# Using Oracle Time Management™

**Release 11.i**
**A77086-01**

Using Oracle Time Management ™, Release 11.*i* (A77086-01)



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## Using Oracle Time Management ™ (A77086-01)

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# Preface

Welcome to Release 11.i of Using Oracle Time Management.

This guide contains the information you need to set up time and attendance tables. It describes in detail time keeping procedures, and provides you with helpful tips on using the manual effectively.

This preface explains the organization of the guide, and introduces other useful sources of information.

## Audience For This Guide

This guide is a complete source of information about using Oracle Time Management. 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
- implementation teams and consultants
- Oracle HRMS system administrators

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

### Oracle Time Management Elements

Chapter 2 provides examples of the forms used to define elements for time entry earnings needed by Oracle Time Management .

### Table Setup and Maintenance

Chapter 3 presents step-by-step instructions for setting up and maintaining the time and attendance tables.

### Policy Setup

Chapter 4 describes setup of the policy tables, which help determine hierarchy and rates for pay calculation.

### Policy and People Assignment

Chapter 5 provides detailed examples of assigning the appropriate tables and policies to earning policies and people.

### Oracle Time Management Reports

Chapter 6 describes how to submit online reports, verify report data, and provides a brief description of the reports that can be generated from Oracle Time Management.

### Time Entry Procedures

Chapter 7 details timecard entry and exception data entry, and describes the process for autogenerating, validating, approving, and managing time data.

### Retro Adjustment Procedures

Chapter 8 details the Retro Time Adjustment procedures as well as the Retro Transfer to Project Accounting.

## 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 Time Management. We at Oracle Corporation 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 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 Oracle Time Management. It includes information for converting and integrating existing applications with Oracle Time Management and writing custom reports for Oracle Time Management.

### Oracle Time Management Implementation Guide

This guide provides information you need to successfully implement Oracle Time Management in your specific hardware and operating system software environment.

## 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 guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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CHAPTER

# 1

# 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 integrates with HRMS and supports the management of personnel time and attendance. This chapter introduces you to accessing Oracle Time Management and describes key components and special features of the 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 Batch Element Entry 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 can be entered directly into Oracle Time Management . However, Oracle Time Management also provides acceptance of time and attendance data from various input sources, including time clocks.

## 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.

## Variances

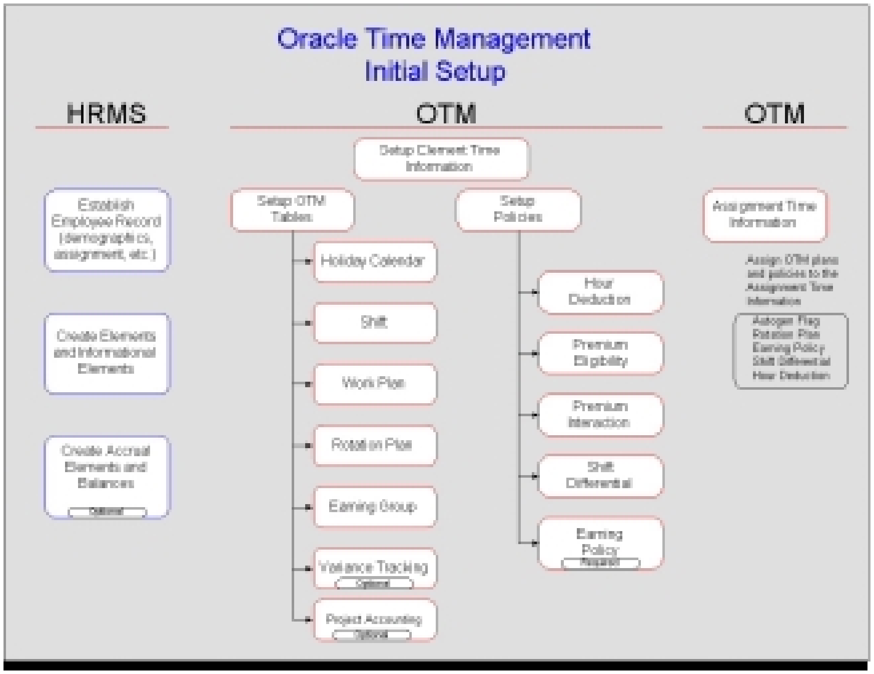
Oracle Time Management allows the setup of ranges in earnings, locations, and organizations, so that this information can be used to notify users that the maximum number of hours have been reached.

## 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

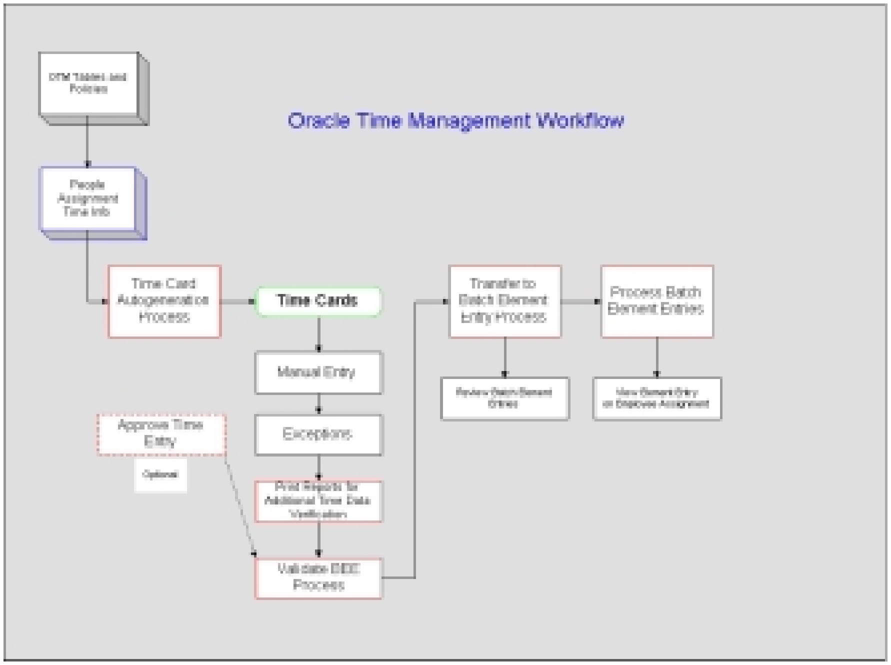
Before time is entered or received, the system has to be set up for time and attendance management. The following flowchart illustrates the progression of steps necessary to setting up in HRMS and Oracle Time Management .



## 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 Batch Element Entry (BEE), Oracle Project Accounting, and General Ledger.

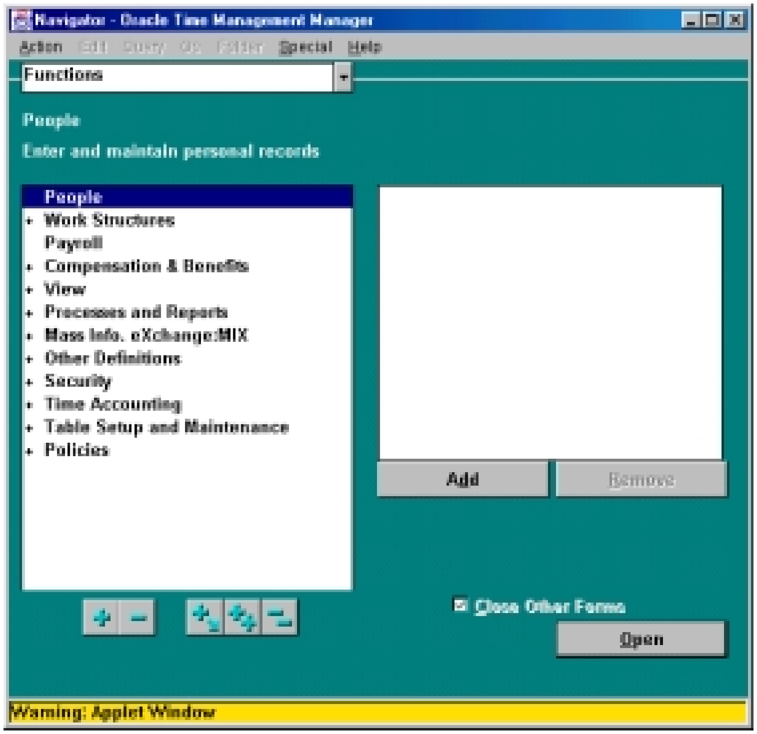
The flowchart below illustrates the entire workflow.



## 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. 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.

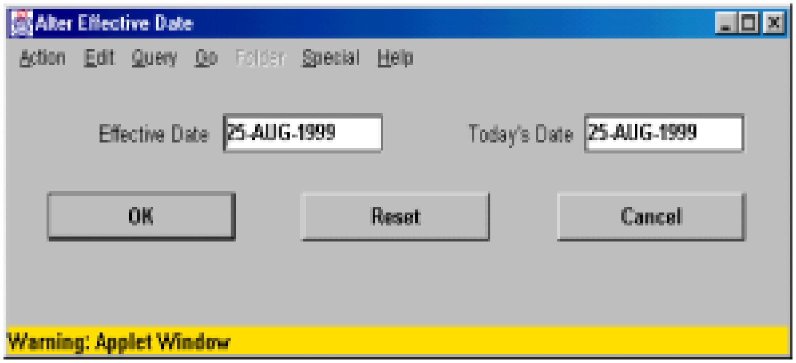
## Setting Your Effective Date

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.

**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.i Considerations

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

- The dependencies upon Oracle US Payroll were eliminated. Oracle HR is the only prerequisite for Oracle Time Management.

- Oracle Time Management is now supported by Batch Element Entry (BEE). This mechanism replaces PayMix and is used to transfer time accounting data.

## 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 BEE. These exceptions must be entered on the appropriate timecards.

CHAPTER

# 2

# Oracle Time Management Elements

Elements are essential compensation and benefit components that represent earning types, benefits such as pension plans, absences, expense reimbursements, and even tangible items given to a person, such as a computer. While elements may have already been generated or created, it is necessary for all elements which will be needed in Oracle Time Management to be defined.

This chapter includes the steps for defining the Oracle Time Management data required and the forms used in creating that data.

For detail information on entering elements, input values, and balance feeds, see the *Managing Compensation and Benefits Using Oracle HRMS*.

