

Implementing Oracle Time Management™ (US)

Release 11.i
(A77087-01)

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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.

This chapter introduces you to accessing Oracle Time Management and describes key components and special features of the system. It also explains the organization of the Implementation Guide and introduces other useful sources of information.

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

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).

How This Guide is Organized

Introduction

Chapter 1 is an introduction to Oracle Time Management and the Implementation Guide. This chapter defines the audience for the guide and explains how it is organized. It also provides the user with other information sources.

Overview

Chapter 2 illustrates the initial setup of the system. The basic workflow of time related information is discussed. Basic Oracle Time Management logon procedures are explained. Instructions on handling dated information are also provided.

Implementation Guidelines

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

Project Accounting

Chapter 4 presents the Project Accounting Interface explanation in detail.

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 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 Implementation 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 (415) 506-7000.

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CHAPTER

2

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. Oracle Time Management also accepts time and attendance data from timeclocks via supported API's (Application Program Interfaces).

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

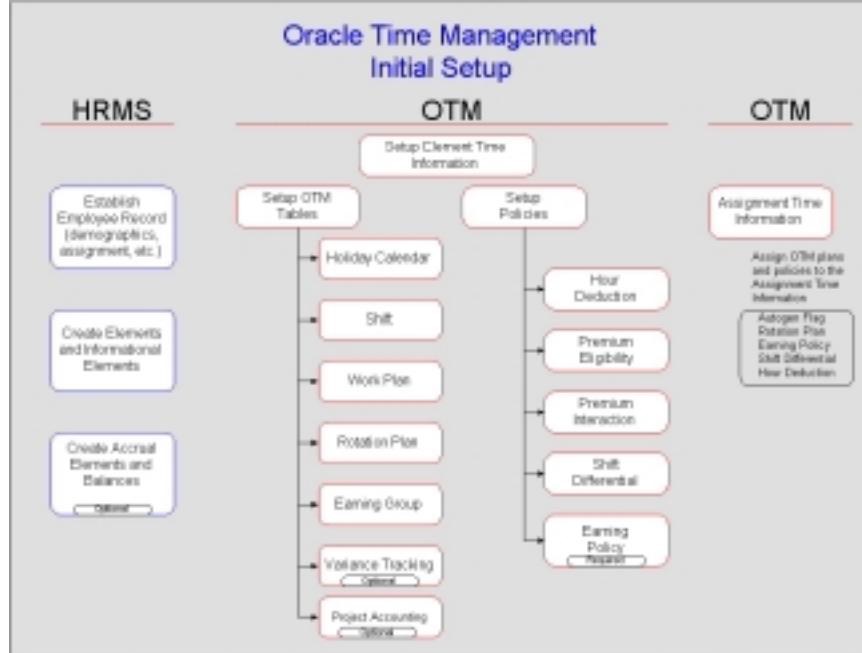
Oracle Time Management allows the setup of ranges in earnings, locations, and organizations, so that this information can be used to notify users that the maximum number of earning hours have been reached.

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

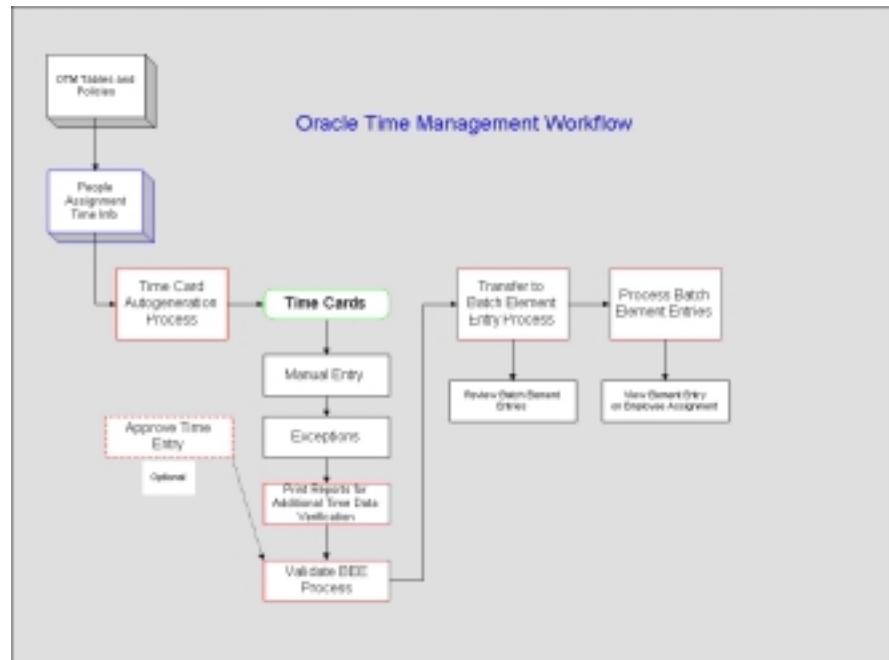
The system must be configured for time and attendance management before time related records can be processed. The following flowchart illustrates the steps that are necessary to accomplish this.



