. Continue selecting all needed work plans.
8. Save the data.
9. Close the form.

Assigning a Rotation Plan to a Person

Use the Person window to assign a Rotation Plan to a person.

To assign a Rotation Plan to a Person:

1.   Select People from the Navigator list.
2.   Query to find the person to whom you wish to assign a rotation plan.
3.   Press the Assignment push-button.
4.   Press the Others push button.
5.   Select Extra Information from the Navigator Options.
6.   The Extra Assignment Information popup displays.
7.   Click in the Details line and the Further Assignment Information popup displays.
8.   Select the appropriate Rotation Plan and press the OK push button.
9.   Close the Person form.

Removing an Assignment between a Rotation Plan and a Person

Use the Person window to remove an assignment between a Rotation Plan and a Person.

Note: When you remove the assignment from one specific Rotation Plan, you must assignment the person to another Rotation Plan.

To remove the assignment between a Rotation Plan and a Person:

1. Select People from the Navigator list.
2. Query to find the person whose rotation plan assignment you wish to remove.
3. Press the Assignment push-button.
4. Press the Others push button.
5. Select Extra Information from the Navigator Options.
6. The Extra Assignment Information popup displays.
7. Click in the Details line and the Further Assignment Information popup displays.
8. Select the new Rotation Plan and press the OK push button.
9. Close the Person form.

Expiring a Rotation Plan

Use the Rotation Plan window to expire an existing Rotation Plan.

Note: Do not delete a Rotation Plan unless you wish the record removed permanently from the system. Deleting a rotation plan prevents an audit trail.

To expire a Rotation Plan:

1. Select Rotation Plan from the Navigator list.
2. Query to find the rotation plan you wish to expire.
3. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.
4. Save the data.
5. Close the form.

Viewing an Expired Rotation Plan

Use the Rotation plan window to view an expired rotation plan.

To view an Expired Rotation Plan:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.
2. The system then brings up the rotation plan record.

Setting Up Project Accounts

Project Accounting allows you to input time and/or dollar estimates for tasks and work orders. Projects can then be tracked by hours or by dollars. Project tracking is done through reports. However, reports for tasks associated with dollar units must be retrieved through Payroll.

This form applies to only manually input time and not autogenerated time entries.

Creating a Project

Use the Project Accounting window to create a project.

To create a project:

1. Enter the name of the project in Project field.
2. Enter a brief description of project in Description field.
3. Enter the number for the project in the Project/Work Order Number field.
4. Select the organization associated with the project.
5. Press the tab key to tab to the Tasks portion of the window.
6. Enter each task for the project on a separate line; enter description and estimate respectively.
7. In the Units field select HOURS or DOLLARS from the list of values.
8. Save the data.
9. Close the form.

Expiring a Project

Use the Project Accounting form to expire a project.

Note: Do not delete a Project unless you wish the record removed from the system.

To expire a project:

1. Query to find the project you wish to expire.
2. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.
3. Save the data.
4. Close the form.

Viewing an Expired Project

Use the Project Accounting window to view an expired project account.

To view an Expired Project:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.
2. Query to find the expired project you wish to view. The system then brings up the project record.

Setting Up Variances

Variance tables define average, high, and low levels by organizations, location, or earnings. This information can be used to notify users that the changes in the expected number of earnings hours have been reached.

Creating a Variance

Use the Variance window to create a Variance.

To create a Variance:

1.   Select appropriate list item for Period field from the List of Values. Press OK.

2.   Select appropriate category from the drop-down list. If Earnings is selected as the category, a report may be requested to display earnings after all data has been transferred to PayMIX.

3.   Select appropriate Type from the List of Values. Press OK. Tab to the Levels block.

4.   Enter the highest number of base hours allowed for the Type and Period in the High field.

5.   Enter the average number of base hours allowed for the Type and Period in the Average field.

6.   Enter the lowest number of base hours allowed for the Type and Period in the Low field.

7.   Save the data.

8.   Close the form.

Expiring a Variance

Use the Variance window to delete an existing variance.

Note: Do not delete a Variance unless you wish the record removed from the system.

To expire a Variance:

1.   Query to find the variance you wish to expire.
2.   Place cursor in the To field in the Effective Dates block and enter the appropriate end date.
3.   Save the data.
4.   Close the form.

Viewing an Expired Variance

Use the Variance window to view an expired variance.

To view an Expired Variance:

1.   Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.
2.   Query to find the expired variance you wish to view. The system then brings up the variance record.