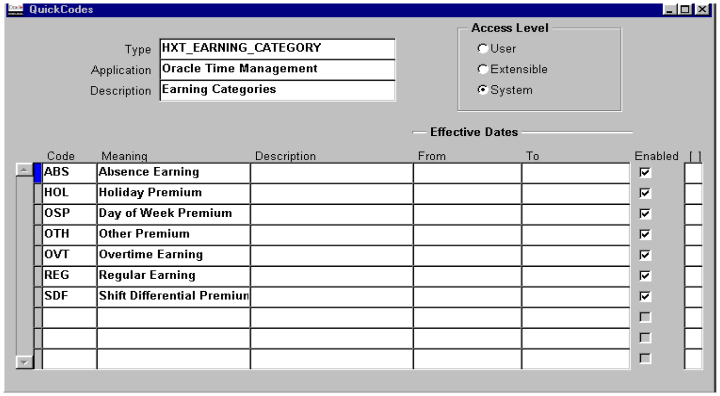
## Oracle Time Management Element Data Setup

Before an element can be used within Oracle Time Management, it must

1. Have the Earning Category defined on the QuickCodes Oracle Time Management table HXT_EARNING_CATEGORY.
2. Have previously been defined as an Element in Oracle HRMS.
3. Have been updated with the appropriate input values.
4. Have been entered as an element on the Element Time Information form.
5. Have been linked to the appropriate data on the Link form.

## Entering a Oracle Time Management Earning Category

All elements must be assigned to an earning category. The category must be entered and enabled on the HXT_EARNING_CATEGORY QuickCode form prior to being entered. The illustration below shows that the following HXT_EARNING CATEGORY Quick Codes have been established and the check box enabled.


QuickCodes

Type: HXT_EARNING_CATEGORY
Application: Oracle Time Management
Description: Earning Categories

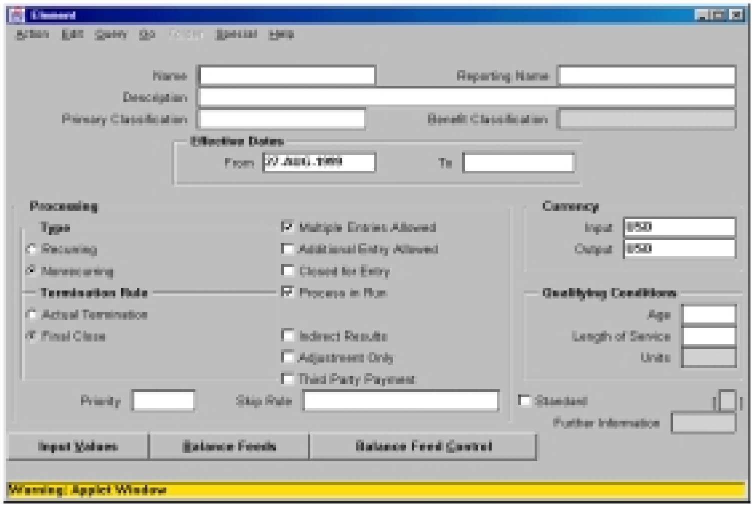
Access Level: User / Extensible / System (selected)

| Code | Meaning | Description | Effective Dates From | Effective Dates To | Enabled |
|---|---|---|---|---|---|
| ABS | Absence Earning | | | | ☑ |
| HOL | Holiday Premium | | | | ☑ |
| OSP | Day of Week Premium | | | | ☑ |
| OTH | Other Premium | | | | ☑ |
| OVT | Overtime Earning | | | | ☑ |
| REG | Regular Earning | | | | ☑ |
| SDF | Shift Differential Premiun | | | | ☑ |

## Setting Up Elements

Oracle Time Management requires that all hour-related elements be created so that the time entry elements may be sent to Batch Element Entry.

In order to successfully create the elements for use in the Oracle Time Management system you must create the element utilizing the Element Description form.



Once the Element data has been entered, you must establish the input values.  The data below illustrates what input values are required. For detail information regarding Input values, refer to the *Oracle Payroll U.S. User's Guide.*

*Hours* with Units = Hours in Decimal Format (2 places), Sequence = 1 User Enterable and Database Item checked.

*Pay Value* with Units = Money,  Sequence = 1 and Database Item checked.

*Multiple* (if applicable, usually for overtime, shifts and premiums) with the Units = Number, Sequence = 2, User Enterable and Database Item checked.

*Rate* with Units = Number,  Sequence = 3, with User Enterable and Database Item checked.

*Rate Code* with Units = Character, Sequence = 4, with User Enterable and Database Item checked.

*Jurisdiction* with Units = Character, Sequence = 5, with User Enterable checked,  Formula = Jurisdiction_Validation and Warning or Error = Error.

*Deduction Processing* with Unit = Character, Sequence = 6, with Required field and User Enterable checked, Default = All Deductions, Lookup = US_DEDUCTION_PROCESSING

*Separate Check* with Unit = Character, Sequence = 7, with Required and User Enterable checked, Default = NO, Lookup = YES_NO.

Once the element is created you must navigate to the Element Time Information selection and complete the Additional Element Information section of the window.

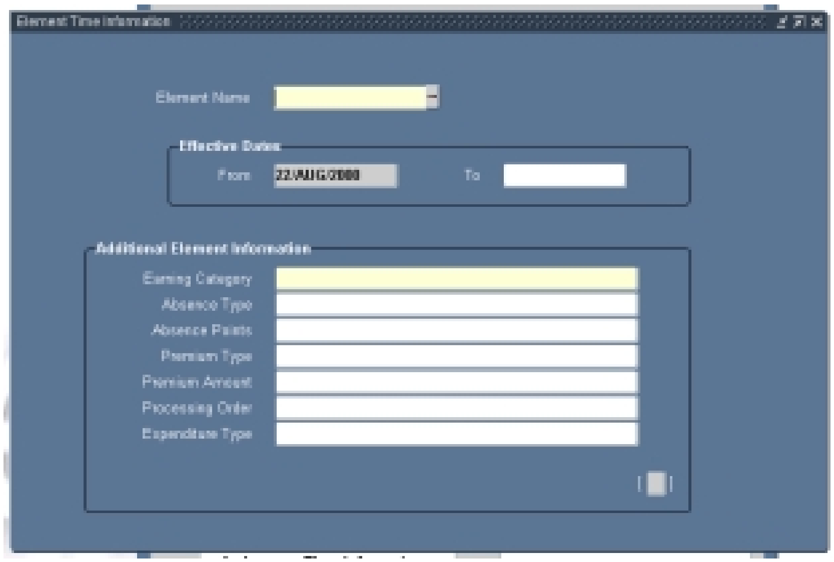
## Entering Element Time Information

Once the Element Time Information window is displayed, the element should be queried by entering the Element Name in the Element Name field.

Once the query is returned, the user should tab to the Additional Element Information portion of the form and select the appropriate Earning Category from the List of Values. This is a required field and must be entered in order to use this element in Oracle Time Management.

Depending upon the Earning category selected, the remaining fields should be completed by selecting the appropriate data from the List of Values. (For example, if the element is an overtime pay element, the Factor/Multiple should be entered). The Premium Type determines whether the premium will be calculated as a rate per hour, a fixed rate per day or a factor/multiple. The Premium Type determines how the next segment, Premium Amount, is entered.

Processing Order, indicates the order in which the element will be processed using the Premium Interaction Policy.



**To enter the Element Time Information:**

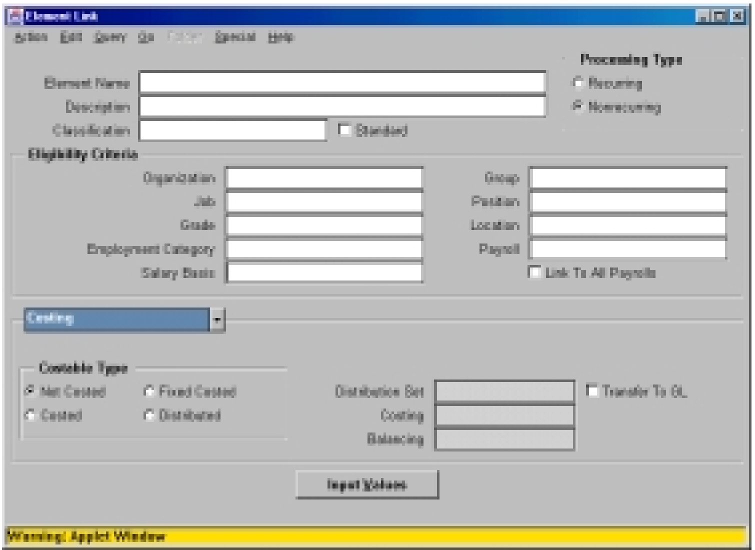
1. Open the Element Time Information window.
2. Query the Element Name.
3. Enter the appropriate Earning Category from the List of Values.
4. Select Absence Reason (if applicable) from the List of Values.
5. Enter the appropriate Absence Points (if applicable).
6. Select the Premium Type from the List of Values (if applicable).
7. Enter the appropriate Premium Amount (if applicable).
8. Enter the appropriate Processing Order. This field is required only when a Premium Interaction Policy applies to this element. It is recommended that the number be a whole number with increments of at least 10 between elements.
9. Select the appropriate Expenditure Type from the List of Values.

## Entering an Element Link

Element links determine which persons or groups of persons are eligible for elements.  For example, if the certain elements are only allowed for a specific payroll, that payroll can be selected on the Payroll field in the Eligibility Criteria region of the Element Link form.

The entry for Oracle Time Management  can be minimal because eligibility can be determined by the Premium Eligibility and Earning policies.  However, even if a premium exists on the Premium Eligibility Policy, a person will not receive it if is not linked on the Element Link form.

Enter all element links to complete the element entry process.




Once the element entry process is completed, the Oracle Time Management  tables and policies necessary for time entry can be set up.

CHAPTER

# 3

# Table Setup and Maintenance

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

## 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 Batch Element Entry.

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. The planning of all Oracle Time Management setups is an implementation issue and should be addressed at that time. See the *Oracle Time Management Implementation Guide* for specific instructions.

## 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 the Work Plan or Rotation Plan can be set up. The setup information is therefore presented accordingly.

