Oracle® Time & Labor

Implementation and User Guide

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Time & Labor Implementation and User Guide*.

See Related Documents on page xii for more Oracle Applications product information.

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Structure

1 **Oracle Time & Labor Implementation and User Guide**

2 **Oracle Time & Labor Elements**

3 **Time Management Structures**

Related Documents

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Oracle Time & Labor Implementation and User Guide

Oracle Time & Labor Overview

Oracle Time & Labor meets your time entry needs for employees and contractors for the entire e-business suite. Workers enter their own time which you can subject to an approval process according to your business rules. The time entries are then made available for retrieval by any of the applications that require this person's data. So there is a single point of time entry for use by multiple applications.

Workers enter their time through a configurable, web-based time entry screen, or using an offline spreadsheet that is later uploaded. The time data is stored in a central repository called the *time store*. The time store serves as a gatekeeper of data to all other Oracle applications.

Autogenerated Timecards

For some or all of your employees, you can autogenerate timecards, based on the holiday calendar and rotation plan to which they are assigned.

If you have implemented Oracle Project Resource Management, you can automatically populate timecards for your projects staff using assignment information from Project Resource Management.

Autogenerated timecards (also know as dynamic templates) can always be overridden, in the professional Forms interface, for exception entry.

Self Service Screens

You can limit the options available to users depending on how you set up their menus and preferences. Users can:

- Search for and view existing and previous timecards

- Create a new timecard, manually or using a template, and submit it for approval.

- Save a timecard as a template

- Export a template to a spreadsheet for disconnected entry and later upload.

- View and edit the preferences that you decide to make available to them.

Approvers can search for a group of timecards, view their status and comments in summary, and approve or reject.

Key Concepts

To implement Oracle Time & Labor, you need to understand the following key concepts:

Contingent Worker

The support of contingent workers within Oracle Time & Labor provides many benefits such as:

- Single source of time entry for all workers (people)
- Configurable timecard layouts
- Validation of time data from recipient applications

Application Set

For each worker you can define an application set preference to specify which applications are interested in that person's time entries. The application set can include Oracle Human Resources, Oracle Payroll, and Oracle Projects.

Time Entry Rules

When a worker saves their time entries, Oracle Time & Labor checks them against any rules you have defined, such as a limit on total hours. You can define different rules for each application.

Approval Process

For each application you can define which time data needs to be approved, which data changes require submission for approval, how frequently data is submitted for approval, and who approves it. The approver could be a named individual, the employee's supervisor, more than on person in a workflow, or any other files you define using a formula. You can specify simple data approval rules by selecting a set of time data that must always be approved, or you can specify more complex rules using formula.

Retrieval Rules

For each application, there are retrieval rules that specify which approval processes must be complete before that application can retrieve the data. You can select a group of retrieval rules to assign to people using preferences.

Timecard Configuration

Several timecard layouts are predefined:

- Projects Layout for Projects - only users
- Projects with Payroll Layout for Projects and HR/Payroll users
- Payroll Layout
- Exception Layout

You can configure these layouts or create your own to meet the requirements of each group of workers. For example, you can rearrange the columns, remove fields, and add new fields. Users can make some changes themselves by updating their preferences. For example, they can specify how many rows are displayed on the timecard.

You can configure lists of values on a timecard layout to limit the values that display and change their names. You can have different lists and different names for groups of users. You can also hide fields from the timecard and derive their data instead from entries in other fields. For example, you could derive expenditure type from the entry of an element.

You can change the informational text that appears on the self service screens to help you workers use the screens quickly and accurately.

Timecard Templates for Default Entries

Using templates speeds up timecard entry and reduces errors. You can provide users with one or more timecard templates so they can select the most appropriate template for the time they have to enter. There are three predefined templates:

- One displays the data entered in the previous timecard.

- For workers assigned to a rotation plan, there is a template displaying their normal time entries for the period (based on their rotation plan and holiday calendar).

- At sites that have implemented Oracle Projects Resource Management, there is a template displaying assignment information from Projects Resource Management.

You can create additional templates, for example, to display default holiday data.

Preferences

In Oracle Time & Labor you set preferences to define many of the rules about how individual workers or groups of workers can use the application. There are rules for the time store, such as which set of application can retrieve data about a worker's time, rules about self service timecard entry, such as whether the worker can enter a negative number of hours, and rules for Timekeeper.

You can create as many sets of preferences (called preference hierarchies) as you require. Then you link them to people by creating eligibility rules. You can link to locations, organizations, grade, jobs, position, payrolls, all people, individual people, and segments of the People Group and Soft Coded key flexfields.

Time Management Structures

You can define a number of structures that specify the working patterns of your employees. The application uses this information to autogenerate timecard templates and to calculate premiums. The structures include:

- Holiday Calendar, which record the paid and unpaid holidays to be recognized for an employee group

- Shifts, which define periodic work schedules based on regular start and stop times

- Work Plans, which are the consolidation of shifts worked in a seven-day work week

- Rotation Plans, which identify the dates when an employee moves from one work plan to another

- Earnings Groups, which identify the earnings types included in the accumulation of hours for calculating overtime limits

Time Management Policies

You use time management policies to set up the rules governing time entry, autogeneration, and how time information is calculated. The policies are:

- Hour Deduction policy, which establishes how much time, if any, should be automatically deducted as unpaid time from the employee's recorded hours. For example, if a person clocks in and out over a 9 hour period and has an Hour Deduction policy, that subtracts a 1/2 hour meal, and two 15 minute breaks, he has worked a standard 8-hour day.

- Shift Differential policy, which sets up any premiums or differentials paid as a result of people working different shift.

- Premium Eligibility policy, which defines premiums associated with base hours for which a person or group of people may be eligible.

- Premium Interaction policy, which specifies dependency of one premium calculation to another and the order in which they should be processed.

- Earnings policy, which consolidates many of the structures and policies to generate the pay rules enforced for an assignment.

Although the policies define premiums a person is eligible to receive, this does not imply they will automatically receive them. Eligibility is based on time ranges, actual time worked, and applicable pay rules.

The following diagram shows how the structures and policies relate to each other and are assigned to employees.

Structure and Policy Relationship
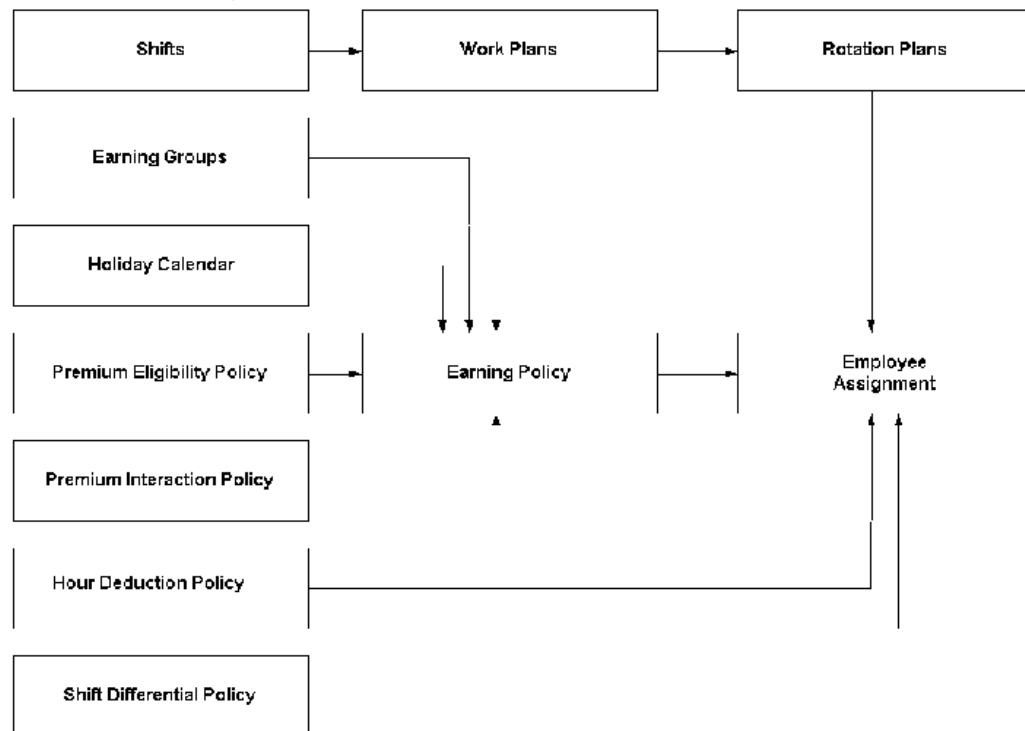
Getting Started with Oracle Time & Labor

This section give you the basic implementation steps required to quickly enable you to set up Oracle Time & Labor in a *test* environment. For information on running Oracle Time & Labor i a production environment, please see the detailed chapters in this implementation guide.