Setting Up Earning Groups

The Earning Group table allows earnings to be grouped together for reporting purposes and to identify those Earning Types you want to include in the accumulation of hours to be used in calculating weekly overtime caps on the Earning Policy.
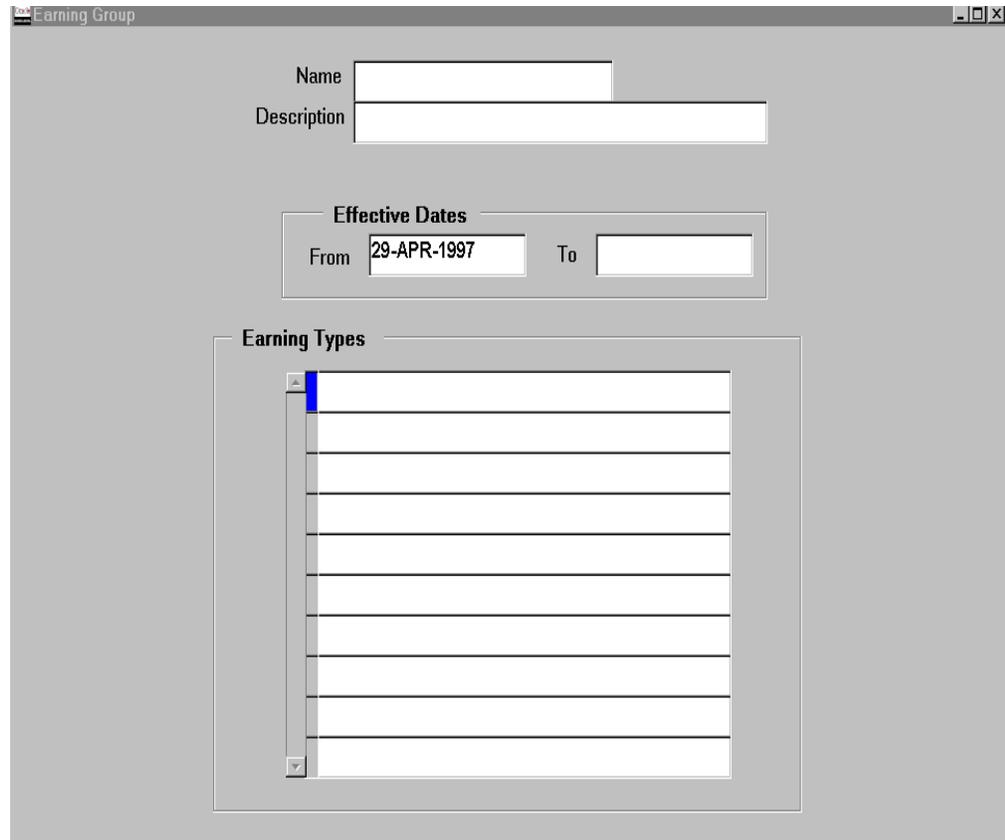
Creating an Earning Group

Use the Earning Group window to create an earning group.

To create an Earning Group:

1. Enter name of earning group in the Name field.
2. Enter an accurate short description of earning group in Description field.
3. Tab through the Effective Dates block to the Earning Types block.
4. Select Earning Type from the List of Values.
5. Continue selecting all earning types required.
6. Save the data.
7. Close the form.

Expiring an Earning Group

Use the Earning Group window to expire an earning group.

Note: Do not delete an Earning Group unless you wish the record removed from the system.

To expire an Earning Group:

1. Query to find the Earning Group you wish to expire.
2. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.
3. Save the data.
4. Close the form.

Viewing an Expired Earning Group

Use the Earning Group window to view an expired earning group.

To view an Expired Earning Group:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.
2. Query to find the expired earning group you wish to view. The system then brings up the earning group record.

Define Policies

This chapter presents a detailed description of policy setup for each of the five timekeeping policies available in the Oracle Time Management system: Hour Deduction, Shift Differential, Premium Eligibility, Premium Interaction, and Earning.

While this chapter takes you step-by-step into creating, assigning, removing the assignments, and expiring these policies, detailed descriptions of all of the policy form fields can be found in the *Application Reference Manual.*

Oracle Time Management Policies

Oracle Time Management policies allow you to set up the rules governing time entry, autogeneration, and how time information is calculated. For example, if a person clocks in and out over a 9 hour period, he would get paid for the entire time unless he had an Hour Deduction Policy that subtracted a 1/2 hour meal and two 15 minute breaks from his time, thus indicating he worked a standard 8-hour day.

The Shift Differential Policy sets up any premiums or differentials paid as a result of people working different shifts. However, as mentioned earlier, it can be overridden on the Work Plan or timecard.