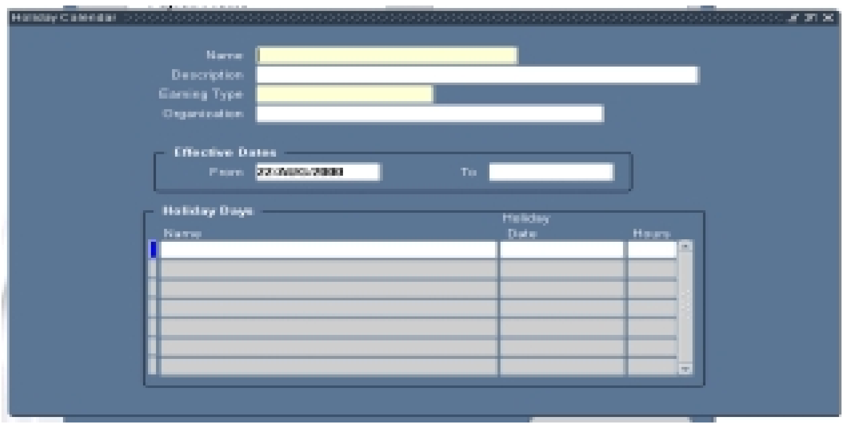
## Setting Up Holiday Calendars

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.

- 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 the Holiday Pay Earning Type from the List of Values.

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 the holiday. The number of hours entered should correspond to the number of paid hours, if applicable. Enter zero if the holiday is an unpaid holiday.

9. Enter the remaining holidays.

10. Save the data.

11. Close the window 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.

## 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.

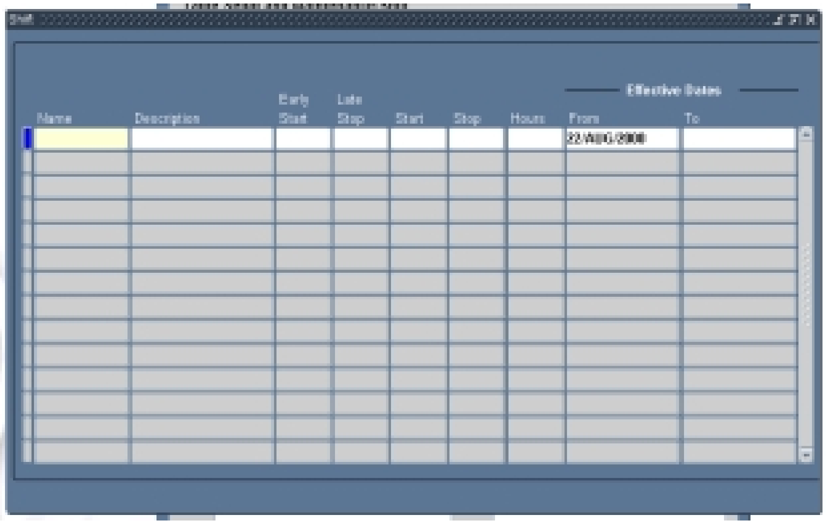
**To view an Expired Holiday Calendar:**

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 work schedules and can be created with Start and Stop times or with Hours. Shifts are used in the work plans, and work plans are used in the rotation plans. A person will be assigned to a rotation plan. Shifts must be created before work or rotation plans. NOTE: A shift with either start and stop time of 00:00 or with hours equal to .00 must be entered prior to creating a Work Plan. A shift can not be created with both start and stop time and hours.



## Creating an Off Shift

An Off shift must be created prior to establishing a Work Plan.  Use the Shift window to create an off shift.

**To create an off shift:**

1. Enter a name, such as “Off,” in the name field.

2. Enter a description of the Off shift in the Description field.

3. Leave the Early Start and Late Stop fields blank.

4. Enter either 00:00 in the Start and Stop fields, or enter .00 in the Hours field.  Either entry will indicate a non-work day.

5. After the Off shift is created you may enter all remaining shifts.

## 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 a 24-hour clock format in the Start field.
5. Enter the stop time for the shift in a 24-hour clock format in the Stop field.
6. OR enter hours (the length of the shift)
7. Continue steps 1 through 6 to add all desired shifts.
8. Save the data.

## 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.

## Viewing an Expired Shift

Use the Shift window to view an expired shift.

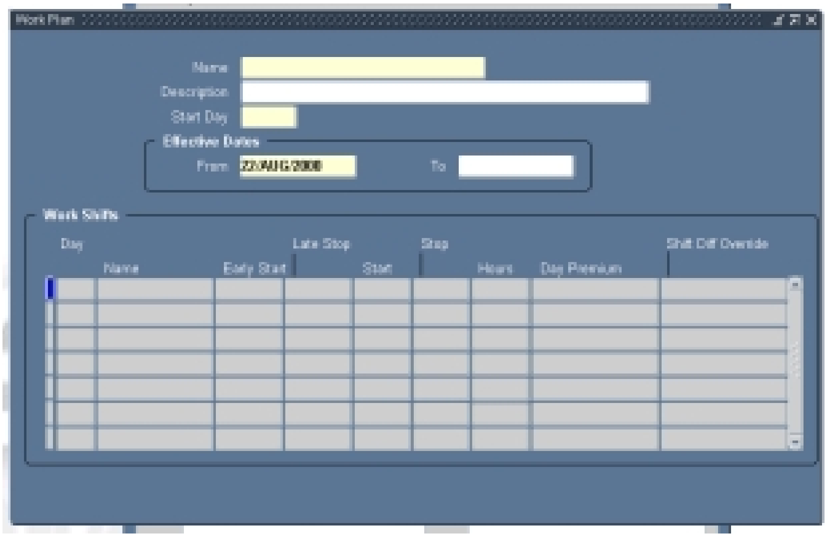
**To view an Expired Shift:**

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 Day Premiums and Shift Differential Overrides.



## 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 Start, Late Stop, Start and Stop times or hours 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.
9. Save the data.

## 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 from the List of Values. Continue to select all desired work plans.
3. Save the data.

## 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 it 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.

## Viewing an Expired Work Plan

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

**To view an Expired Work Plan:**

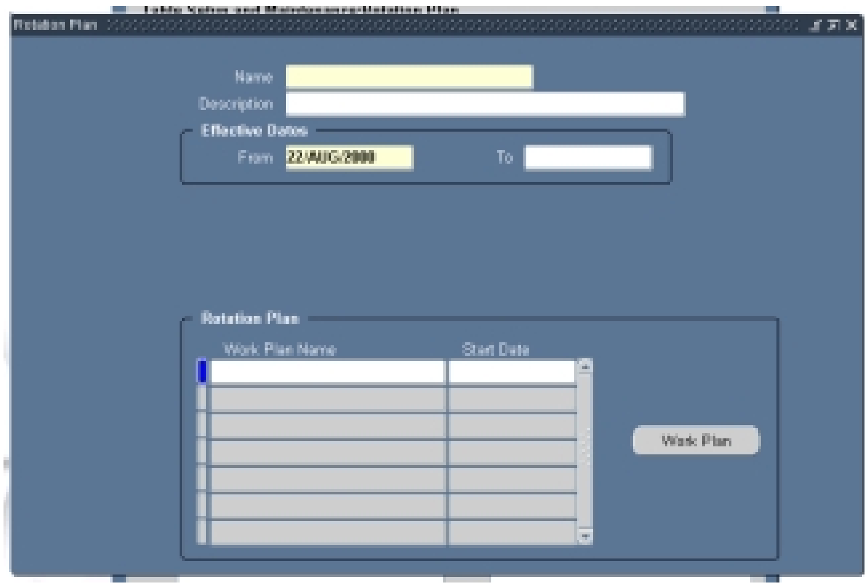
1. Change the effective date to beginning date of period you are interested in viewing prior to calendar end date.

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 moves 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 Day 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. Tab through the Effective Dates block to the Name field in the Rotation Plan block.
4. Select the appropriate work plan. If only one work plan is selected, that work plan stays in effect indefinitely.
5. Enter the Start Date of the work plan in the Start Date Field. This is the date in which the employee should start Working this Work Plan.
6. Continue selecting all needed work plans.
7. Save the data.

## Assigning a Rotation Plan to a Person

Use the Assignment Time Information window to assign a Rotation Plan to a person.

**To assign a Rotation Plan to a Person:**

1. Select Assignment Time Information from the Navigator list.

2. Query to find the person to whom you wish to assign a rotation plan by entering either the Assignment Number or Full Name.

3. The system will return the Assignment Number and Full Name from the data queried.

4. Tab to the Additional Assignment Information portion of the window.

5. Tab to the Rotation Plan field.

6. Select the appropriate Rotation Plan from the List of Values.

7. Save the data.

## Removing an Assignment between a Rotation Plan and a Person

Use the Assignment Time Information Window to remove the assignment between a Rotation Plan and a Person.

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

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

1. Select Assignment Time Information from the Navigator list.
2. Query to find the person whose rotation plan assignment you wish to remove.
3. Select the new Rotation Plan from the List of Values.
4. Save the data.

## 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.

## Viewing an Expired Rotation Plan

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

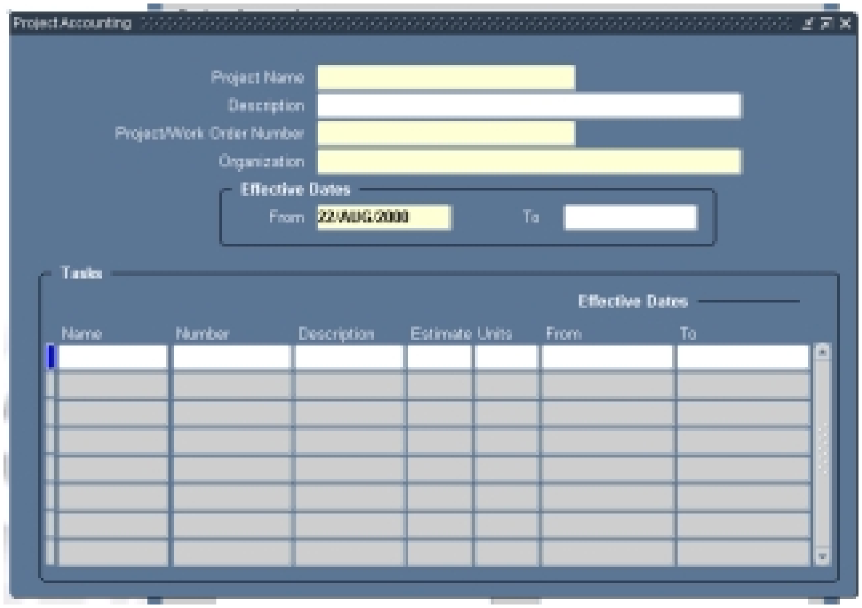
**To view an Expired Rotation Plan:**

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 Oracle Time Management Projects

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.