Quick Setup

The following steps depict the minimum items that must be present, either using existing defaults, or configuring and using new objects. Completing this quick setup will allow you to have a timecard that you can enter and submit on the *test system* you

have defined. After you complete this quick setup, you can test that the application is installed and working properly, and you can see where you want to make configuration changes to meet your specific needs.

This quick setup assumes that you are using the delivered Oracle Time & Labor menus, responsibilities, and security, and that you have these items in place. If you have Oracle HRMS already installed, many of these items already exist. The minimum items that need to exist prior to installing Oracle Time & Labor are:

• Set Up Sysadmin ID, *Implementing Oracle Time & Labor*

• Define Menus, *Implementing Oracle Time & Labor*

• Disable the Multiple Windows Features, *Implementing Oracle Time & Labor*

• Define Report Security Groups, *Implementing Oracle Time & Labor*

• Create Responsibilities, *Implementing Oracle Time & Labor*

You must have also:

• Installed Oracle Human Resources Release 11i with the most up-to-date patch according to the ReadMe file at the time of installation.

• If you are using Oracle Projects, installed Oracle Projects Release 11i with the most up-to-date patch according to the ReadMe file at the time of installation.

• Installed the latest version of the Oracle Application Framework according to the ReadMe file at the time of installation.

• Optionally, consulted two documents on MetaLink that give instructions and other useful information on setting up your environment:

• *Configuring and Troubleshooting Oracle HTTP Server with Oracle Applications*, note 139863.1

• *How to Implement Load Balancing Through Multiple Apache JServ Engines*, note 165700.1

How to use the Quick Setup Matrix

The Quick Setup Matrix is divided into several parts:

• Step

Each step mentioned in this matrix refers to the corresponding step in chapter 2, Implementation, in this guide. Please read this chapter before beginning the quick setup.

• Product Combination

The product combinations indicate the configuration of your installed Oracle products that you will use with Oracle Time & Labor.

• Tips

Pertinent information about the step appears here. If the system has a default in place, it is indicated.

Choose the product combination that matches your configuration, and perform the required steps for that product combination.

• *Oracle Applications Flexfields Guide*

Quick Setup Matrix

Step	Product Combination	Tips
Create Users, *Implementing Oracle Time & Labor*	Payroll HR Projects	You should define every user of the system with a unique user name and password. You can give the same responsibility to many different users, but any data changes will be identified by Application Username. See: Users Window, *Oracle Application System Administrator's Guide*
Set User Profile Options, *Implementing Oracle Time & Labor*	Payroll HR Projects	You must define the HR: Business Group profile option for every new responsibility. By default this option is set to the setup business group. If you wish to run the Approval Process in the foreground opposed to submitting the Background Workflow Process, set the OTL:Defer Approval Process on Timecard Submission to NO. You must also set the HR:Date-Track Enabled profile option to Yes at the application level. Set the HR:User Type profile option to HR with Payroll user for OTL responsibilities. See: User Profiles, *Customizing, Reporting, and System Administration in Oracle HRMS.* If you use Oracle Projects, refer to the appendix *Profile Options in Oracle Projects* in the Oracle Projects User Guide.
Set up Elements for Time and Labor Data Entry, *Implementing Orace Time & Labor*	Payroll HR	These elements must be nonrecurring, allowing multiple entries, and have one input value called Hours.
Link Time Related Elements, *Implementing Oracle Time & Labor*	Payroll HR	If you are going to create eligibility rules using Premium Eligibility and Earning Policies, make sure you element link rules do not conflict with you rpolicy rules. See: Defining Elements Links, *Managing Total Compensation Using Oracle HRMS*

Define Element Sets, *Implementing Oracle Time & Labor*	Payroll HR	If you have Oracle HR or Payroll and use the Payroll retrieval rules, you define element sets to specify the elements to be fed by Oracle Time & Labor. Select the type "Run" when you define the element set. See: Defining an Element or Distribution Set, *Configuring, Reporting, and System Administration in Oracle HRMS*
Run Generate Flexfield and Mapping Information Process, *Implementing Oracle Time & Labor*	Payroll HR Projects	You must run this process on initial set up, and run this process later if you change the HR key flexfields, the Projects Expenditure Items flexfield, the set of elements for which you are holding information in the time store, or the input values of these elements.
Review OTL Information Types Descriptive Flexfield, *Implementing Oracle Time & Labor*	Payroll HR Projects	You must review the OTL Information Types flexfield to ensure your flexfields and all elements created in the element sets are enabled and visible, and the element input values are displayed correctly. Ensure that there is at least one enabled segment for each context. Check that segments are correctly marked as required or optional.
Define Alternate Names, *Implementing Oracle Time & Labor*	Payroll HR	You do not define any alternate names for a field's list of values, the full list of elements from the element set used in the Generate Flexfield Mapping process displays by default. The Alternate Name set created is name {Element Set Name} - Enabled. See Defining Alternate Names: page 9-11
Define Preferences, *Implementing Oracle Time & Labor*	Payroll HR Projects	Default values exist. See Default Preferences, *Implementing Oracle Time & Labor*. If you use Oracle Projects, you must use the Projects Default Preferences. Create an eligibility rule for this branch.

Oracle Time & Labor Implementation Steps

This section provides a summary of what you can set up in each functional area in the sequence that you should follow. Every step gives you the names of any forms or processes that you should use for that step.

You can review the detailed task information for each step by following the page cross-references.

Setup steps are usually completed by a System Administrator after the successful installation and setup of Oracle Human Resources and Oracle Workflow.

Oracle Time & Labor supplies predefined data and functionality. You must configure this predefined data and functionality for your own implementation.

Web Browsers

We recommend you install the Internet Explorer version 5.5. However, you can also use Microsoft Internet Explorer version 4 or 5, or Netscape Navigator version 4.08.

You must ensure your browsers do not cache web pages and keep the cache size as small as possible.

Your browser must reload web pages on each access. To do this in Internet Explorer, set he cache to clear "Ever visit to the page" and the Amount of disk space to use, to 1MB. To do this in Netscape Navigator, set the cache to clear "Every Time" and the cache to zero.

Configuration Tools

You must use a set of tools to configure Oracle Time & Labor. The tools you need are:

- Oracle Applications, which you use to set up functions, menus, responsibilities, users, flexfields, time periods, element sets, web page instructions, and all the rules for time management, entry and approval.

- Oracle Workflow, which you use to configure workflow approvals, and enterprise email addresses.

- PL/SQL, which you can use, if necessary, to configure approval packages, retrieval packages, and create user accounts in a batch.

- Text Editor, which you can use to edit loader files to configure timecard layouts.

Basic Setup

The implementation steps are divided into three sections:

- Basic Setup, which covers workflow and security setup, including defining menus and responsibilities.

- Time & Labor Rules and Preferences, which includes setting up descriptive flexfields; defining time entry, approval, and retrieval rules; creating elements and mappings; customization deposit and retrieval processes, and configuring the timecards.

- Time Management Structures and Policies, which covers defining rotation plans, earning policies, and other time and labor rules for calculating pay.

If you are using...	Required Steps (no defaults)	Required Steps (with defaults)	Optional Steps
OTL with any other applications	Step 7, Step 8, Step 10	Step 2, Step 3, Step 4, Step 5, Step 6	Step 1, Step 9

Step 1: Replace the Default Oracle Logo *Optional Step*

Replace the Default Oracle Logo

Oracle Time & Labor delivers a default Oracle Logo in the upper left hand corner of the application. You can insert your own logo by replacing the file OTL_BRAND.GIF with your own. You should rename your file to OTL_BRAND.GIF in the /apps/media directory.

You may already have completed this step when implementing Self Service HRMS or another self service application.

See: Replacing the Default Oracle Logo, *Implementing Self Service HRMS*

Step 2: Set Up Sysadmin ID *Required Step*

Set Up Sysadmin ID

The Approvals process in OTL uses the default workflow error process to handle any errors in the processing. This error process sends a notification and description of the error to the Sysadmin ID.

Refer to the Oracle Workflow Guide for information on how to assign system administrator privileges to any user and how to set up email addresses in workflow.

Step 3: Set Up Workflow Background Process *Required Step*

Set up this process to take submitted timecards into the approval process.

Use the Submit Request window and a System Administrator responsibility.

Select the item type OTL Workflows for Employees, leave the threshold parameters blank, and select Yes in the Process Deferred, Process Timeout, and Process Stuck fields.