The Premium Eligibility and Premium Interaction policies work together when several premiums are indicated on the Premium Interaction Policy. They must first be included on the Premium Eligibility Policy.

The Earning Policy is assigned to a person, it is an index that contains all the time calculation rules, including Premium Eligibility and Interaction, that will be applied to that individual.

This section focuses on setting up all policies that end in assigning them to the Earning Policy.

Policy Processes

Step-by-step instructions are given for the following policy processes:

- policy creation

- policy maintenance (adding or changing data)

- policy assignment to a person or an earning policy

- policy review

- policy expiration (removing policy from use after a specific effective date).

Planning Policy Information

Prior to policy setup, or any Oracle Time Management entry, an inventory of your time information needs must be assessed, and preliminary policies should be laid out for review to ensure all areas have been provided for and also to avoid duplication.

Policy Hierarchy

The menu items on the Navigator are not necessarily in the order that policies may be set up. While policy order setup is irrelevant for most policies, it is essential that all policies be set up before the Earning Policy can be set up. The setup information is therefore presented accordingly.

Setting Up Hour Deduction Policies

If your company automatically deducts time for a meal and breaks, create hour deduction policies to define these rules. These policies normally apply to clock in/clock out setups or when the total hours for the day are included on the timecard.

Creating an Hour Deduction Policy

Use the Hour Deduction Policy window to create an Hour Deduction Policy.

To create an Hour Deduction Policy:

1. Enter name of hour deduction policy in the Name field.

2. Enter a concise description of the hour deduction policy in the Description field.

3. Tab through the Effective Dates block to the Hour Deduction Rules block.

4. Select the appropriate list item for the Name field.

5. Enter the amount of time to be deducted for the item listed in the Name field. For example, it is common to deduct 15 minutes for breaks; therefore, if BREAK is the name field, enter .25 in the Hours field.

6. Enter the number of hours that are to elapse before the deduction is taken in the Time Period field. For example, if time in is 7:00 and time out is 17:00, total time is ten hours.   However, if BREAK = .25 after 4 hours and MEAL = .50 after 8 hours, the system deducts one hour (2 x .25 + .50) from the ten, which mean nine hours of work time will be generated in the detail area.

7. Continue entering on additional rows in the Hour Deduction Rules block as needed.

8. Save the data.

9. Close the form.

Assigning an Hour Deduction Policy to a Person

Use the Person form to assign an Hour Deduction policy to a person.

To assign an Hour Deduction policy to a person:

1. Query to find the person to whom you wish to assign the Hour Deduction policy.

2. Press the Assignment push-button.

3. Press the Others push-button.

4. Select Extra Information from the Navigator Options.

5. The Extra Assignment Information popup displays.

6. Click in the Details line and the Further Assignment Information popup displays.

7. Select the appropriate Hour Deduction Policy and press the OK push-button.

8. Close the Person form.

Removing an Assignment between an Hour Deduction Policy and a Person

Use the Person form to remove an assignment between an Hour Deduction Policy and a person.

To remove an assignment between an Hour Deduction Policy and a person:

1. Query to find the person to whom you wish to remove the assignment to the Hour Deduction policy.

2. Press the Assignment push-button.

3. Press the Others push-button.

4. Select Extra Information from the Navigator Options.

5. The Extra Assignment Information popup displays.

6. Click in the Details line and the Further Assignment Information popup displays.

7. Select the new Hour Deduction Policy and press the OK pushbutton.

8. Close the Person form.

Expiring an Hour Deduction Policy

Use the Hour Deduction Policy window to expire an Hour Deduction policy.

Note: In this release of Oracle Time Management do not delete an Hour Deduction Policy unless you wish the record removed from the system.

To expire an Hour Deduction Policy:

1. Query to find the Hour Deduction Policy you wish to expire.

2. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.

3. Save the data.

4. Close the form.

Viewing an Expired Hour Deduction Policy

Use the Hour Deduction Policy window to view an expired Hour Deduction policy.

To view an Expired Hour Deduction Policy:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.

2. Query to find the expired Hour Deduction Policy you wish to view. The system then brings up the Hour Deduction Policy record.

Setting Up Shift Differential Policies

The shift differential policy identifies the shift differential start and stop time, and the earnings type to be used for the shift differential premium. If a person works during the shift, he receives that shift differential premium.

Creating a Shift Differential Policy

Use the Shift Differential Policy window to create a shift differential policy.