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 from the List of Values
5. 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.

## 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.

## Viewing an Expired Project

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

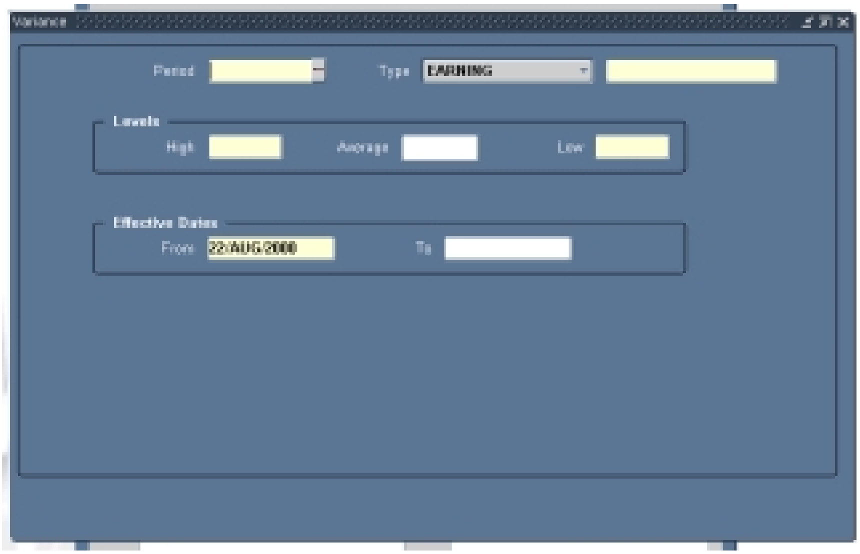
**To view an Expired Project:**

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 of hours per period, 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.

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

3. Select appropriate Earning Type from the List of Values.

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

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

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

7. Save the data.

## 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.

## Viewing an Expired Variance

Use the Variance window to view an expired variance.

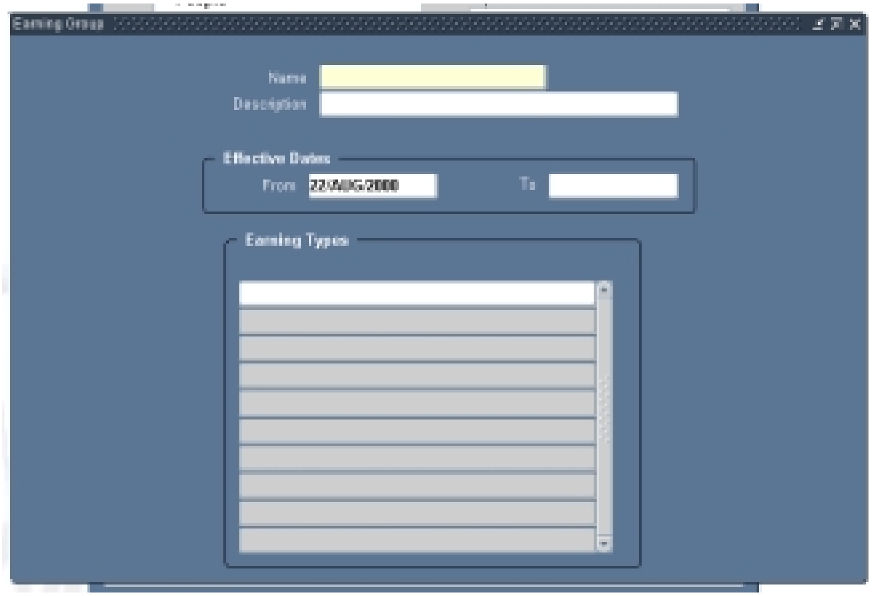
**To view an Expired Variance:**

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.

## 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.

## 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.

CHAPTER

# 4

# Policy Setup

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.

## Oracle Time Management Policies

Within 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 has an Hour Deduction Policy that subtracts a 1/2 hour meal, and two 15 minute breaks from his time. With the attached Hour Deduction Policy, the employee would have only 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.

In the previous section, you learned how to create and maintain a Holiday Calendar, the next step, assigning the Holiday Calendar to the Earning Policy, points to the central importance of the Earning Policy to the timekeeping process. Since the Earning Policy is assigned to a person, it is an index that contains all the time calculation rules that will be applied to that individual.

This section focuses on setting up all policies that end in assigning them and the Holiday Calendar 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

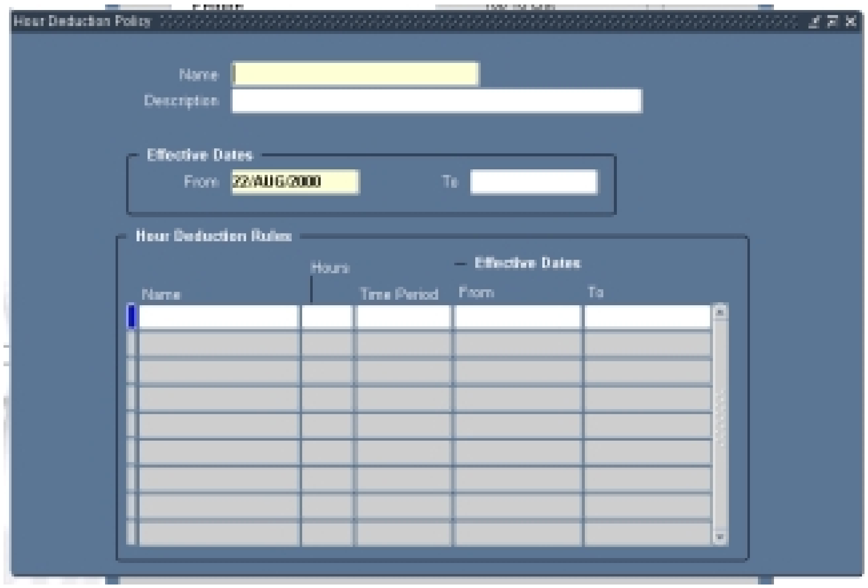
Prior to policy setup, or any Oracle Time Management entry, an inventory of your time information needs must be assessed, and preliminary policies should be laid out for review to ensure all areas have been provided for and also to avoid duplication. The planning of all Oracle Time Management setups is an implementation issue and should be addressed at that time. See the *Oracle Time Management Implementation Guide* for specific instructions.

## 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. The Hour Deduction policy is not a required entry unless deemed necessary by specific company requirements. The Hour Deduction policy is assigned to an employee and is not attached to any other policies or tables within the Oracle Time Management system.



## 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, it is common to deduct 15 minutes for breaks after 4 hours worked, and 30 minutes for lunch after 8 hours are worked; therefore, 4 hours would be entered for the Time Period for BREAK, and 8 hours would be entered for the Time Period for the MEAL.

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

8. Save the data.

## Assigning an Hour Deduction Policy to a Person

Use the Assignment Time Information window to assign an Hour Deduction Policy to a person.

**To assign an Hour Deduction Policy to a Person:**

1. Select the Assignment Time Information item from the Navigator.
2. Query the employee you wish to assign and Hour Deduction Policy.
3. Tab to the Hour Deduction field and select the appropriate Hour Deduction Policy from the List of Values.
4. Save the data.

## Removing an Assignment between an Hour Deduction Policy and a Person

Use the Assignment Time Information window 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. Select the Assignment Time Information item from the Navigator.
2. Query the person to whom you wish to assign an Hour Deduction Policy.
3. Select another Hour Deduction Policy from the List of values.
4. Save the data.

## Expiring an Hour Deduction Policy

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

**Note:** 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.

## Viewing an Expired Hour Deduction Policy

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

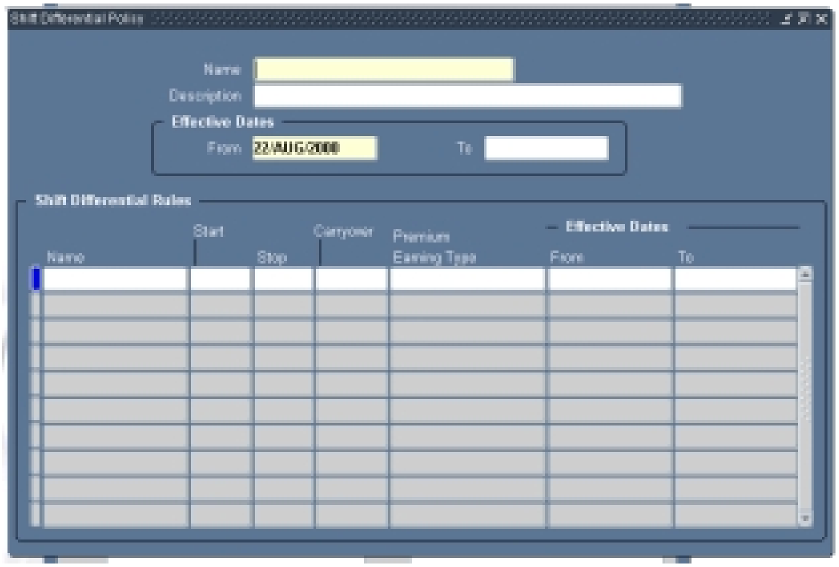
**To view an Expired Hour Deduction Policy:**

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 would be eligible to receive 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 for the shift differential. This premium must also be on the person's Premium Eligibility Policy.

9. Save the data.

## Assigning a Shift Differential Policy to a Person

Use the Assignment Time Information window to assign a Shift Differential policy to a person.

**To assign a Shift Differential policy to a person:**

1. Select the Assignment Time Information item from the Navigator.
2. Query the employee you wish to assign a Shift Differential Policy.
3. Select the appropriate Shift Differential Policy from the List of Values.
4. Save the data.

## Removing an Assignment between a Shift Differential Policy and a Person

Use the Assignment Time Information window 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. Select the Assignment Time Information item from the Navigator.
2. Query to find the person to whom you wish to remove the Shift Differential Policy.
3. Select the new Shift Differential Policy or delete the current policy.
4. Save the data.