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, Oracle Project s.

The flowchart below illustrates the entire workflow.



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 Manager 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 Manager responsibility is selected.



Dated Information

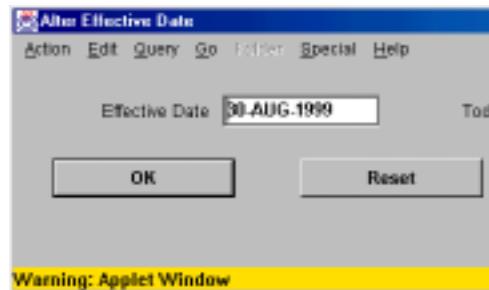
The information in Oracle Time Management regarding your holiday calendars, work and rotation plans, project accounting, shift differential policies, and premium eligibility policies, etc. is dated information. All dated information has From and To dates, that is, dates from and to which it is in effect 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.

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.i Considerations

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

- The dependencies upon Oracle US Payroll were eliminated.
- Oracle Time Management is now support by Batch Element Entry (BEE). This mechanism replaces PayMix and is used to transfer time accounting data.
- The Core Timecard is for entry of time accounting in Non-US localizations only. US customers will continue to use the existing timecard. The difference between the non-US and the US timecard is the elimination of three fields under the Additional Information section on the Non-US version. Those three fields are Location, Separate Check and Tax Rule.
- Oracle Time Management cannot process elements established as a Flat Amount. However, via Oracle Time Management Element Time Information, an element can be set up to accept a flat premium amount.
- Oracle Time Management cannot process Recurring Elements.
- Prior to establishing a Work Plan, an “off” shift must be created. This shift must have the Start and Stop times of 00:00, or hours equal to zero.