To create a Shift Differential Policy:

1. Enter the name of shift differential policy in the Name field.

2. Enter a concise description of the shift differential policy in the Description field.

3. Tab through the Effective Dates block to the Shift Differential Rules block.

4. Enter name of the shift differential rule in the Name field.

5. Enter start time of the shift differential in the Start field.

6. Enter stop time of the shift differential in the Stop field.

7. Enter ending time that the original shift is to be carried over in the Carryover field, only if your company's policy is that a person receives the shift differential for the shift he began work in through the carryover stop time, regardless of whether he worked into the next shift. Otherwise, tab to the next field.

8. Select the Premium Earning Type you wished used for the shift differential. This premium must also be on the person's Premium Eligibility Policy.

9. Save the data.

10. Close the form.

Assigning a Shift Differential Policy to a Person

Use the Person form to assign a Shift Differential policy to a person.

To assign a Shift Differential policy to a person:

1. Query to find the person to whom you wish to assign the Shift Differential policy.

2. Press the Assignment push-button.

3. Press the Others push-button.

4. Select Extra Information from the Navigator Options.

5. The Extra Assignment Information popup displays.

6. Click in the Details line and the Further Assignment Information popup displays.

7. Select the appropriate Shift Differential Policy and press the OK push-button.

8. Close the Person form.

Removing an Assignment between a Shift Differential Policy and a Person

Use the Person form to remove an assignment between a Shift Differential Policy and a person.

To remove an assignment between a Shift Differential Policy and a person:

1. Query to find the person to whom you wish to remove the Shift Differential Policy assignment.

2. Press the Assignment push-button.

3. Press the Others push-button.

4. Select Extra Information from the Navigator Options.

5. The Extra Assignment Information popup displays.

6. Click in the Details line and the Further Assignment Information popup displays.

7. Select the new Shift Differential Policy and press the OK push-button.

8. Close the Person form.

Expiring a Shift Differential Policy

Use the Shift Differential Policy window to expire a Shift Differential policy.

Note: In this release of Oracle Time Management do not delete a Shift Differential Policy unless you wish the record removed from the system.

To expire a Shift Differential Policy:

1. Query to find the Shift Differential Policy you wish to expire.

2. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.

3. Save the data.

4. Close the form.

Viewing an Expired Shift Differential Policy

Use the Shift Differential Policy window to view an expired Shift Differential Policy.

To view an expired Shift Differential Policy:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.

2. Query to find the expired Shift Differential Policy you wish to view. The system then brings up the Shift Differential Policy record.

Setting Up Premium Eligibility Policies

A premium eligibility policy lists the authorized premiums associated with each premium eligibility policy. Although the policies define premiums a person is eligible for, this does not imply they will automatically receive them. Eligibility is based on time ranges, actual time worked, and applicable pay rules.

Planning Premium Eligibility Policies

For all premiums and absence earning types your company pays, you must define at least one Premium Eligibility Policy. While a Premium Eligibility Policy is assigned to an Earning Policy, which is then assigned to a person, to avoid duplication and to assign premiums that are appropriate for specific sets of people, plan out logical groupings. For example, people can be grouped by shifts, job functions, work plans, etc., and the appropriate premiums and base hour types can be associated with each group.

The following matrix illustrates one example that would require at least three Premium Eligibility Policies:

People Group	Base Hours Type	Authorized Premiums
Welders	Regular	Welding Premium
	Overtime_1.5	Danger Pay
Fork Lift Drivers	Regular	Work Hard Premium
Office workers	Holiday	Holiday Premium

Since the example shows job function as the logical grouping, all premiums associated with each group should be included so that they may be assigned to one policy.

In Chapter 5, you learned that setting up elements and element links in the first stage in the Oracle Time Management process. If a person is not linked (via Element Link) to the authorized premiums listed on his Premium Eligibility Policy, he will not receive that premium. Therefore, it is essential in the planning stages to ensure the proper links have been made for any premiums that will be authorized on each policy.

Creating a Premium Eligibility Policy

Use the Premium Eligibility Policy form to create a premium eligibility policy.

To create a Premium Eligibility Policy:

1. Enter the name of the premium eligibility policy in the Name field.

2. Enter an accurate short description of the premium eligibility policy in the Description field.

3. Tab through the Effective Dates block to the Base Hours Type block.

4. Select Base Hours Type from the List of Values.

5. Cursor to the Premium Eligibility Rules block.

6. Select the appropriate Authorized Premium.

7. Continue selecting all the authorized premiums that apply.

8. Save the data.

9. Close the form.

Assigning a Premium Eligibility Policy to an Earning Policy

A Premium Eligibility Policy can not be assigned directly to a person. It must be assigned to an earning policy, which is then assigned to a person.