## Expiring a Shift Differential Policy

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

**Note:** 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.

## Viewing an Expired Shift Differential Policy

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

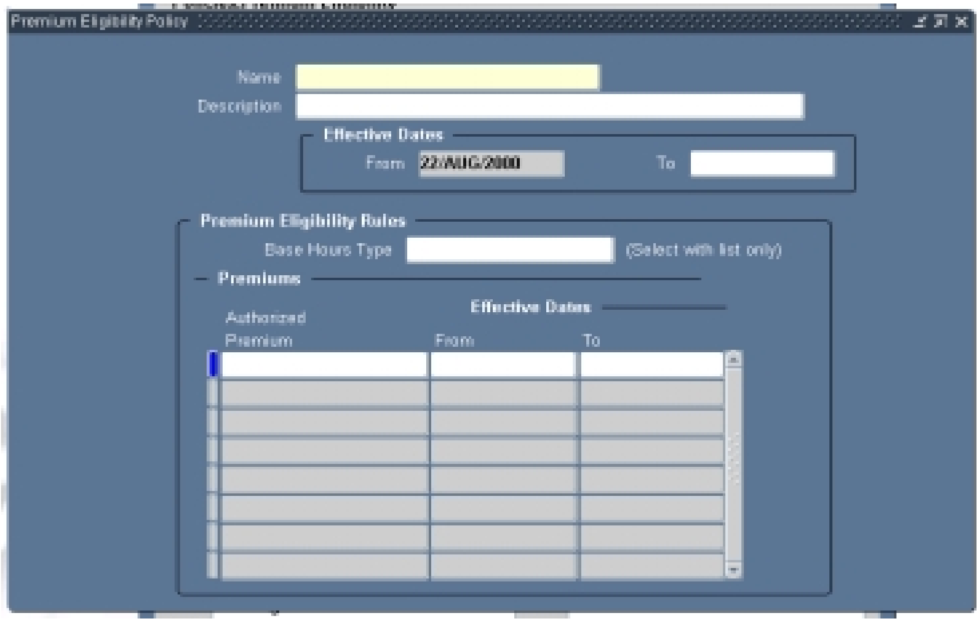
**To view an expired Shift Differential Policy:**

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 Base hours type on the 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 A Premium Eligibility Policy

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<br>Overtime_1.5 | Welding Premium<br>Danger Pay |
| Fork Lift Drivers | Regular | Work Hard Premium |
| Truck Drivers | Holiday Pay | 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 2, you learned that setting up informational 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 window 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. If multiple Base Hours type are required, save the data and cursor back tot he Base Hours Type field. Using the arrow down key, enter the next Base Hours Type and continue with steps 4-7.
9. Save data.

## 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 Premium Eligibility Policy.

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

4. Save the data.

## Expiring a Premium Eligibility Policy

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

**Note:** In Oracle Time Management 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.

## Viewing an Expired Premium Eligibility Policy

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

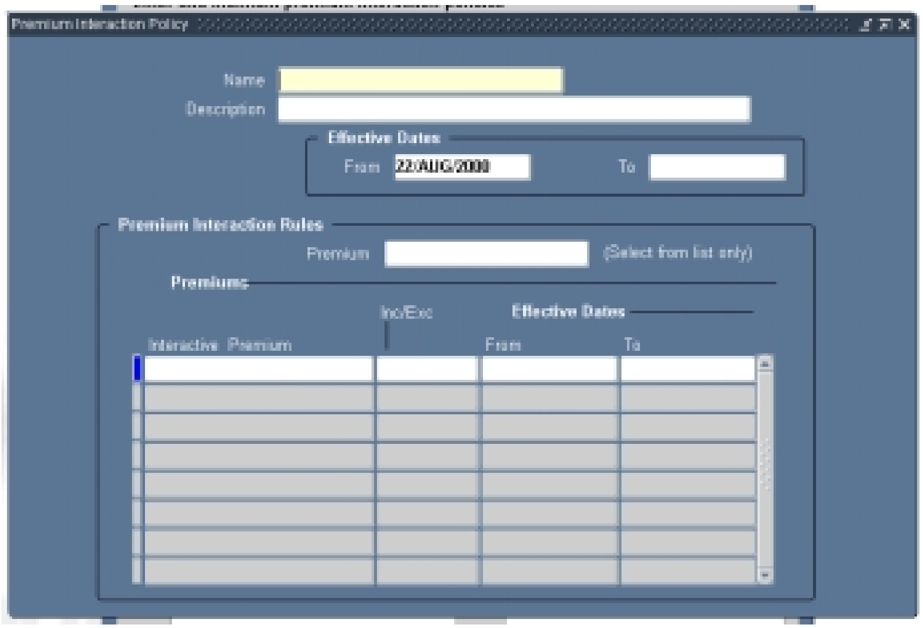
**To view an expired Premium Eligibility Policy:**

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 A Premium Interaction Policy

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

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 overtime pay such as second and third shift differential premium.

To illustrate:

Overtime Pay = processing order of 40

Second Shift Premium = processing order of 20

Person's Hourly Rate = $10

Overtime Pay = factor / multiple of 1.5

Second Shift Premium = fixed rate per hour $ .40

Third Shift Premium = fixed rate per hour $ .40

When the employee works overtime and receives either the Second or Third Shift Premium at $ .40 an hour, the employee will actually receive a rate of $ .60 per hour ($ .40 x 1.5 = $ .60)

## Creating a Premium Interaction Policy

Use the Premium Interaction Policy window 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 Premium 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. If multiple Premium Hours Types are to interact with various Authorized Premiums, save the data and enter another Premium by using the arrow down key to create a new line.
9. Continue entering all data following steps 4-8.
10. Save data.

## 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. Save the data.

## Expiring a Premium Interaction Policy

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

**Note:** Within 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.

## Viewing an Expired Premium Interaction Policy

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

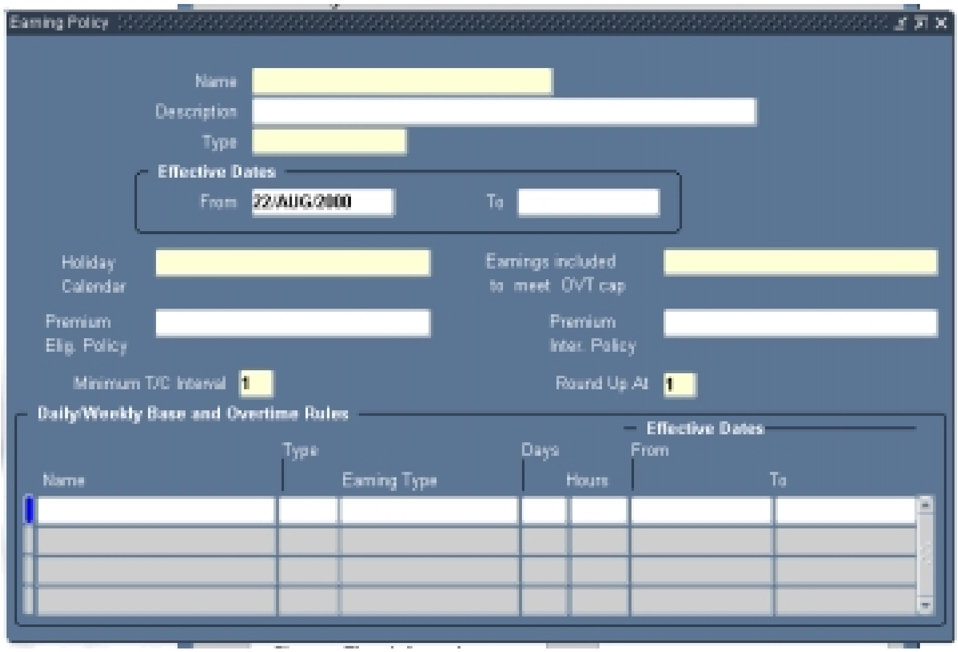
**To view an expired Premium Interaction Policy:**

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.

   **NOTE:** 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 Element Entries and retained in the database.

11. Tab to the Daily/Weekly Base and Overtime Rules block. Enter the rules in the following order. Daily, Weekly, and Special if all are applicable. An entry of HOL is also required. Again, if the TYPE of policy specified was Daily, then the only required entry within the Daily/Weekly Base and Overtime Rules block would be DAY and HOL. If you selected a TYPE of Weekly, then the only required entry would be WKL and HOL. If you selected a TYPE of Special, then the required entries would be DAY, WKL, and HOL.

12. Enter all applicable rules.

13. Save the data.

## Assigning an Earning Policy to a Person

Use the Assignment Time Information window to assign an earning policy to a person.

**To assign an earning policy to a person:**

1. Select the Assignment Time Information item from the Navigator list.
2. Query to find the person to whom you wish to assign an Earning Policy.
3. Select the appropriate the Earning Policy from the List of Values.
4. Save the data.

## Removing a Assignment between an Earning Policy and a Person

Use the Assignment Time Information window 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. Select the Assignment Time Information item from the Navigator.
2. Query to find the person whose Earning Policy you wish to change.
3. Select the new Earning Policy from the List of Values.
4. Save the data.

## Expiring an Earning Policy

Use the Earning Policy window to expire an earning policy.

**Note:** In 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.

## 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.

CHAPTER

# 5

# Policy and People Assignment

The previous chapter illustrated how the Earning Policy is a key component 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.