Run this process frequently during testing. In a production environment, you would normally run this process several times per day, but the frequency is dependent on other processes, the number of timecards that start the workflow process, when the approvals are acted on, and when retrievals take place.

Security

Step 4: Define Menus *Required Step*

A menu groups together a number of functions. Users' access to a menu depends on the responsibility you assign to them.

The predefined Self Service menus are:

- Time and Expense Self Service menu

- OTL Self Service Approval Menu

- OTL Worklist Timecard Approval

If you want to create your own self service menu, you must include the predefined submenu Self Service Time and Expense Application Menu, with no prompt. (The self service AK regions reference this menu.)

The Predefined professional forms menus are:

- Global OTL Administrator

- US OTL Administrator

- Global OTL Application Developer

- US OTL Application Developer

The Application Developer menus give access to all functions of the Administrator menus, plus the Deposit/Retrieval Processes (which includes retrieval rules and mappings).

If you want to rearrange these professional forms menus and add submenus for any new functions you have defined, create your own menus.

> **Caution:** Do not modify the default functions and menus supplied with the system. On upgrade these will be overwritten.

Use the Menu Window

See: Defining Menus, *Customizing, Reporting, and System Administration in Oracle HRMS*

Step 5: Disable the Multiple Windows Feature *Required Step*

In most Oracle Applications, you can open multiple windows from the Navigator window without closing the window you already have open. HRMS, however, does not support multiform functionality.

You must disable this feature on menus that access Oracle Time & Labor windows. You do this by adding the function Navigator: Disable Multiform (FND_FNDSCSGN_DISABLE_MULTIFORM) to a function type menu entry on the top-level menu.

Step 6: Define Report Security Groups *Required Step*

You can define the groups of standard reports and processes that a user can run from the Submit Request window. Every responsibility can have access to one report group.

Use the Request Groups window.

Step 7: Create Responsibilities *Required Step*

Create your responsibilities and assign a menu and report security group to them. If you use more than one business group you must set up separate responsibilities for each group.

You can exclude particular submenus or functions of the main menu to hide them from users of this responsibility.

The predefined responsibilities for professional forms are:

- Global OTL Administrator

- US OTL Administrator

- Global OTL Application Developer

- US OTL Application Developer

The predefined responsibilities for self service are:

- Self Service Time and Expenses (using the Time and Expense Self Service menu)
- Self Service Time (using the Time and Expense Self Service menu with menu exlusions)
- Self Service Expenses (using the Time and Expense Self Service menu with menu exclusion)
- Mass Timecard Approval (using the OTL Self Service Approval Menu)
- Worklist Timecard Approval (using the OTL Worklist Timecard Approval menu)

If you are creating your own self service responsibilities, and you do not use Oracle Internet Expenses, your responsibilities must include some menu exclusions. If you are using the predefined menu (Time and Expense Self Service menu), create three menu exclusions:

- Expenses Tab Bar
- Expenses Main Menu
- Expenses Global Menu

If you have created your own self service menu - including the predefined submenu Self Service Time and Expense Application Menu - create one menu exclusion:

- Expense Tab Bar

To create responsibilities for Self Service, select the Oracle Web Applications radio button in the Available From region.

Use the Responsibilities Window

See: Responsibilities Window, *Oracle Application System Administrator's Guide*

Step 8: Create Users *Required Step*

You should define every user of the system with a unique user name and password. You can give the same responsibility to many different users, but any data changes will be identified by the Application Username.

Use the User Window, or proceed to the next step to create a batch of user accounts. You must associate a person with each user that needs to be able to use the self service timecard.

See: User Window, *Oracle Application System Administrator's Guide*

Step 9: Configure Batch Creation of User Accounts *Optional Step*

There are a set of concurrent programs to automate the creation and management of large groups of user accounts. Before you can use the concurrent programs, however, you must write custom logic to set up your customary user name and password format, responsibilities and profile options you want to associate with a user. A user hook in the hr_user_acct_api is provided for you to do this.

See: Batch Creation of User Accounts, *Implementing Self Service HRMS*

Step 10: Set User Profile Options *Required Step*

You must define the HR:Business Group profile option for every new responsibility. By default this option is set to the setup business group.

You must also set the HR: DateTrack Enabled profile option to Yes at the application level. Set the HR:User Type profile option to HR with Payroll user for OTL responsibilities.

In addition, you may want to set other profile options for responsibilities or even for an individual user. The HXT_BATCH_SIZE profile option (which determines the number of timecard transferred to Batch Element Entries in a single batch) is set to 25 at site level by default.

To run the Defer Approval Process, set the OTL:Defer Approval Process on Timecard Submission profile option. OTL currently delivers this option with the value equal to YES. By changing the value of the profile option to NO, you will no longer need to submit the current process "Workflow Background Process".

> **Caution:** Please note, this is a benefit to enterprises with a limited amount of data.

Use the System Profile Values window.

See: User Profiles, *Customizing, Reporting, and System Administration in Oracle HRMS*.

If you use Oracle Projects, refer to the appendix *Profile Options in Oracle Projects* in the Oracle Projects User Guide.

Time & Labor Rules and Preferences

If you are using...	Required Steps (no defaults)	Required Steps (with defaults)	Optional Steps
OTL with Oracle HR and Payroll	Step 26, Step 27, Step 28, Step 29, Step 30, Step 35, Step 37*	Step 11, Step 12, Step 13, Step 14, Step 15, Step 17, Step 18, Step 19, Step 20, Step 25	Step 16, Step 21, Step 22, Step 23, Step 24, Step 31, Step 32, Step 33, Step 34, Step 36, Step 38
OTL with Projects	Step 29, Step 30, Step 37*	Step 11, Step 12, Step 13, Step 14, Step 15, Step 17, Step 18, Step 19, Step 20, Step 25	Step 16, Step 21, Step 22, Step 23, Step 24, Step 26, Step 27, Step 28, Step 31, Step 32, Step 33, Step 34, Step 35, Step 36, Step 38

Define Descriptive Flexfields

Oracle Time & Labor provides the following descriptive flexfields, which you might need to update if you are adding fields to the timecard layout or writing new formulas:

• OTL Information Types - Update this flexfield if you are adding to the timecard layout. You can add additional segments to existing context values or you can add new context values and associate segments to these values.

Running the Generate Flexfield and Mapping Information process creates contexts and segments in the flexfield automatically for the elements. HRMS key

flexfields, and Oracle Projects expenditure items information that you want to capture on the timecard.

- OTL Alternate Names - Update this flexfield if you are adding a field to the timecard layout and you want to configure the list of values for that field.

- OTL Formulas - Update this flexfield if you write a new formula for time entry or approval rules. Create a new context for each formula you write.

You use the Oracle Projects Expenditure Items flexfield to define additional flexfield information you want to display for all expenditure types, or for particular expenditure types or expenditure type classes. You transfer these definitions to Oracle Time & Labor using the Generate Flexfield Mapping Information process.

Step 11: Define Flexfield Value Sets *Required Step*

You define flexfield value sets to validate the values that a user can enter for any segment. The attributes of the value set control the type of values that can be entered, and how many characters each segment can hold. The attributes of the value set also control how the values are to be validated. Value set can be shared by different segments of the same flexfield, or by segments of any other flexfield.

Use the Value Set widow.

See: Defining Value Set, *Oracle Applications Flexfields Guide*

Step 12: Unprotect the OTL Formulas Descriptive Flexfield *Required Step*

If you are configuring the OTL Formulas descriptive flexfield, you must uncheck the Protect check box on the Descriptive Flexfields window.

Step 13: Define Descriptive Flexfield Segments *Required Step*

Define new context and segments to hold your new field or formula information. For example, to add a new formula to the OTL formula flexfield, define a context for the formula and a segment for each formula input.

You do not need to use a value set to validate a segment. If you do not specify a value set then a user can enter any alphanumeric value up to a limit of 150 characters.

Use the Descriptive Flexfield Segments window.

See: Defining Descriptive Flexfield Structures, *Oracle Applications Flexfields Guide*

Step 14: Define Flexfield Segment Values *Required Step*

You can choose to use Independent validation for a value set used by a descriptive flexfield segment. If so, you must define a list of valid values for the value set.

Use the Define Segment Values window.

See: Defining Segment Values, *Oracle Applications Flexfields Guide*

Step 15: Protect the OTL Formulas Descriptive Flexfield *Required Step*

If you configure the OTL Formulas flexfield, check the Protect check box in the Descriptive Flexfield window so it remains a protected flexfield.