To assign a Premium Eligibility Policy to an Earning Policy:

1. Select the Earning Policy form from the Navigator list.

2. Query to find the Earning Policy to which you wish to assign the earning policy.

3. Cursor to the Premium Eligibility field on the Earning Policy form and select the appropriate Premium Eligibility policy from the List of Values.

4. Save the data.

5. Close the form.

Expiring a Premium Eligibility Policy

Use the Premium Eligibility form to expire an existing Premium Eligibility policy.

Note: In this release of TAMS/O do not delete a Premium Eligibility policy unless you wish the record removed from the system.

To expire a Premium Eligibility Policy:

1. Query to find the Premium Eligibility Policy to which you wish to expire.

2. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.

3. Save the data.

4. Close the form.

Viewing an Expired Premium Eligibility Policy

Use the Premium Eligibility Policy window to view an expired Premium Eligibility policy.

To view an expired Premium Eligibility Policy:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.

2. Query to find the expired premium eligibility policy you wish to view. The system brings up the premium eligibility policy record with effective dates of From your beginning date entered to expired date.

Setting Up Premium Interaction Policies

While the Premium Eligibility Policy determines which premiums a person may be eligible for, it is the Premium Interaction Policy that is key to determining how authorized premiums for a specific premium eligibility policy relate to each other, i.e., order of premium calculation.

Planning Premium Interaction Policies

If you have more than one Authorized Premium per Base Hours Type on a Premium Eligibility Policy, and one premium is to be used as a base for another, you must create a Premium Interaction Policy to indicate that one is to be applied to another. If you only have one Authorized Premium per Base Hours Type on a Premium Eligibility Policy, or if all of them apply only to a base hour, you do not need to create a Premium Interaction Policy.

Premium Eligibility policies are linked to Premium Interaction policies by way of assigning them both to the same Earning Policy.

If your premiums interact with each other (i.e., are to be applied to each other rather than directly to a base hour type), you will need to ensure that you have properly selected the appropriate processing order for each one. For example, if you have two premiums that you pay on regular pay, such as a welding premium and a high risk premium, and you require that one of the premiums is to be applied to the other rather than only to regular pay, the two premiums cannot have the same processing order. One must be higher than the other. It does not matter which one is higher since a factor applied to a factor will give the same result no matter what order they are processed.

To illustrate:

Welding Premium = processing order of 40

High Risk   = processing order of 45

Person's hourly rate = $10

Welding Premium   = factor/multiple of .095

High Risk Premium = factor/multiple of .017

(.095 X $10 = $.95) + (.017 X $10.95 = $.19) = $1.14 total premiums per hour. The system will pass the number of premium hours and the $1.14 rate to payroll.

If both premiums are to be applied directly to regular pay and not to each other, they may have the same processing order. This would result in:

Welding Premium = processing order of 40

High Risk = processing order of 40

Person's hourly rate = $10

Welding Premium = factor/multiple of .095

High Risk Premium = factor/multiple of .017

(.095 X $10 = $.95) + (.017 X $10.00 = $.17) = $1.12 total premiums per hour. A Premium Interaction Policy would not be required in this case.

Before you enter a Premium Interaction Policy, you should create a matrix of your elements so that you may define which elements interact with other elements. You begin by listing all Regular pay elements, then all of your premiums that are factors/multiples. In the first column, list them in processing order. Across the top, list them in reverse order. For example:

ELEMENT Processing Order	SHIFT 3 30	SHIFT 2 30	HARD WORK 20	OVTIME 2.0 15	OVTIME 1.0 15	REG 10
REGULAR 10	INCLUDE	N/A	N/A	INCLUDE	INCLUDE	
OVERTIME 1.0 15	INCLUDE	N/A	INCLUDE			
OVERTIME 2.0 15	INCLUDE	N/A	INCLUDE			
HARD WORK 20	INCLUDE	INCLUDE				
SHIFT 2 30						
SHIFT 3 30						

Creating a Premium Interaction Policy

Use the Premium Interaction Policy form to create a premium Interaction policy.

To create a Premium Interaction Policy:

1. Enter the name of the premium interaction policy in the Name field.

2. Enter an accurate short description of the premium interaction policy in the Description field.

3. Tab through the Effective Dates block to the Base Hours Type block.

4. Select Base Hours Type from the List of Values.

5. Cursor to the Premium Interaction Rules block.

6. Select the appropriate Authorized Premium.

7. Continue selecting all the authorized premiums that apply.

8. Save the data.

9. Close the form

Assigning a Premium Interaction Policy to an Earning Policy

A Premium Interaction Policy can not be assigned directly to a person. It is assigned to an Earning Policy, which is then assigned to a Person.