## Oracle Time Management Form Links

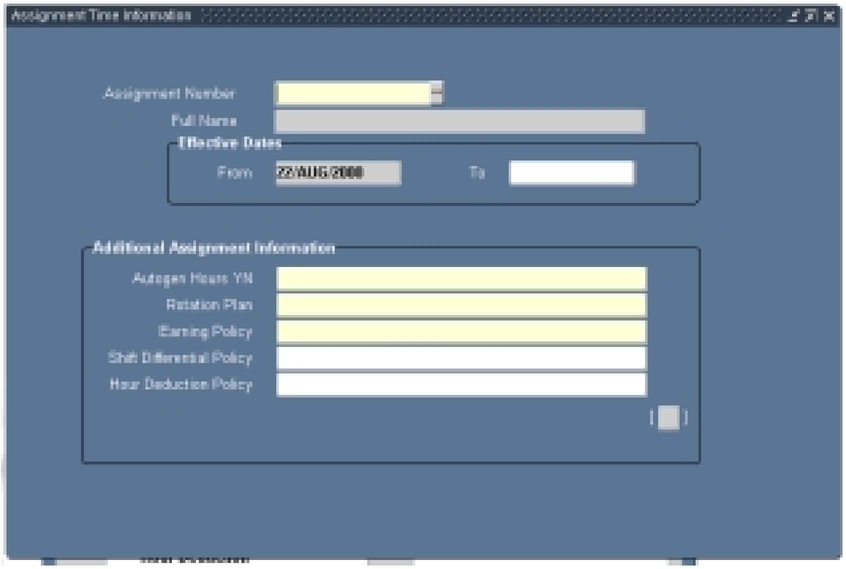
The table below lists the Direct (D) links between an Oracle Time Management table or policy and the form it is assigned to.  For example, the Holiday Calendar is assigned to the Earning Policy, and the Earning Policy is assigned to the Assignment Time Information window.

| FORM | ASSIGN-MENT TIME INFO | OTM EARNING POLICY | OTM WORK PLAN | OTM ROTATIO N 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 Assignment Time Information

To access the Assignment Time Information window for entry:

1. Select the Assignment Time Information item from the Navigator.
2. 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.
3. Select the applicable Rotation Plan from the List of Values for this person.
4. Select the appropriate Earning Policy from the List of Values.
5. If the person has an applicable Shift Differential Policy, select it from the List of Values.
6. Select any applicable Hour Deduction policy from the List of Values.
7. Save the data.




## Entering Additional Organization Information

To access the Additional Organization Information window:

1. Query on the Organization you are interested in.
2. Select the Others push button and the Additional Organization Information window will display.
3. Select Time Management Information from the list box and select OK.
4. Click in the field, and the Time Management Information window will display.
5. Select the appropriate Timecard Approver from the List of Values.
6. Timecard Approver entry has the following hierarchy; 1) Name entered in Supervisor field on Person window overrides all other names and is the only one to display in the List of Values. 2) Name entered on the Organizational level 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 close the window.

8. Save the data.

CHAPTER

# 6

# Oracle Time Management Reports

Once tables and policies have been set up, online reports may be run to display table and policy information.

Reports can also be run during the timecard entry process. This chapter describes the online reports available and details the process of submitting them, reviewing them online, and printing hard copies.

## Oracle Time Management Online Reports

The table below lists all the reports available in this release, and a brief description of each. These reports can be submitted through the Processes and Reports heading on the Navigator.

| REPORT TITLE | REPORT DESCRIPTION |
| --- | --- |
| Organization Variance Calc | Lists all organizations and their variances per each pay period |
| Location Variance Calculation | Lists all locations and their variances per each pay period |
| Earning Variance Calculation | Lists all organizations and their variances per each pay period |
| Earning Policy Table Listing | Lists all earning policies entered on the Earning Policy window |
| Hour Deduction Plcy Tbl List | Lists all hour deduction policies entered on the Hour Deduction window |
| Shift Diff. Pol. Table Listing | Lists all shift differential policies entered on the Shift Differential window. |
| Premium Elg Policy Tbl Lst | Lists all premium eligibility policies entered on the Premium Eligibility window |

| REPORT TITLE | REPORT DESCRIPTION |
|---|---|
| Prem. Interaction Plcy Tbl Lst | Lists all premium interaction policies entered on the Premium Interaction window |
| Holiday Calendar Table Report | Lists all holiday calendars entered on the Holiday Calendar window |
| Work Plan Table Listing | Lists all the work plans entered on the Work Plan window |
| Rotation Plan Table Listing | Lists all the rotation plans entered on the Rotation Plan window |
| Shift Table Listing | Lists all the shifts entered on the Shift window |
| Project Accounting Table List | Lists all the projects entered on the Project Accounting window |
| Variance Table Listing | List all the variances entered on the Variance window |
| Earning Group Table Listing | Lists all the earning groups entered on the Earning Group window |
| Total Table Entries | Lists totals for each of the tables above (HXT957A — HXT957G). |
| Person / Assignment Table List | Lists employees, their assignments, and their assignment effective dates |
| Actual and Rounded | Lists actual time entered on |

| REPORT TITLE | REPORT DESCRIPTION |
|---|---|
| Time Punch | Timecard form and rounded time based on Round Up At entered on Earning Policy. |
| Periodic Late Clock-In Report | Lists late clock in time by employee and calculates total hours the employee was late. |
| Missing Timecard Report | Lists missing timecards by employee. |
| Manual and Autogen Report | Lists separately manually entered timecards, timecards in error, and all timecards available for payroll and time period. |

## Submitting Reports

To submit a report from the Processes and Reports form.

**To submit reports:**

1. Select the Processes and Reports heading from the Navigator.
2. Select Submit Requests from the Navigator.
3. Select the Single Request Radio Button and depress OK.
4. Select the report from the List of Values.
5. Depending on the report, you may need to enter the correct parameters for the correct Period Type, Start Date, End Date.
6. Press Submit Request to start running the concurrent process.
7. Once the Request is complete, (status will indicate Completed) you may view the report.
8. To review the report click on the View Output button.
9. The Report window will display.
10. After review, close the Report Form.

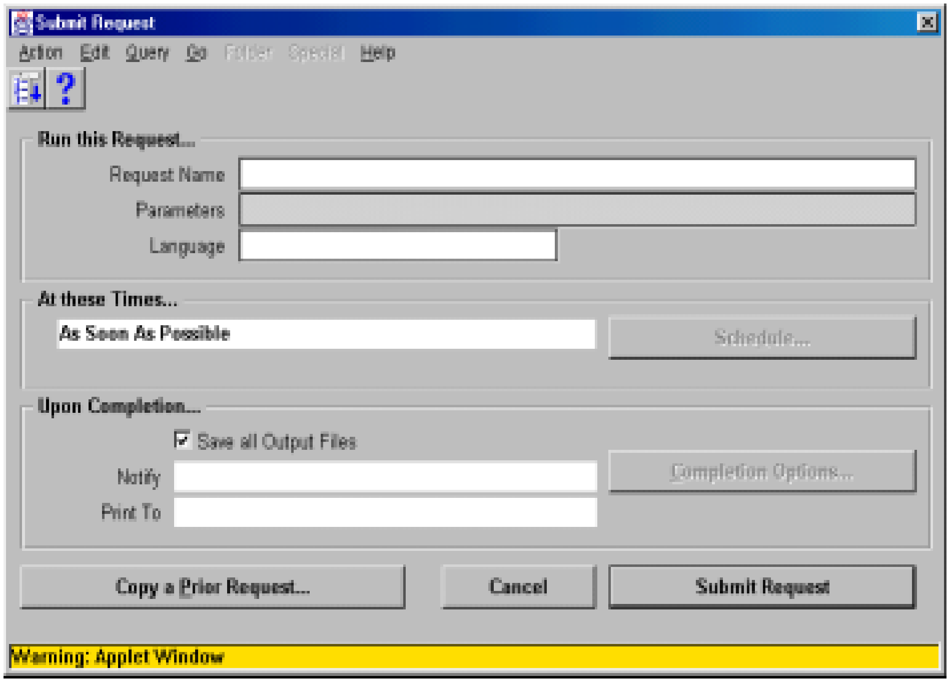
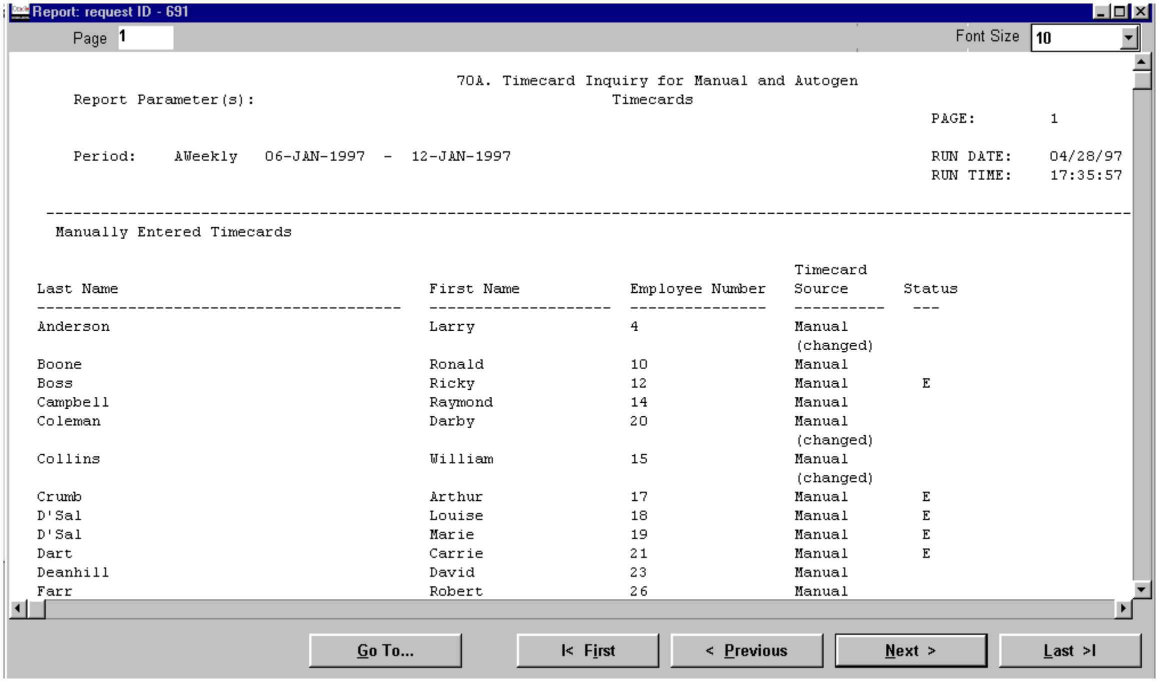

Submit Request
Action Edit Query Go Folder Special Help
Run this Request...
Request Name
Parameters
Language
At these Times...
As Soon As Possible
Schedule...
Upon Completion...
Save all Output Files
Notify
Print To
Completion Options...
Copy a Prior Request...
Cancel
Submit Request
Warning: Applet Window

**Figure 7 - 1**
**Manual and Autogen Report**




70A. Timecard Inquiry for Manual and Autogen Timecards

Report Parameter(s):

PAGE: 1

Period: AWeekly 06-JAN-1997 - 12-JAN-1997

RUN DATE: 04/28/97
RUN TIME: 17:35:57

Manually Entered Timecards

| Last Name | First Name | Employee Number | Timecard Source | Status |
|---|---|---|---|---|
| Anderson | Larry | 4 | Manual (changed) | |
| Boone | Ronald | 10 | Manual | |
| Boss | Ricky | 12 | Manual | E |
| Campbell | Raymond | 14 | Manual | |
| Coleman | Darby | 20 | Manual (changed) | |
| Collins | William | 15 | Manual (changed) | |
| Crumb | Arthur | 17 | Manual | E |
| D'Sal | Louise | 18 | Manual | E |
| D'Sal | Marie | 19 | Manual | E |
| Dart | Carrie | 21 | Manual | E |
| Deanhill | David | 23 | Manual | |
| Farr | Robert | 26 | Manual | |

CHAPTER

# 7

# Time Entry Procedures

This chapter presents a detailed description of time entry procedures from timecard autogeneration, to setting up a batch before manual time entry ,to manual time entry, and through submitting timecard batches to Element Entries. Time entry requires a thorough knowledge of batch processing procedures in HRMS as well as a complete prior setup of the tables, and policies in Oracle Time Management.