Define Time Entry, Approval, and Retrieval Rules

Step 16: Write Formulas for Time Entry and Approval Rules *Optional Step*

You can define formula for time entry or approval rules. the predefined formulas are:

- Seeded Formula for Period Maximum

  (HXC_PERIOD_MAXIMUM), which checks that the number of hours worked in a particular time category does not exceed the specified limit per week (or other period) over a specified reference period (such as 14 days).

- Approval Assignment Status Test (HXC_APPROVAL_ASG_STATUS) which checks the assignment status of the employee at the end of the approval period against a value specified on the Time Entry Rules window. If the statuses do not match, the time entries must be approved.

- Approval Maximum Test (Seeded)

  (HXC_APPROVAL_MAXIMUM), which checks whether the number of hours worked in a particular time category within an application approval periods exceed a maximum entered in the Time Entry Rules window. If it does, the time entry must be approved.

- Assignment Standard Hours vs Time Category (Seeded Formula)

  (HXC_ASSG_STD_HRS_Comparison), which validates hours entered on the timecard within selected time categories against an assignment's standard hours. The rule uses the standard hours recorded for the employee's primary assignment.

- PTO Accrual Balance vs Absence (Seeded Formula)

  (HXC_PTO_ACCRUAL_Comparison), which compares the hours entered on the timecard which decrement the accrual balance as specified in the Accrual plan definition against the PTO Accrual balance.

- Period Hours vs Time Category (Seeded Formula)

  HXC_TIME_CATEGORY_Comparison), which validates hours entered on a timecard against the hours defined for a period.

- Override Approver WF Person Mechanism (Seeded Approval)

  (HXC_OVERRIDE_APPROVER_WF_PERSON), which is the override approval style in the default Projects preferences. It send timecards to the override approver selected on the Timecard entry page.

Step 17: Define Recurring Time Periods *Required Step*

You must define recurring time periods, which you can then select as approval periods and timecard periods.

The predefined recurring time periods is Weekly - Starts Sunday.

Step 18: Define Approval Periods *Required Step*

You must define an approval period for each application, selecting from the recurring periods: page 8-6. You can define more than one set if you need to use different approval periods for different groups of employees.

The predefined approval period is Weekly - Starts Sunday.

Step 19: Define Retrieval Rules *Required Step*

Retrieval rules define which recipient applications must approve time and labor data before a retrieval process can retrieve that data. There are several predefined retrieval rules for the Oracle Projects and BEE retrieval processes. See: Retrieval Rules: page 7-7

Review these rules; if they do not meet your requirements, you can create additional rules.

See: Defining Retrieval Rules: page 7-10

Step 20: Define Retrieval Rule Groups *Required Step*

You can group retrieval rules into groups and associate the groups with people using the Retrieval Rule Groups preference. The following retrieval rule groups are predefined:

- Projects Retrieval Rule Group - used in Projects Default Preferences

- Payroll Retrieval Rule Group

- Human Resources Retrieval Rule Group - used in Default Preferences

- Projects and Payroll Retrieval Rule Group

- Human Resources and Project Retrieval Rule Group

- Human Resources and Payroll Retrieval Rule Group

- HR, Payroll and Projects Retrieval Rule Group

If you created a new retrieval rule: page 7-10, you must create a retrieval rule group that includes it.

See: Defining Retrieval Rule Groups: page 7-11

Step 21: Define Time Categories *Optional Step*

You can create time categories for reporting or to identify the types of time to be assessed by time entry rules. Categories can comprise mapping components (such as elements or projects) and other categories.

Several categories are predefined (Premium Hours, Non-Worked Hours, Billable Hours, Non-Billable Hours, and Total1 through Total10). However, there are no components or subcategories defined for these - they act as placeholders for your own definitions.

See: Defining Time Categories: page 8-18

Step 22: Define Time Entry Rules *Optional Step*

You can define formula - based validation rules for time entry. You can also define approval rules that specify what data entry or changes require approval for each application. These rules can be based on a formula or a mapping (that is, a set of fields that must be approved when they are entered or updated).

Validation rules are associated with a time entry rule group (then linked to people by preferences) and approval rules are associated with an approval style.

Predefined time entry rules for approval:

- Payroll Data Approval Rule (associated with the Payroll Retrieval Process Mapping)

- Projects Data Approval Rule (associated with the Projects Retrieval Process Mapping)

There is also a predefined time entry rule for validation:

- Overlapping Time Entries (associated with the OTL Deposit Process mapping) - this rule uses a timecard's start and stop time entries to check whether each entry overlaps with another entry on this timecard, or an adjacent timecard period.

See: Defining Time Entry Rules: page 8-19

Step 23: Define Time Entry Rule Groups *Optional Step*

You must define time entry rule groups if you have defined time entry rules for validation. For each rule in the group, you specify an outcome: business message, warning, or error. You associate groups with people using preferences.

See Defining Time Entry Rule Groups: page 8-20

Step 24: Define Approval Workflow *Optional Step*

If you are specifying a workflow as the approval method for an application, you must define the workflow. There is a simple predefined workflow that can serve as a template for creating your own workflows for approval. The predefined workflow item type is HXCEMP. This item type contains one process called OTL_APPROVAL_SEEDED_WF.

See Workflow Approval Styles: page 8-23

Use Workflow Builder and set your access level to 100.

See: Configuring Workflow Objects, *Implementing Self Service HRMS*

Step 25: Define Approval Styles *Required Step*

Approval styles define the time entry rules and approval methods to use for each application. You can define as many approval styles as you require and link them to people using preferences.

See: Defining Approval Styles: page 8-26

The predefined approval styles are:

- OTL Auto Approve

- Projects Override Approver

For Oracle Projects, use the Auto Approve approval style, and set the PA: AutoApprove Timecards profile option to Yes if you want timecards to be approved automatically, and to No, if you want them to be approved by the HR Supervisor. You set this at the responsibility level for the System Administrator responsibility (or whichever responsibility is used to set the profile option) and it applies to all users. If you require other rules for Oracle Projects approvals, consider customizing they Oracle Projects AutoApproval client extension.

See: Using Oracle Projects Client Extensions: page B-6

Define Elements and Mappings

Step 26: Set Up Elements for Time & Labor Data Entry

If you use Oracle HRMS or Payroll, you must ensure you have defined all the elements that you will use for time and labor entry. These elements must be nonrecurring, allow multiple entries, and have one input value called Hours.

Use the Element window to define the elements (or the Earnings window if you are an Oracle Payroll user in the US or Canada).

If you are going to autogenerate values for these elements using time management structures and policies, the elements have additional required input values.

See: Setting Up Elements for Time & Labor Data Entry: page 4-4.

Step 27: Link Time Related Elements

Ensure you have linked all the elements that you will use for time and labor entry.

Use the Element Link window to link the elements.

> **Note:** If you are going to create eligibility rules using Premium Eligibility and Earning policies, make sure your element link rules do not conflict with your policy rules.

See: Defining Element Links, *Managing Total Compensation Using Oracle HRMS*

Step 28: Define Element Sets

If you have Oracle HR or Payroll and use the Payroll retrieval rules, you define element sets to specify the elements to be fed by Oracle Time & Labor. Select the type "Run" when you define the element set.

See: Defining an Element or Distribution Set, *Customizing, Reporting, and System Administration in Oracle HRMS*

Step 29: Run Generate Flexfield and Mapping Information Process *Required Step*

The Generate Flexfield and Mapping Information process creates context and segments in the OTL Information Types flexfield to hold the element, key flexfield, and projects information you want to store. It creates a context for each element and flexfield, and segment for each element input value and flexfield segment.

You must run this process on initial set up, and run this process later if you change the HR key flexfields, Projects Expenditure Items flexfield, set of elements for which you are holding information in the time store, or the input values of these elements.

See: Running the Generate Flexfield and Mapping Information Process: page 7-12

Step 30: Review OTL Information Types Flexfield Segments *Required Step*

You must review the OTL Information Types flexfield to ensure your flexfields and all elements created in the element sets are enabled and visible, and the element input values are displayed correctly. Ensure that there is at least one enabled segment for each context. Check that segments are correctly marked as required or optional.

See: Reviewing the OTL Information Types Segments: page 7-14

Customize Deposit or Retrieval

Step 31: Define Mapping Components *Optional Step*

If you added new contexts or segments to the OTL Information Types flexfields because you are adding or changing the information held in the time store or retrieved by recipient applications, you must perform this step. Otherwise, you can use the predefined mappings and mapping components.

See: Defining Mapping Components: page 7-3

Step 32: Defining Mapping *Optional Step*

If you defined new mapping components: page 7-3, you must update the predefined deposit mapping and /or define new retrieval mappings.