To assign a Premium Interaction Policy to an Earning Policy:

1. Query to find the Earning Policy to which you wish to assign the Premium Interaction Policy.

2. Cursor to the Premium Interaction field on the Earning Policy form and select the appropriate Premium Interaction policy from the List of Values.

3. Close the Earning Policy form.

Expiring a Premium Interaction Policy

Use the Premium Interaction form to expire an existing Premium Interaction policy.

Note: In this release of Oracle Time Management do not delete a Premium Interaction policy unless you wish the record removed from the system.

To expire a Premium Interaction Policy:

1. Query to find the Premium Interaction Policy you wish to expire.

2. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.

3. Save the data.

4. Close the form.

Viewing an Expired Premium Interaction Policy

Use the Premium Interaction Policy window to view an expired Premium Interaction policy.

To view an expired Premium Interaction Policy:

1. Change the effective date to the beginning date of the period you are interested in viewing prior to premium Interaction policy end date.

2. Query to find the expired premium interaction policy you wish to view. The system brings up the premium Interaction policy record with effective dates of From your beginning date entered to expired date.

Setting Up Earning Policies

Each Earning Policy is a grouping of rules and a holiday calendar that is assigned to each person. The earning policy identifies the daily/weekly base and overtime rules, the holiday calendar, and the premium policies to be used in calculating pay. You must define an earning policy for each set of rules.

Creating an Earning Policy

Use the Earning Policy form to create an earning policy.

To create an Earning Policy:

1. Enter the name of the earning policy in the Name field.

2. Enter an accurate short description of the earning policy in Description field.

3. Select Type from the List of Values.

Select DAILY if you only need to define rules based on a day. For example, if you want overtime paid for all hours worked in a day in excess of 8, then you would select DAILY.

Select WEEKLY if you only need to define rules based on a week. For example, if you only pay overtime for hours in a week in excess of 40, you would select WEEKLY.

Select SPECIAL if you are defining rules that are based on a combination of a day, and/or week, and/or a consecutive days' basis. For example, if you pay overtime for hours in excess of 8 in a day AND 40 in a week, you would select SPECIAL. If you are subject to a double time rule (i.e., if a person has worked more than 12 hours in a day, all hours over 12 are paid at double time overtime, and if a person worked 7 days straight, then the 7th day is paid as double time overtime), you would select SPECIAL.

4. Tab through the Effective Dates block to the Holiday Day Calendar field.

5. Select Holiday Calendar from the List of Values.

6. Select the appropriate Earnings included to meet OVT cap, if applicable.

7. Select the appropriate Premium Eligibility Policy, if applicable.

8. Select the appropriate Premium Interaction Policy, if applicable.

9. Enter the appropriate Minimum T/C Interval, if applicable. . For example, if the minimum time card interval is 15, then time entry hours will be automatically rounded up/down to 15 minute increments. The interval begins at the beginning of an hour, so this example would mean that input and/or generated hours would be 24:00, 24:15, 24:30, 24:45, 01:00, 01:15, etc.

10. Enter the amount in the Round Up At field, if applicable. If the minimum timecard interval is 15 and the roundup at is 8, then time clocked at 24:07 would be rounded down to 24:00, but a time clocked at 24:08 would be rounded up to 24:15. These would be the hours and increments that would be sent to payroll and retained in the database.

11. Tab to the Daily/Weekly Base and Overtime Rules block. The fields in this block are generated by the system based on the kind of type you selected in the Type field You may also enter your own rule names for any other rules that are required. . Enter your rules in the following processing order: 1) Base, 2) Holiday, 3) Weekly, and 4) Special. If you selected (above) DAILY type, the system generates a Name of Base with a Type of DAY. If you selected WEEKLY type, the system generates a Name of Base with a Type of WKL, and a Name of Weekly with a Type of WKL. If you selected SPECIAL type, the system generates a Name of Base with a type of DAY, a Name of Weekly with a Type of WKL, and a Name of Special with a Type of SPC. You may enter your own rule names for any other rules that are required.

12. Save the data.

13. Close the form.

Assigning an Earning Policy to a Person

Use the Person form to assign an earning policy to a person.