Also explained within this Chapter is the process for Transferring Project and Task Information to the Project Accounting Interface.

## Timecard Autogeneration

Timecard autogeneration should occur at the beginning of a Pay cycle. Use the Submit Requests window to autogenerate timecards.

**To autogenerate timecards:**

1. Select Processes and Reports the Submit Request from the Navigator.
2. Select the Single Request Radio Button and click OK.
3. Select Automatic Timecard Generation from the List of values for the Request Name.
4. Select the Payroll you wish to process from the List of Values.
5. Select the Time Period you wish to process from the List of Values.
6. Enter a Batch Reference if desired.
7. Depress OK and the Parameters window will close.
8. Submit the process by pressing the Submit Request button and close the form or choose another payroll and time period to process.

## Verifying Autogenerated Timecards

Use the Concurrent Requests Summary window to verify timecard autogeneration completed successfully.

**Note:** If autogeneration stays in a Pending status for an excessive amount of time (for several minutes), contact your technical support staff to ensure that Concurrent Manager is running.

**To verify timecards have autogenerated:**

1. Review your job(s) listed on the Concurrent Request Summary window list; verify Phase field displays Completed and Status field displays Normal. **Note:** If the Phase field displays Completed and the Status field displays Error, errors exist on your timecards, which must be corrected.

2. Close the form.

## Viewing Autogenerated Timecards

Use the Timecard window to view autogenerated timecards.

**To view autogenerated timecards:**

1. Open the Timecard window.

2. Query the Period End date and the Payroll in which you wish to view. The system brings up all records for that Payroll period and Payroll.

3. Check the Source Field (Autogen) timecards have been autogenerated.

4. If timecards are in Error, the Timecard Status field will display an “E” for each Timecard in Error.

## Correcting Autogenerated Timecards

Use the Timecard window to correct autogenerated timecards.

**To correct autogenerated timecards:**

1. Start a query in the Timecard window.

2. Query the Period End Date and Payroll in which you wish to correct timecards. The system brings up all records for that Payroll and Period End Date.

3. Check the Timecard Status field for an E (Error). Each Timecard with status E (Error) requires correction.

4. Cursor through each timecard of the pay period autogenerated looking for status E.

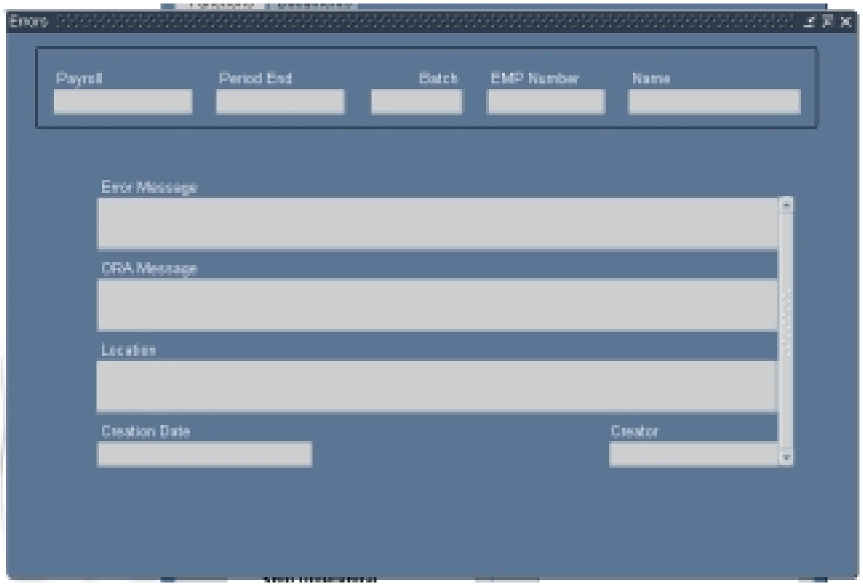
5. Verify the time entry data for each timecard in Error and make the appropriate changes.

6. Save the data.

## Displaying Errors

There are two other sources for reviewing and discovering timecard errors: the Show Errors push button on the Timecard and the online report — Manual and Autogen Report. The Show Errors push button will display the error for that specific time card, and the Manual and Autogen report displays errors by Payroll and Pay Period selected in the parameters.

The Time Entry Error window is pictured below. To view this form, select if from the Navigator menu OR press the Show Errors button on the Timecard window.



## Setting Up Batches in Batch Element Entry (BEE)

Use the Batch Header window to create batches for manual time entry.

**Note:** Batches must be predefined before timecards can be manually entered.

**To create batches in Batch Element Entry:**

1. Select Batch Element Entry from the Navigator under the Mass Information ExChange branch.
2. Enter a name in the Batch Name field. This field is user defined.
3. Enter a Source in the Source field. This field is user defined and is optional.
4. Enter a Reference in the Reference field. This field is user defined and is optional.
5. Verify Batch Status radio button is set to Unprocessed.
6. Save data.

## Entering Timecards

Use the Timecard window to enter timecards.

**Note:** Batches must be defined in Batch Element Entry for all manually entered timecards.

**To manually enter a timecard:**

1. Select desired Payroll from the List of Values.

2. Select the Period End Date from the List of Values.

3. Select the Batch Name from the List of Values.

4. Select the Employee number from the List of Values. The system will populate the Full Name field when you make this selection.

5. OPTIONAL: Select the name of the person approving the timecard in the Approver field. If a name is selected in this field, the Date Approved field populates with a date and time stamp.

6. Enter the Total Number of Hours that will be entered on the timecard. This field must be entered.

7. The Effective From and To fields display only fields. With the two fields, users can track changes made to a timecard. The dates displayed will give the indication of what dates should be used in Date Tracking to view the changes made to the timecard.

8. Place the cursor in the first Date Worked field.

9. Enter the first date worked or select it from the List of Values. The system populates the DOW field with appropriate day of the week.

10. If multiple assignments exist, select the Assignment number of the employee from the List of Values. Otherwise, the system will automatically populate the assignment number.

11. Enter the number of hours the employee worked on that day, OR you may elect to enter the time IN and time Out fields. If In and Out times are entered the system will populate the number of hours base upon the entry. In and Out time must be entered in a 24-Clock format.

12. If you wish to override the default Hours Type, or enter an absence you may select the Hours Type from the List of Values.

13. To override the employees assigned Earning Policy tab to the Earning Policy field, and select the override Earning Policy from the List of values. If no override Earning Policy is selected, this field will display the assigned Earning Policy.

14. Place cursor in the Additional Information (Summary) block, tab to each field you desire to enter information in and enter the following:

    a) Amount – Enter the value for the override amount.

    b) Hourly Rate – Enter the values for the override Hourly Rate.

    c) Reason - Enter reason for absence or overtime from the List of Values. This field is informational only and will not be passed to Batch Element Entry.

    d) Cost Center - Enter cost center applicable for this transaction from the List of Values.

e) Project – Enter the Project applicable for this transaction from the List of Values. If utilizing the Oracle Project Accounting, the applicable Oracle Projects will be available from the List of Values. Otherwise, choose the applicable OTM Project Information.

f) Task - Enter name of this task from the List of Values. If utilizing the Oracle Project Accounting, a task can not be entered without first entering a Project.

g) Location - Enter the location worked from the List of Values. This is an override location.

h) Shift - Enter the shift this task applies to from the List of Values. This is an override shift.

i) Comments - Enter additional comments for this line item. Select Edit--Edit Field from the action bar to enter your comments in the Editor.

j) Multiple - Enter the value for the override multiple.

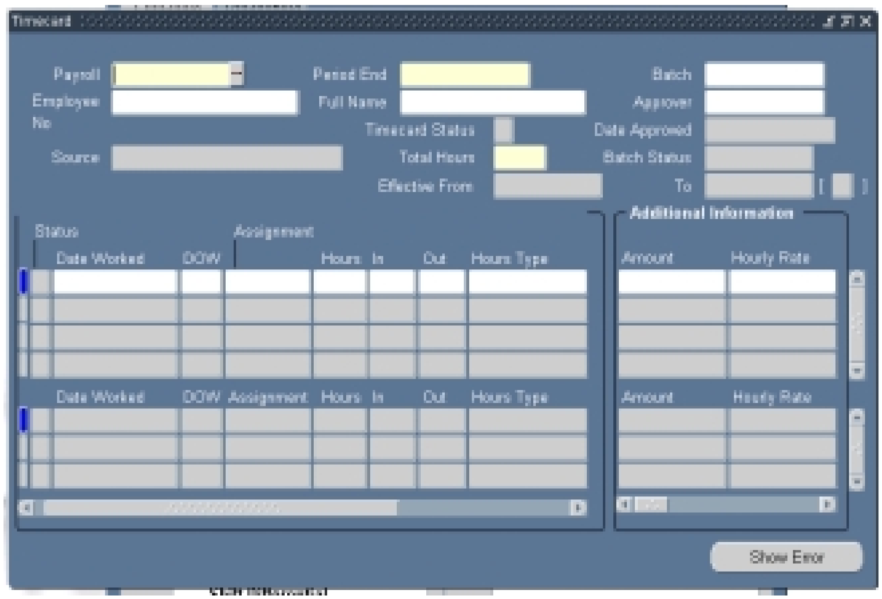
k) Tax Rule - Enter the applicable Tax Rule.

l) Separate Check--Click on this field to request a separate check for this transaction.

m) Wage Code – Future Use

15. Save the data.

16. Close the window or press the New Record icon to enter the next timecard.



## Timecard Exception Entry

After timecard have been autogenerated, it may be necessary to perform Exception Entry.  Again, because timecards have been autogenerated, the exception entry is usually very minimal.