CHAPTER

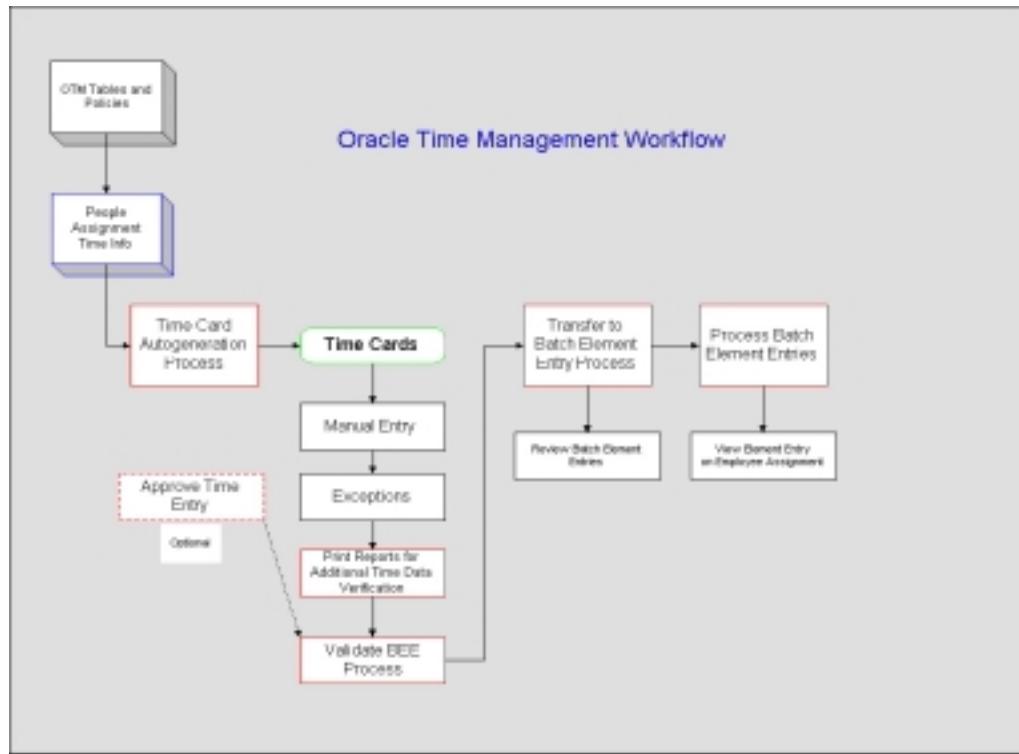
3

Implementation Checklist

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

Implementation Checklist

The following chart illustrates the steps involved in creating the Oracle Time Management tables and policies.



Define Elements

Define Time Related Elements

Define Oracle Time Management Tables

- Plan Table Information
- Define Holiday Calendars
- Define an OFF Shift
- Define Shifts
- Define Work Plans
- Define Rotation Plans
- Define Project Accounts (optional)
- Define Variances (optional)
- Define Earning Groups

Define Oracle Time Management Policies

- Plan Policy Information
- Define Hour Deduction Policies (optional)
- Define Shift Differential Policies (optional)
- Define Premium Eligibility Policies (optional)
- Define Premium Interaction Policies (optional)
- Define Earning Policies

Complete People and Policy Assignment

- Complete entry of the Assignment Time Information for each employee and each of his/her assignments

Project Accounting Interface

This chapter details the feature known as Project Accounting.

In an effort to further expand the functionality of the Project Accounting process, the expenditure type field was redefined as a segment on the Element Time Information Window. The valid expenditure types within the Oracle Projects, defines the data contained within the List of Values for this segment. This gives you the flexibility to assign elements to the appropriate expenditure type that is defined in the Projects system.

Project Accounting

Oracle Time Management allows you to track timecard information by projects and task that are established in the Oracle Project Accounting application. Time records may be associated with any of the project and task codes within Project Accounting.

After project and task information has been entered on the timecard, the Project Accounting Application Programming Interface (API) for Transaction Control is called to validate the project and task information. This validation is based upon the Transaction Control information established within Project Accounting. If the Transaction Control API returns an error, you will not be allowed to save the timecard until the error is resolved. Generally, you would need to change either the project or task information.

The actual transfer of timecard data to Project Accounting will be performed using stored procedures and the Oracle Applications Concurrent Manager. Transfer processing includes:

- Transfer of all pending timecard details for a specified payroll period.
- Proper selection of the salary rate for the employee being processed, when no override rate has been entered.
- Identification and calculation of all applicable premiums and pay multiples associated with the elements that were entered on the timecard.

- Transfer of all flat amounts entered on the timecard or associated with the pay element currently being transferred.
- The actual interface to Projects inserts detail rows into the PA_TRANSACTION_INTERFACE_ALL table utilizing the standards described in the Oracle Financials and Oracle Government Financials Open Interfaces Manuals.

The Transfer to Project Accounting process is designed to run after the Transfer To BEE process within the Oracle Time Management system. The process is designed to run on the same cycle as the pay cycle.

NOTE: In order for the Transfer To Project Accounting to be successful, the project information must already be established within Project Accounting. In addition, the timecard must be validated and transferred to BEE (the batch status will be displayed as “Ready”).

Project Accounting (Retro)

There is a separate process to transfer Retro Time Adjustment records to Project Accounting. You can run the Transfer to Project Accounting (retro) process after you make retro adjustments on the timecard. This process transfers the information to the Project Accounting Interface Table. The Transfer to Project Accounting (retro) should be processed after the normal Project Accounting transfer process. This process looks for any summary timecard records that have any changed Project related information (such as project, task, rate, number of hours and hours type). The process then determines the difference between the original record and the current record and sends the necessary transactions to Project Accounting.

Glossary

A

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 Time Information A Oracle Time Management form used to assigned OTM assignment data.

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

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.

unless you make a new entry for an employee. See also: *Recurring 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*.

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

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

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.

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.

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*.

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.

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.

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