See: Defining Mappings: page 7-4

Step 33: Define Retrieval Process *Optional Step*

If you defined a new retrieval mapping, define a new retrieval process to use this mapping.

See: Defining Retrieval Processes: page 7-5

Step 34: Define Timecard Layouts *Optional Step*

If you choose to configure the predefined timecard layouts, you must perform this step. There are five types of layouts: for data entry, review, confirmation, and detail (corresponding to the web pages in the Self Service workflow), plus a layout for exporting data for disconnected entry.

See: Timecard Layouts: page 9-2

Configure Timecards

Step 35: Define Alternate Names

You can define alternate names to create user-friendly names in list of values on the timecard and to restrict the list of values available to groups of users. for example, you could use alternate names to hide a "Shift" element from workers who do not work on shifts. You can also use alternate names to derive the value of a field that is not displayed from a field that is displayed on the timecard.

> **Note:** You must create alternate names for the Element alternate names type if you use the Payroll or Exception layouts. You must create alternate names for Expenditure Element alternative names type if you use the Projects with Payroll layout. Associate these alternative names with the users of the layouts using the Timecard Alternate Names preference.

See: Defining Alternate Names To Configure Lists of Values: page 9-11

Step 36: Define and Enable Templates *Optional Step*

Templates store timecard data for reuse. By using templates, workers can concentrate on exception entry.

Dynamic templates are predefined. They pull data dynamically from work schedule information or Project resource Management, or the previous timecard. To enable workers to use the Work Schedule template, make sure they have:

- The *Autogen Hours* field set to Yes in the Assignment Time Information window for their assignments, and

- The preference *OTL Rules Evaluation* set to Yes, with HR or Payroll selected in the Approval Rules for Rules Evaluation segment of this preference.

See: Timecard Templates: page 9-7

Step 37: Define Preferences *Required Step*

By default, all employees receive default preferences. You can create new preference hierarchies and assign to individuals or groups of individuals.

If you use Oracle Projects, you must use the Projects Default Preferences. Create an eligibility rule for this branch.

To review the values in the Default Preferences and Projects Default Preferences, see: Default Preferences: page 10-4.

> **Note:** You must ensure each worker has a value for the following preferences: Application Set, Retrieval Rule Groups, and Timecard Alternate Names (for workers who use the predefined Payroll, Exception, or Projects with Payroll timecard layouts).
>
> You must ensure that the Retrieval Rule Group only references applications that appear in the Application Set, which means that you must create a new preference hierarchy for these to override the default preferences.

See: Defining Preferences: page 10-13

See: Defining Eligibility Criteria for Preferences: page 10-15

Step 38: Configure Instructions and Tips *Optional Step*

Instructions can be displayed within each region of the web page and describe a page's functionality. Each instruction is delivered with sample text.

You can configure instructions to include links to external web sites or to launch a secondary window containing helpful information for your users. You could include your rules or procedures a user may need to know.

Tips are displayed next to a field and give guidance to a user on what information they should enter in a field. A top is represented on screen by an icon.

Use the Messages window to configure instructions and tips.

See: Adding Instructions to Web Pages, *Implementing Self Service HRMS*

Time Management Structures and Policies

Complete the remaining steps if you are using time management structures and policies to autogenerate timecards for some or all of your workers.

If you are using...	Required Steps (no Defaults)	Required Steps (with defaults)	Optional Steps
OTL with Oracle HR Payroll	Step 39, Step 40, Step 41, Step 42, Step 43, Step 46, Step 51, Step 52	none	Step 44, Step 44, Step 47, Step 48, Step 49, Step 50, Step 53
OTL with Oracle Projects	not applicable	not applicable	not applicable

Step 39: Enter Element Time Information *Required Step*

For each element you are going to use for autogenerating values using time management structures and policies, define some additional information using the Element Time Information window. This information includes the earning category and any applicable premiums and expenditure type.

See: Entering Element Time Information: page 4-6

Step 40: Create Holiday Calendar *Required Step*

Define a holiday calendar:

- To automatically generate a detail time entry line item with the correct numbers of hours

- To validate hours taken are correct when a worker enters holidays manually

- In conjunction with the Earning Policy to pay premium time for employees working on holidays.

See: Creating a Holiday Calendar: page 5-9

Step 41: Create Shifts *Required Step*

Define shifts to specify the start and stop times of employee work schedules. Shifts form the basis of work plans, which in turn form the basis of rotation plans.

You must define an off shift with either start and stop times of 00:00, or with hours equal to 00 before you create a work plan.

See: Creating Shifts: page 5-11

Step 42: *Required Step*

Work plans identify applicable shifts for the seven days of the week. Work plans are used:

- In the autogeneration of hours for each person

- To form the basis of rotation plans

- For the calculation of day premiums and shift differential overrides

See: Creating a Work Plan: page 5-13

Step 43: Create Rotation Plans *Required Step*

Rotation plans indicate the dates on which a person moves from one work plan to another. You assign workers to a rotation plan, even if that rotation plan only has one work plan.

See: Creating a Rotation Plan: page 5-15

Step 44: Create OTL Projects *Optional Step*

If you do not use Oracle Projects, you can define projects within Oracle Time & Labor to input time and/or dollar estimates for tasks and work orders. You can track these projects by hours or by dollars using reports.

See: Creating and OTL Project: page 5-17

Step 45: Create Variances *Optional Step*

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

See: Defining a Variance: page 5-19

Step 46: Create Earning Groups *Required Step*

Earnings groups identify the earnings types you want to include in the accumulation of hours for calculating overtime limits (which are defined on the earning policy).

You can create multiple earnings groups for various groups of employees or to meet legislative requirements.

See: Creating an Earning Group: page 5-21

Step 47: Create Hour Deduction Policies *Optional Step*

Define an hour deduction policy if you need to deduct time automatically from an employee's recorded hours to cover meals and other unpaid breaks.

See: Creating an Hour Deduction Policy: page 6-9

Step 48: Create Shift Differential Policies *Optional Step*

Define shift differential policies to identify the shifts that qualify (based on their start and stop times) and the earnings types to be used for the shift differential premium.

See: Creating a Shift Differential Policy: page 6-11

Step 49: Create Premium Eligibility Policies *Optional Step*

A premium eligibility policy lists the authorized premiums associated with each base hours type. You must define at least one premium eligibility policy.

> **Note:** Although the policy defines premiums for which people are eligible, they will not automatically receive them. Eligibility is based on time ranges, actual time worked, and applicable pay rules.

See: Creating a Premium Eligibility Policy: page 6-13

Step 50: Create Premium Interaction Policies *Optional Step*

A premium interaction policy defines how a premium should be calculated based on other premiums and in what order they should be processed.

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, then you must create a premium interaction policy to indicate that one is to be applied to another. If you only have one authorized premium per base hours type on a premium eligibility policy, or if all of them apply only to a base hour, you do not need to create a premium interaction policy.

See: Creating a Premium Interaction Policy: page 6-15

Step 51: Create Earning Policies *Required Step*

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.

Define an earning policy for each of your enterprises' pay policies.

See: Creating an Earning Policy., page 4-10

Step 52: Enter Assignment Time Information *Required Step*

For all workers whose time you want to validate or generate using time management structures and policies, you must enter details in the Assignment Time Information window. Here, you assign people to a rotation plan, earning policy, shift differential policy, and hour deduction policy. You also specify whether their timecard should be autogenerated from this information.

See: Entering Assignment Time Information: page 11-2

Step 53: Review Timecard Validation Lookup *Optional Step*

When you enter absences through the professional forms Timecard window, you may see the following warning message: "APP_HXT_39260: Absence not part of PTO accrual plan associated with this assignment". If you want to suppress this message - for example, to speed up data entry - you can do so by updating the HXT Timecard Validation lookup type. The default tag value for the ABS_NOT_ASG_TO_ACRL, lookup is WRN. You can update it to SKIP, meaning that the validation is disabled.

The other lookups in this lookup type are for validation performed by the Validate for BEE process. You can set their tags to ERR, WRN, or SKIP in the same way.

See: Configuring the Validate for BEE Process: page 12-17

Use the Application Utilities Lookups window.

2

Oracle Time & Labor Elements

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.

Can Oracle Time & Labor use elements to hold time balances?

Oracle Time & Labor uses elements to hold time balances. The system uses regular elements to hold balances to pay workers for their normal hours worked, and you can define premium elements to hold balances to pay workers additional sums. You can define premium elements, absence elements, and shift elements in Oracle Time & Labor.

Can you define a pay rate for premium elements?

Yes, you can define a pay rate for all your premium elements. For example, you may wish to pay an overtime element at 1 1/2 the rate of pay, and pay Third Shift a flat rate of pay of 10 dollars above the normal rate. This is accomplished by entering these values on the Element Time Information window.