Examples of exception entry may be PTO, Sick, and Vacation time.  An employee may have worked overtime hours and this information would need to be entered as an exception.

You enter exceptions as you would manually enter other timecards. Because you are entering exceptions, it becomes even more important to enter as much relevant information as you can in the Additional Information blocks.

**To Enter Exception Entry:**

1. Query the timecard using the Payroll, Period End Date and / or the Employee Number.
2. Enter the required exception entry on the timecard.
3. Save the data.

## Approving Timecards

Use the Timecard window to approve timecards. **Note:** Timecard approval is only required if it is a rule of your company.

**To approve timecards:**

1. Query the timecard(s) you wish to approve.

2. Place the cursor in the Approver field and select the approver name from the List of Values. The system populates the Date Approved field with the current date and time stamp once approver is selected.

3. Save the data.

## Validating Timecards For BEE

Validating timecards requires submitting and monitoring a concurrent job in Oracle Time Management . When the job is submitted, the timecards are validated for accuracy. Use the Submit Requests window to run The Validate timecards before transferring timecards to Batch Element Entry.

**To validate timecards:**

1. Select Processes and Reports then Submit Request from the Navigator.

2. Select the Single Request Radio Button and Depress OK.

3. Tab to the Request Name field and select **Validate for BEE** from the List of Values. The Parameters window displays.

4. Select the Starting Batch Name from the List of Values. This is the batch that you wish to validate.

5. If desired, select the Ending Batch name from the List of Values. This option allows you to validate multiple batches within one job. This field is optional.

6. If desired, select the Batch Reference from the List of Values. This field is optional.

7. Press OK to close the parameters window.

8. Click on Submit Request to start the Validate for BEE process.

## Transferring Timecards to BEE

Transferring the timecards to Batch Element Entry requires submitting and monitoring a batch job in Oracle Time Management . When the job is submitted, the validated timecards are transferred to the Batch Element Entry. Use the Submit Requests window to run the Transfer to BEE.

**To transfer timecards:**

1. Select Processes and Reports and Submit Request from the Navigator.
2. Select the Single Request Radio Button and depress OK.
3. Tab to the Request Name field and select **Transfer to BEE** from the List of Values. The Parameters window displays.
4. Enter the Process Date in the Process Date field. This date is the same as the Period End Date for the Batch of Timecard being transferred.
5. Select the Starting Batch Name from the List of Values. This is the batch that you wish to validate.
6. If desired, select the Ending Batch Name and the Batch Reference from the List of Values. These fields are optional.
7. Press OK to save the data and close the parameters window.
8. Click on Submit Request to start the Transfer process.

## Reviewing Validated/Transferred Timecards

Use the Batch Element Entry window to view Validated and Transferred timecards. **Note:** Check the batch job on the Concurrent Requests Summary window to verify job completed with a Normal Status.

**To review validated/transferred timecards:**

1. Select Mass Information Exchange from the Navigator.

2. Select Batch Element Entry from the expanded branch.

3. Query the batch you wish to review. The system will return the requested data.

4. Press the Lines button to view the detail data from the requested batch.

5. The Batch Lines window is displayed detailing the entries in the batch.

6. Close the window after the viewing.

## Submitting Timecards to Element Entries

Submitting timecards to Element Entries is the last step in the cycle of validating timecards, sending them to Element Entries. Use the Batch Element Entry window to process time entry to Element Entries.

**To submit timecards to Element Entries:**

1. Select Batch Element Entry from the Navigator.
2. Query the Batch you wish to transfer to Element Entries.
3. Depress the Process button on Batch Header window.
4. The Process Batch window will display.
5. Select the Transfer radio button and depress Start.
6. The Process Request message will display indicating your process was successfully submitted.
7. Close the Process Request message window.
8. Batch Header window will repopulate indicating the Batch Status as Transferred.
9. Close the form.

## Transferring to Project Accounting

Oracle Time Management allows you to track information by projects and tasks 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 the 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.

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

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 Element Entry cycle, (i.e. weekly, bi-weekly, etc.).

**To transfer timecard/project data to Project Accounting:**

1. Select Processes and Reports and Submit Process from the Navigator.
2. Select the Single Request Radio Button and depress OK.
3. Tab to the Request Name field and select Transfer to Project Accounting from the List of Values.
4. Enter the Payroll Name and Time Period from the List of Values.
5. Click Submit Request. The Transfer to Project Accounting process transfers the Project Information to the Project Accounting Interface Table.

CHAPTER

# 8

# Retro Adjustment Procedures

This chapter presents a detailed description of Retro Adjustments time entry procedures to include the Date Track capabilities for these adjustments. Also covered in this chapter are the procedures for submitting the Retro Adjustments to Element Entries, and Retro Adjustments to Project Accounting.

Retro Adjustments can be made to timecard once a timecard has been transferred to Element Entries and payment has been made. **Note:** Oracle Time Management does not support Retro Pay Adjustments, but does allow Retro Adjustments.

While this chapter takes you step-by-step into Retro Adjustment Time entry procedures, details descriptions of all the timecard fields can be found in Chapter 7 of this manual.

## Updating A Timecard for Retro Adjustment

Use either Timecard window to make retro adjustments to a timecard.

**Note:** Only timecards that have been previously transferred to Batch Element Entry (BEE), or Element Entries are available for the Retro Adjustment. The batch status cannot be in a Hold Status.

1. Start a query in the Timecard window.

2. Place the cursor in the Employee No field; enter the employee number for the person whose timecard you wish to correct and execute the query. The system will bring up the first timecard for this employee. Page through the timecard until the timecard for the applicable period end date comes into focus.

3. Make the necessary changes to the timecard (i.e. adding an additional 2 hours worked, changing a day worked to a vacation day, etc.).

4. The "Choose An Option" dialog will appear indicating an Update is in process.

5. Update the Total Hours field to indicate the changes made. Otherwise the system will populate a message indicating that the Hours are out of balance.

6. Save the changes.

7. Tab to the "Additional Information" block for the line item(s) changed and note the Retro Batch ID number. There will only be one Retro Batch ID created even if multiple changes are made to the timecard. This number will be the batch number required when validating the timecard and transferring the timecard to Batch Element Entry, and Element Entries.

## Validating Retro Adjusted Timecards

Validating the retro adjustments made on timecards requires submitting and monitoring a batch job within Oracle Time Management. When the job is submitted, the retro rows (updated rows) only , are validated for accuracy. Use the Submit Requests window to run the Validate for BEE (retro) job before transferring timecards to Batch Element Entry.

**To validate retro timecards:**

1. Select Processes and Reports and then Submit Request from the Navigator.

2. Select the Single Request Radio Button and depress OK.

3. Tab to the Request Name field and select Validate for BEE (retro) from the List of Values. The Parameters pop-up displays.

4. Select the Payroll Name for the Retro Batch from the List of Values. Enter the Process date which will be the Pay Period End Date for the payroll in which the Retro is being processed.

5. Enter the Retro Batch Number you wish to Validate. You may enter the Batch Reference. However, this field is optional.

6. Press Submit Request to start the Retro Validation.

## Transferring Retro Adjusted Timecards To BEE

Transferring the retro adjusted timecards to Batch Element Entry requires submitting and monitoring a batch job in Oracle Time Management . Use the Submit Requests window to run the Transfer to BEE.

**To transfer timecards:**

1. Select Processes and Reports and then Submit Request from the Navigator.
2. Select the Single Request Radio Button and depress OK.
3. Tab to the Request Name field and select Transfer to BEE (retro) from the List of Values. The Parameters window displays.
4. Enter the Process Date in the Process Date field. This date is the same as the Period End Date for the Batch of Timecard being transferred.
5. Select the Retro Batch Name from the List of Values. This is the retro batch that you wish to validate.
6. If desired, select the Batch Reference. This field is optional.
7. Press OK to save the data and close the parameters window.
8. Click on Submit Request to start the Transfer process.

## Submitting Retro Adjusted Timecards To Element Entries

Submitting retro adjusted timecards to Element Entries is the last step in the cycle of validating timecards, sending them to Element Entries. Use the Batch Element Entry window to process time entry to Element Entries.

**To submit timecards to Element Entries:**

1. Select Batch Element Entry from the Navigator.

2. Query the Retro Batch you wish to transfer to Element Entries.

3. Depress the Process button on Batch Header window.

4. The Process Batch window will display.

5. Select the Transfer radio button and depress Start.

6. The Process Request message will display indicating your process was successfully submitted.

7. Close the Process Request message window.

8. Batch Header window will repopulate indicating the Batch Status as Transferred.

## Project Accounting Retro

There is a separate process to transfer Retro 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 Validated for BEE (retro) and Transfer to Bee (retro) processes have been completed. This process looks for any summary timecard records that have any changed project related information (such as project, task, 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.

**To Transfer Retro Timecard changes to Project Accounting (retro):**

1. Select Processes and Reports and then Submit Request from the Navigator.
2. Select Single Request Radio button and depress OK.
3. Tab to the Request Name field and select Transfer to Project Accounting (retro) from the List of Values.
4. Enter the Payroll Name and Time Period and depress OK.
5. Click the Submit push button. The Transfer to Project Accounting (retro) process transfers the necessary Project information to the Project Accounting Interface Table.

# 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.

**Carryover** The amount of hours included a in shift differential Policy that the employee will receive payment.

**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.*

**Day Premium** A premium paid for employees who work on their scheduled days off.

# E

**Early Start** A period prior to the shift start time that is needed to allow employees working that shift to clock in. Therefore, no additional time is generated for people who clock in during this period.

**Early Stop** A period after the shift start time that is needed to allow employees working that shift to clock out. Therefore, no additional time is generated for people who clock out during this period.

**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** **D**efinition 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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