To assign an earning policy to a person:

1. Query to find the person to whom you wish to assign the Earning Policy.

2. Press the Assignment push-button.

3. Press the Others push-button.

4. Select Extra Information from the Navigator Options.

5. The Extra Assignment Information popup displays.

6. Click in the Details line and the Further Assignment Information popup displays.

7. Select the appropriate Earning Policy and press the OK push-button.

8. Close the Person form.

Removing a Assignment between an Earning Policy and a Person

Use the Person form to remove an assignment between an Earning Policy and a person. **Note:** When you remove the assignment from one Earning Policy you must assign to another.

To remove an assignment between an Earning Policy and a person:

1. Query to find the person whose assignment you wish to remove.

2. Press the Assignment push-button.

3. Press the Others push-button.

4. Select Extra Information from the Navigator Options.

5. The Extra Assignment Information popup displays.

6. Click in the Details line and the Further Assignment Information popup displays.

7. Select a new Earning Policy and press the OK push-button.

8. Close the Person form.

Expiring an Earning Policy

Use the Earning Policy window to expire an earning policy.

Note: In this release of Oracle Time Management do not delete an Earning Policy unless you wish the record removed from the system.

To expire an Earning Policy:

1. Select Earning Policy from the Navigator list.

2. Query to find the earning policy you wish to expire.

3. Place cursor in the To field in the Effective Dates block and enter the appropriate end date.

4. Save the data.

5. Close the form.

Viewing an Expired Earning Policy

Use the Earning Policy window to view an expired earning policy.

To view an Expired Earning Policy:

1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.

2. Query to find the expired earning policy you wish to view. The system then brings up the Earning Policy record.

Policy and People Assignment

T

he previous chapters illustrated how to define the Oracle Time Management tables
and policies. These tables and policies are key components in assigning the rules
that will be used in the calculation of time and, eventually, pay. This chapter further
explores how Oracle Time Management tables and policies are linked together to
provide the proper assignments for each person.
Additionally, a detailed explanation of the three remaining Oracle Time
Management flexfields that must be entered prior to timecard entry is provided.

Oracle Time Management Form Links

The table below lists the Direct (D) links between a Oracle Time Management table or policy and the form it is assigned to. For example, the Holiday Calendar is assigned to the Earning Policy, and the Earning Policy is assigned to the Further Assignment popup on the HRMS Person form.

FORM	HRMS PERSON/ ASSIGN- MENT	EARNING POLICY	WORK PLAN	ROTATION PLAN
TABLES				
HOLIDAY CALENDAR		D		
WORK PLAN				D
ROTATION PLAN	D			
SHIFT			D	
PROJECT ACCOUNTING				
VARIANCE				
EARNING GROUP		D		
POLICIES				
EARNING POLICY	D			
HOUR DEDUCTION	D			
SHIFT DIFFERENTIAL	D			
PREMIUM ELIGIBILITY		D		
PREMIUM INTERACTION		D		

Entering Further Assignment Information

To access the Further Assignment Information popup for entry:

1. Query on the Person you are interested in.
2. Choose the Assignment push button.
3. Select the Others push-button.
4. Select the Extra Information from the Navigator Options.
5. The Extra Assignment Information popup displays.
6. Click in the Details line and the Further Assignment Information popup displays.
7. Place the cursor in the Autogen Hours YN field and select Yes to autogenerate this person's timecard or No not to autogenerate this person's timecard.
8. Select the applicable Rotation Plan from the List of Values for this person.
9. Select the appropriate Earning Policy from the List of Values. This field and above mentioned fields are the only required fields on this window.
10. If a the person has an applicable Shift Differential Policy, select it.

11. Select any applicable Hour Deduction policy.
12. Save the data.
13. Close the Person form.

```
┌──────────────────────────────────────────────────────────────────┐
│ ▣ Further Assignment Information                          _ □ ✕   │
│ ▤↓ ？                                                             │
│                                                                    │
│       Autogen Hours YN  │Yes          │                      ▲    │
│          Rotation Plan  │Regular Rotation Plan              │ ▒   │
│         Earning Policy  │Basic Earning Policy               │ ▒   │
│  Shift Differential Policy  │Regular Shift Diff Policy       │ ▒   │
│    Hour Deduction Policy │Meal and Break Deductions          │ ▼   │
│                          ◄                                    ►    │
│                                                                    │
│              ┌─────────┐   ┌─────────┐   ┌─────────────┐          │
│              │  Clear  │   │ Cancel  │   │     OK      │          │
│              └─────────┘   └─────────┘   └─────────────┘          │
└──────────────────────────────────────────────────────────────────┘
```

Entering Additional Organization Information

To access the Additional Organization Information popup for entry:
1. Query on the Organization you are interested in.
2. Select the Others push-button.
3. The Additional Organization Information popup will display.