3

Time Management Structures

Time Management Structures

In Oracle Time & Labor, you can define time structures that, together, define the hours that you expect your workers to be working each week.

Can you define bi-weekly rotating work schedules for a group of workers?

Yes. The rotation plan controls the amount of time that a work plan is in use. Your employees are assigned to a rotation plan. This allows you to plan your workforce so that it is optimized. You can use the rotation plan to switch between multiple work schedules as often as you like.

Can you define shifts with in and out time as well as with standard hours?

You might wish to have shifts with start and stop times for various time of the day, to cover a 24 hour period. However, you may wish to define shifts to be only 8 hours without having workers note their time in and time out. Using the Shifts window, you can create varying shifts using both start and stop times, and with straight hours.

Time Management Structures

Time Management Structures Overview

In Oracle Time & Labor, you can define the following time structures that, together, define the hours that you expect your workers to be working each week:

- Holiday Calendars

  Holiday calendars allow the system to recognize paid and unpaid holidays. Holiday calendars are part of an *earning policy.*

- Shifts

  Shifts define the duration or time-in and time-out of work schedules. Shifts are a building block for work plans and must be defined first.

- Work plans

  Work plans identify applicable shifts for each of the seven days of the week. Work plans are a building block of rotation plans.

- Rotation plans

  Rotation plans identify the dates on which an employee moves from one work plan to another.

Notice that these structures are hierarchical, so you must define them in the order listed above.

In addition, you can define the following structures for reporting purposes:

- Project Accounts, which you use to input time and/or dollar estimates for tasks and work orders.

- Variances, which define low, average, and high levels of hours you expect to see recorded each period for a selected organization, location, or earning type.

- Earnings groups, which you use group earnings together for reporting purposes. You can also use earning groups to identify the earning types for which you accumulate hours to compare with weekly overtime limits you define on the earning policy.

Holiday Calendars

Holiday calendars are a special structure to hold information about your enterprise's policies for time off, both paid and unpaid You can have multiple holiday calendars; for instance, your policies might have different holidays depending upon the organization or location, or for closing down a facility for a holiday period.

Using a holiday calendar, you can:

- Determine paid and unpaid holidays. This is the only area in the system to record this information.

- Automatically generate (autogenerate) a detail time entry line item with the correct number of hours.

- Validate hours taken are correct. The application validates manual time entries 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.

You can add holidays to an existing holiday calendar at any time.

Holiday calendars are not assigned to a person, but rather to an earning policy, which in turn is assigned to a person.

Shifts

Shifts define work schedules. You might have several work shifts during the course of your business day or week. For instance, some operations have an early, a middle, and a late shift; some operations have a weekend shift. You can define as many shifts as needed.

You define shifts first, then use them in work plans, which, in turn, you can use in rotation plans. You assign people to a rotation plan.

Off shifts define the times when employees are *not working*, such as weekends. Off shifts do not have to be consecutive, such as Saturday and Sunday. Define an off shift as a shift with either start and stop time of 00:00 or with hours equal to .00. You must define an off shift before creating a work plan.

You can create shifts with Start and Stop times or with Hours, but not with both. Optionally, you can enter Early Start and Late Stop times. These are particularly useful for shifts where people clock in and clock out. You may require a period before the shift start time and after the shift stop time to allow all people working that shift to clock in and clock out. Therefore, the application does not generate additional time for people who clock in and clock out during these periods.

Work Plans

Work plans identify the shifts you plan to use to compose your work week. You create a work plan for each day of the week, including any days off. For instance, during a big project, your work plan might include early, midday, and late shifts Monday through Friday, and a midday shift Saturday and Sunday. Another week you might decide not to schedule so much activity on your work plan.

You can reuse existing work plans. As a strategy, some sites have developed a library of proven, tested work plans for periods of business ramp up (or down).

Using work plans, you can autogenerate hours for all the employees affected by the work plan. Work plans include information about the calculation of day premiums and shift differential overrides.

If your company pays a premium for those who have worked hours other than their regular shift, you can select the appropriate earning type for the Shift Differential Override. Shift differential may be entered in three places, on the timecard, on the work plan window, and on the shift differential policy. Oracle Time & Labor processes the shift differential premium in the same hierarchy.

A work plan is a component of a rotation plan, and so you must define work plans before rotation plans.

Rotation Plans

The rotation plan controls the amount of time that a work plan is in use. Your employees are assigned to a rotation plan. This allows you to plan your workforce so that it is optimized.

For instance, you might decide to have quarterly rotation plans which coincide with your business cycles. During your busiest season, your rotation plan might include a work plan with three daily shifts, seven days a week. During your "off" season, your rotation plan may reflect your decision to use your least ambitious work plan.

You can define as many rotation plans as needed

Autogeneration of hours and the calculation of day and shift differential override premiums use rotation and work plans.

Variance

A variance defines average, high, and low levels of hours per period, by organization, location, or earnings. You can use this information to notify users that the limits on the expected number of earnings hours have been reached.

For instance, if you have 10 employees working 40 hours a week, you would expect to see 400 hours of time reported. You can set up variances to alert you when this number is outside your expectations, such as 500 hours reported.

Variance tracking is an ideal use of triggers for an Oracle Alert. Management can be notified about possible excessive overtime use within an enterprise.

Earning Group

Use earning groups to identify those earning types you want to include in the accumulation of hours for calculating weekly overtime caps on the earning policy. When the limit is met for an earning group, the system creates overtime hours.

You can define multiple earning groups for various groups of employees. You select an earning group on an earning policy, and assign earning policies to employees.

Creating a Holiday Calendar

Oracle Time & Labor uses holiday calendars to:

- Determine paid and unpaid holidays. (This is the only area in the system to record this information.)

- Automatically generate (autogenerate) a detail time entry line item with the correct number of hours.

- Validate hours taken are correct. The application checks manual time entries 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.

Use the Holiday Calendar window to create a holiday calendar.

To create a holiday calendar:

1. Change the effective From date to the appropriate start date for the holiday calendar. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the calendar expires on a known date, you can enter it in the To field.

2. Enter the name of the calendar, and optionally enter a description.

3. Select the Holiday Pay Earning Type.

4. Select an Organization. This field is optional.

5. In the Holiday Days region, enter the first holiday in the Name field.

6. Enter the holiday date.

    This date 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, you enter July 5th.

7. Enter number of hours associated with the holiday. The number of hours should correspond to the number of paid hours. Enter zero if the holiday is an unpaid holiday.

8. Enter the remaining holidays.

9. Save your work.

Expiring a Holiday Calendar

Use the Holiday Calendar window to expire an existing holiday calendar.

> **Note:** Do not delete a holiday calendar unless you wish the record removed permanently from the application. Deleting a holiday calendar prevents an audit trail.

To expire a holiday calendar:

1. Query to find the holiday calendar you wish to expire.

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

3. Save your work.

    Viewing an Expired Holiday Calendar

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

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

    2. Query to find the expired holiday calendar you wish to view. The application returns the query with the expired holiday calendar.

Creating Shifts

Shifts define work schedules. Create shifts before work or rotation plans.

You can create shifts either with Start and Stop times or with Hours, but not both.

Note: You must create an "off" shift with either start and stop time of 00:00 or with hours equal to .00 before creating a work plan.

Use the Shift window to create or add shifts.

To create or add shifts:

1. Change the effective From date to the appropriate start date for the shift. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the shift expires on a known date, you can enter it in the To field.

2. Enter a short, definitive name for the shift.

3. Enter a concise description for the shift.

4. Optionally, enter the Early Start and Late Stop of the shift.

   If a person clocks in before the Early Start time, the application generates hours for that person based on the clock in time. However, if the person clocks in between the Early Start Time and the Shift Start Time, the application does not regard the extra minutes before the shift start time. Similarly, the application does not generate extra time for people clocking out between the Shift Stop Time and the Late Stop time.

5. Do *one* of the following:

   • Enter the start time for the shift in a 24-hour clock format in the Start field and the stop time for the shift in the Stop field.

   • Enter hours (the length of the shift).

6. Save your work.

Expiring a Shift

Use the Shift window to expire a shift.

Note: Do not delete a shift unless you wish to record removed permanently from the application. Deleting a shift prevents an audit trail.

To expire a shift:

1. Query to find the shift you wish to expire.

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

3. Save your work.

Viewing an Expired Shift:

Use the Shift window to view an expired shift.

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

2. Query to find the expired shift you wish to view. The application returns the query with the expired shift.

Creating a Work Plan

Work plans identify applicable shifts for each of the seven days of the week. You select at least one work plan when you create a rotation plan. Oracle Time & Labor uses work plans to:

- Autogenerate hours for each person
- Calculate day premiums and shift differential overrides

Use the Work Plan window.

To create a work plan:

1. Change the effective From date to the appropriate start date for the work plan. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the work plan expires on a known date, you can enter it in the To field.

2. Enter the name of the work plan, and optionally enter a description.

3. Enter the first day of the work week in the Start Day field.

4. In the Work Shifts region, select the appropriate shift. The Early Start, Late Stop, Start and Stop times or hours display for the shift you select.

5. Select a value for the Day Premium field if your enterprise pays a premium to people who work on their days "off". Select the type of premium that will apply to this particular day on this particular shift.

6. If your enterprise 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. A value in this field overrides any shift differential policy assigned to a person on the Assignment Time Information window.

7. Continue selecting all needed shifts.

8. Save your work.

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 removed permanently from the application. Deleting a work plan prevents an audit trail. You cannot expire a work plan if it is assigned to a rotation plan. You must expire the rotation plan prior to expiring the work plan.

To expire a work plan:

1. Query to find the work plan you wish to expire.

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

3. Save your work.

Viewing an Expired Work Plan

Use the work plan window to view an expired work plan

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

5. Query to find the expired work plan you wish to view. The application returns the query with the expired work plan.

Creating a Rotation Plan

Rotation plans indicate the dates on which a person moves from one work plan to another. You assign all people to a rotation plan, even if that rotation plan only has one work plan on it.

Oracle Time & Labor uses rotation plans in the autogeneration of hours and the calculation of day and shift differential override premiums.

Use the Rotation Plan window to create a rotation plan.

To create a rotation plan:

1. Change the effective From date to the appropriate start date for the rotation plan. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the rotation plan expires on a known date, you can enter it in the To field.

2. Enter the name of the rotation plan, and optionally enter a description.

3. In the Rotation Plan region, select the appropriate work plan to start the rotation plan.

4. Enter the Start Date of the work plan. This is the date on which employees should start working this work plan.

5. If you want to view the selected work plan, choose the Work Plan button. To return to the Rotation Plan window, choose the Rotation Plan button.

6. Select any other work plans required to set the pattern for the rotation plan and enter their start dates. For example, if the rotation plan contains two alternating work plans, select the two work plans and their first start dates.

   If you only select one work plan, this plan stays in effect indefinitely.

7. Save your work.

8. If you have entered at least two work plans, you can autogenerate the pattern you have set. Enter the next start date and the number of rotations. For example, to repeat the pattern ten more times starting on 1 March, enter that date in the Next Start Date field, and 10 in the Number of Rotations field.

9. Choose the Autogenerate button.

   If you make a mistake, you can choose the Delete All button to clear all the work plans from the window.

10. Save your work.

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 application. Deleting a rotation plan prevents an audit trail. You cannot expire a rotation plan if the plan is assigned to an employee.

To expire a rotation plan:

1. Query to find the rotation plan you wish to expire.

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

3. Save your work.

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

2. Query to find the expired rotation plan you wish to view. The application returns the query with the expired rotation plan.

Creating an OTL Project

If you **do not** use Oracle Projects, you can create basic project information using the Project Accounting window. You can enter time or money estimates against tasks, then track progress using reports. A manager can analyze the data for a specific period or for a range of dates to use in projections, forecasting, and alert notification.

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

To create a project:

1. Change the effective From date to the appropriate start date for the project. If the project ends on a known date, you can enter it in the To field.

2. Enter the name of the project and a brief description.

3. Enter the number for the project in the Project/Work Order Number field.

4. Select the organization associated with the project.

5. In the Tasks region, enter each task for the project on a separate line. You can enter a name, identifying number, and description.

6. Ensure that the effective From date for the task is on or after the From date for the project.

7. In the Estimate field, enter a value in hours or money, and in the Units field, select Hours or Dollars.

8. Save your work.

Expiring a Project

Use the Project Accounting window to expire an existing Project.

> **Note:** Do not delete a project unless you wish the record removed permanently from the application. Deleting a project prevents an audit trail.

To expire a project:

1. Query to find the project you wish to expire.

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

3. Save your work.

Viewing an Expired Projects:

Use the project accounting window to view an expired project.

To view an expired project

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

2. Query to find the expired project you wish to view. The application returns the query with the expired project.

Creating a Variance

You can define the average, high, and low levels of hours you expect to see recorded per period for an organization, location, or earnings type. Then you can use this information for variance reporting.

Use the Variance window.

To create a variance:

1. Change the effective From date to the appropriate start date for the variance. You cannot report on this variance before this start date. If the variance expires on a known date, you can enter it in the To field.

2. Select the Period for which you are defining average, low, and high levels.

3. Select a Type: Organization, Location, or Earnings.

4. Select the appropriate organization, location, or earning type.

5. In the High field, enter the highest number of base hours allowed within the period for the organization, location, or earning type you selected.

6. In the Average field, enter the average number of base hours allowed within the period for the organization, location, or earning type you selected.

7. In the Low field, enter the lowest number of base hours allowed within the period for the organization, location, or earning type you selected.

8. Save your work.

Expiring a Variance

Use the Variance window to expire an existing variance.

> **Note:** Do not delete a variance unless you wish the record removed permanently from the application. Deleting a variance prevents an audit trail.

To expire a variance:

1. Query to find the variance you wish to expire.

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

3. Save your work.

Viewing an Expired Variance:

Use the variance window to view an expired variance

To view an expired variance

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

2. Query to find the expired variance you wish to view. The application returns the query with the expired variance.

Creating an Earning Group

Use earning groups to identify those earning types you want to include in the accumulation of hours for calculating weekly overtime caps on the earning policy. You can also define earning groups for reporting purposes.

Use the Earning Group window.

To create an earning group:

1. Change the effective From date to the appropriate start date for the earning group. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the group expires on a known date, you can enter it in the To field.

2. Enter the name of earning group and optionally enter a description.

3. Select all earning types required.

4. Save your work.

Expiring an Earning Policy

Use the Earning Group window to expire an earning group.

> **Note:** Do not delete an Earning Group unless you wish the record removed permanently from the application.

To expire an earning group:

1. Query to find the earning group you wish to expire.

2. Query to find the expired earning group you wish to view. The application returns the query with the expired earning group.

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

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

3. Save your work.

4

Time Management Policies

Time Management Policies

You use policies to set up rules governing premium eligibility and autogeneration of time from work schedules.

Can you automatically deduct time from a workers timecard for meals and breaks?

Yes, using the Hour Deduction policy, you can automatically deduct time for meals and breaks after a defined number of hours have elapsed. Hour deduction policies normally apply to clock in/clock out setups, or when the total hours for the day are included on the timecard.

Using Time Management policies, can you automatically calculate overtime for a specified number of hours worked?

Earning policies 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 use in calculating pay. You can define the number of hours worked for regular pay, overtime pay and double time pay within the earning policy.

Oracle Time & Labor Policies

Oracle Time & Labor Policies Overview

Use policies to set up rules governing premium eligibility and autogeneration of time from work schedules. Oracle Time & Labor provides the following policies:

- **Shift differential policy**, which sets up any premiums or differentials paid as a result of people working different shifts. You assign a shift differential policy to relevant employees, but you can override it on the work plan or timecard.

- **Hour deduction policy**, which determines how much time is deducted from an employee's hours for meals and breaks. You assign an hour deduction policy to relevant employees.

- **Premium eligibility policy**, which defines a list of premiums associated with base hours that a person or group of people may be eligible to receive.

  Note: Although the policy defines premiums a person is eligible to receive, this does not imply they will automatically receive them. Eligibility is based on time ranges, actual time worked, and applicable pay rules.

  You associate a premium eligibility policy with an earning policy, which you assign to your workers.

- **Premium interaction policy**, which determines how a premium should be calculated based on other premiums, and in what order they should be processed.

  If you have more than one authorized premium per base hours type on a premium eligibility policy, and you will use one premium as a base for another, then you must create a premium interaction policy to indicate that one is to be applied to another. You associate a premium interaction policy with an earning policy, which you assign to your workers.

- **Earning policy**, which identifies the daily/weekly base and overtime rules, the holiday calendar, and the premium policies to be used in calculating pay. You assign an earning policy to your workers.

Hour Deduction Policy

You must create an hour deduction policy if your company automatically deducts time for a meal and breaks. Defining an hour deduction policy is optional within Oracle Time & Labor.

Hour deduction policies normally apply to clock in/clock out setups or when the total hours for the day are included on the timecard. Use these policies to define the amount of time to be subtracted from the hours used to make the paycheck.