4. Select Time Management Information from the list box and select OK.
5. The Additional Organization Information popup will display.
6. Select the appropriate Timecard Approver from the List of Values if and only if no Supervisor has been entered on the Person window and your company requires Timecard Approval before timecards can be submitted to Payroll. Timecard Approver entry has the following hierarchy: 1) Name entered in Supervisor field on Person form overrides all other names and is the only one to display in the List of Values; 2) Name entered on this flexfield populates the List of Values if and only if no name has been entered on the Supervisor field; 3) If no name is entered on one of these windows, the List of Values is empty.
7. Press the OK push-button to save and close the pop-up.

Time Management Information

Timecard Reporter	
Timecard Approver	

Clear   **Cancel**   **OK**

Glossary

A

Absence Types Categories of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Assignment An employee's assignment identifies his or her role and payroll within a Business Group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is a required component for payment purposes.

Assignment Number A number that uniquely identifies an employee's assignment. An employee with multiple assignments has multiple assignment numbers.

Assignment Set A grouping of employees and/or applicants that you define for running QuickPaint reports and processing payrolls. See also: *QuickPaint Report*

Assignment Status For employees, used to track their permanent or temporary departures from your enterprise, and to control the remuneration they receive. For applicants, used to track the progress of their applications.

Autogeneration Automatic production of timecards or calculation of pay by HRMS based on work plans or schedules

B

Benefit Any part of an employee's remuneration package that is not pay. Vacation time, employer–paid medical insurance and stock options are all examples of benefits. See also: *Elements.*

Block The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next. See also: *Region, Field.*

Business Group The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

C

Calendars In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters, and periods. For each calendar you select a basic period type.

Compensation The pay and benefits you give to employees, including wages or salary, bonuses, health insurance and vacation time. See also: *Elements.*

D

DateTrack When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date. See also: *Effective Date.*

E

Earning Group A collection of earning types used for reporting purposes and/or included in the accumulation of hours to be used in calculating weekly caps.

Earning Policy A grouping of rules and a holiday calendar that is linked to each person. These rules define holidays, premiums, overtime hours, generation rules, time entry rules (hour increments), rounding rules, and rules for processing premiums if more than one premium is applicable.

Effective Date The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window. See also: *DateTrack*

Elements Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

Element Entry The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value. See also: *Recurring Elements, Nonrecurring Elements.*

Element Link The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element. See also: *Standard Link.*

Element Set A group of elements that you define to process in a payroll run, or to control access to compensation information from a customized form, or for distributing costs.

F

Field A view or entry area in a zone where you enter, view, update, or delete information. See also: *Form, Zone, Region.*

Form A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components.

H

Hierarchy An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

Hour Deduction Policy Definition of rules regarding a company's approach to deleting time for meals and breaks in the calculation of pay.

N

Nonrecurring Elements Elements that process for one payroll period only unless you make a new entry for an employee. See also: *Recurring Elements.*

O

Organization A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

P

Payroll A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

Period Type A time division in a budgetary calendar, such as week, month, or quarter.

Position A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Premium Monetary reward applied in the calculation of pay that is over and above the regularly scheduled pay.

Premium Eligibility Policy
Definition for all premiums that a company pays that are based on hours.

Premium Interaction Policy
Definition of the rules regarding the relationships of premiums in the calculation of the pay and the order in which they are processed.

Q

QuickPaint Report A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want. See also: *Assignment Set.*

R

Recurring Elements Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links. See also: *Nonrecurring Elements, Standard Link.*

Region A collection of logically related fields in a zone, marked off from other fields by dotted lines that span the zone. See also: *Form, Zone, Field.*

Report An online or printed information summary derived from Oracle Time Management records or processes.

Responsibility A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities. See also: *Security Profile, User Profile Options.*

Rotation Plan Defined work plan that varies on a set schedule. This plan indicates when a person is to move from one work plan to another.

S

Security Profile Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities. See also: *Responsibility, User Profile Options.*

Shift Definition of daily work schedule, which is used in the setup of work plans.

Shift Differential Policy
Definition of rules for paying a premium on each or certain shifts.

Standard Link Recurring elements with standard links have their elements entries automatically created for all employees whose assignment components match the link. See also: *Element Link, Recurring Elements.*

U

User Profile Options   Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements. See also: *Responsibility, Security Profile.*

V

Variance   Definition of a company's average, high, and low maximum and minimum hours per period by organization, location or earnings. Deviations from these amounts can be reported.

W

Work Plan   Definition of the applicable shift for each of the seven days in a work week.

Work Structures   The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

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