Assign an hour deduction policy to an employee, directly. It is not attached to any other policies or structures within Oracle Time & Labor.

Shift Differential Policy

The shift differential policy defines premiums for those shifts that require a special rate of pay.

The shift differential policy identifies the shift differential start and stop time, and the earnings type to be used for the shift differential premium. Employees who are eligible and who work during the shift automatically receive the shift differential premium. An employee who receives normal pay for a shift would not have a shift differential policy assigned.

If an employee's work plan has a shift differential override defined for a shift, this value overrides the earnings type selected in the shift differential policy.

Premium Eligibility Policy

The premium eligibility policy defines a list of premiums associated with base hours that a person or group of people may be eligible to receive. For example, if a person has a premium eligibility policy with a base hours type of regular and an authorized premium of hazardous pay, then for each regular hour worked hazardous pay is included.

Although the policy defines premiums people are eligible to receive, this does not imply they will automatically receive them. Eligibility is based on time ranges, actual time worked, and applicable pay rules.

For example, an employee works his normal shift and receives Regular Pay for eight hours. However, if he works the second shift he may be eligible to receive a "second shift premium" that would pay an extra 25% of his hourly pay rate. The premium eligibility policy determines what premium an employee is paid for the specific hours worked.

You associate a premium eligibility policy with an earning policy, which you assign to your workers.

While the premium eligibility policy determines the premiums for which an employee may be eligible, it is the premium interaction policy that determines how premiums relate to each other.

Planning Premium Eligibility Policies

You must define a premium eligibility policy for each logical grouping of people, to avoid duplication and to assign premiums that are appropriate for specific sets of people. For example, you could group people by shifts, job functions, or work plans, and associate the appropriate premiums and base hour types with each group.

The following matrix illustrates one example that would require at least three premium eligibility policies, one for each people group:

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

Notice that workers must be eligible for the elements that represent the premiums on the policy or they will not receive those premiums. So check that your element links do not conflict with your policy setup.

Premium Interaction Policy

The premium interaction policy is key to determining how authorized premiums for a specific premium eligibility policy relate to each other.

A premium interaction policy determines how a premium should be calculated based on other premiums, and in what order they should be processed. The calculation for the premium interaction is dependent on whether the premium is included or excluded in the hourly base formula for the premium and the defined processing order for the elements. As an example, if a person is eligible for a premium and also for overtime, the system needs to know if the premium factor or rate is applied to a person's base rate only, or the base rate plus the overtime.

You define premium interaction policies only for premiums that are a factor or a rate, not a fixed amount.

Planning Premium Interaction Policies

If you have more than one authorized premium per base hours type on a premium eligibility policy, and you will use one premium as a base for another, then you must create a premium interaction policy to indicate that one is to be applied to another. If you only have one authorized premium per base hours type on a premium eligibility policy, or if all of them apply only to a base hour, you do not need to create a premium interaction policy.

To link a premium eligibility policy to a premium interaction policy, assign them both to the same earning policy.

If your premiums interact with each other (that is, 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 a regular pay, such as a welding premium and a high risk premium, and you require that one of the premiums is to be applied to the other rather than only to regular pay, the two premiums cannot have the same processing order. One must be higher than the other. It does not matter which one is higher, since a factor applied to a factor will give the same result no matter what order they are processed You select processing order in the Element Time Information window.

Premium Interaction Policy Example

Overtime Pay = processing order of 40

Second Shift Premium = processing order of 20

Hourly Rate = $10

Overtime Pay = factor/multiple of 1.5

Second Shift Premium = fixed rate per hour $0.40

Third Shift Premium = fixed rate per hour $0.40

When the employee works overtime and receives either the second or third shift premium at $0.40 an hour, the employee actually receives a rate of $0.60 per hour. ($0.40 x 1.5 = $0.60)

Before you enter a premium interaction policy, you should consider creating a matrix of your elements so that you can define which elements interact with other elements. You begin by listing all Regular Pay elements, then all of your premiums that

are factors/multiples. In the first column, list them in processing order. Across the top, list them in reverse order. For example:

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

Earning Policy

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 use in calculating pay.

Earning policies allow for the evaluation of overtime policies based on element points assigned to each individual element in which you assign element time information. The optional use of points in an earnings policy is enabled by a check box on the Earnings Policy. The default value for the check box is NULL to ensure compatibility with existing earnings policies. The points evaluation uses values assigned by you. The values assigned to each element returns a points total value for the daily rule and weekly rule within an earnings policy.

If time entries do not qualify for a special earning rule, or if the entries are not used, the points evaluation is used. The rule returning the highest number of points is used in the overtime evaluation. The points calculation evaluates each day entered on the timecard window that does not qualify for the special rule. Where points are not used in an earnings policy, the daily and weekly rule evaluates as the earning policy is defined.

You must define an earning policy for each of your organization's pay policies.

- Use Daily Overtime if you only need to define rules based on a day.

  For example, you want overtime paid for all hours worked in a day in excess of 8.

- Use Weekly Overtime if you only need to define rules based on a week.

  For example, you only pay overtime for hours in a week in excess of 40.

- Use Special Overtime 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, you pay overtime for hours in excess of 8 in a day AND 40 in a week. You would also select SPECIAL if you are subject to a double time rule--for example, when a person works more than 12 hours in a day, all hours over 12 are paid at double time overtime, and when a person works 7 days straight, the 7th day is paid as double time overtime.

You can also use the earning policy to record how you want time entry hours rounded up or down to standard intervals (such as 15 minutes).

Creating an Hour Deduction Policy

Use the Hour Deduction Policy window to create an hour deduction policy.

To create an Hour Deduction Policy:

1. Change the effective From date to the appropriate start date for the policy. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the policy expires on a known date, you can enter it in the To field.

2. Enter a name and optionally a description for the hour deduction policy.

3. If you want to restrict this policy to the current business group, clear the Global check box.

4. In the Hour Deduction Rules region, select Meal time deduction or Break time deduction.

5. Enter the amount of time to be deducted for the item you selected. For example, for a 15 minute break, you would enter .25 in the Hours field.

6. In the Time Period field, enter the number of hours that are to elapse before the deduction is taken.

   For example, if you deduct 15 minutes for breaks after 4 hours worked, enter 4 hours in the Time Period field.

7. Continue entering rows in the Hour Deduction Rules region to cover all the meals and breaks you require.

8. Save your work.

Expiring an Hour Deduction Policy

Use the Hour Deduction window to expire an existing hour deduction policy.

Note: You cannot expire an hour deduction policy that is assigned to an employee. You must first change the hour deduction policy assignment before expiring the hour deduction policy. Do not delete an hour deduction policy unless you wish the record removed permanently from the application. Deleting an hour deduction policy prevents an audit trail.

To expire an hour deduction policy:

1. Query to find the hour deduction policy you wish to expire.

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

3. Save your work.

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

2. Query to find the expired hour deduction policy you wish to view. The application returns the query with the expired hour deduction policy.

Creating a Shift Differential Policy

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 or she would be eligible to receive that shift differential premium.

Use the Shift Differential Policy window.

To create a Shift Differential Policy:

1. Change the effective From date to the appropriate start date for the policy. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the policy expires on a known date, you can enter it in the To field.

2. Enter the name of the shift differential policy and optionally enter a description.

3. In the Shift Differential Rules region, enter a name for the rule.

4. Enter the start and stop time of the shift differential.

5. The Carryover field displays the end time for the shift. If you want people to continue receiving the premium for this shift when they work into the next shift, update the Carryover field to the end time for receiving the shift differential premium.

6. Select the Premium Earning Type for the shift differential. This premium must also be on the person's premium eligibility policy.

7. Save your work.

Expiring a Shift Differential Policy

Use the Shift Differential policy window to expire an existing shift differential policy.

Note: You cannot expire a shift differential policy that is assigned to an employee. You must first change the assignment of the Shift Differential policy before expiring the shift differential policy. Do not delete a shift differential policy unless you wish the record removed permanently from the application. Deleting a shift differential policy prevents an audit trail.

To expire a shift differential policy:

1. Query to find the shift differential policy you wish to expire.

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

3. Save your work.

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

2. Query to find the expired shift differential policy you wish to view. The application returns the query with the expired shift differential policy.

Creating a Premium Eligibility Policy

A premium eligibility policy lists the authorized premiums associated with each Base hours type on the premium eligibility policy. Although the policy defines premiums for which people are eligible, this does not imply they will automatically receive them. Eligibility is based on time ranges, actual time worked, and applicable pay rules.

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

To create a Premium Eligibility Policy:

1. Change the effective From date to the appropriate start date for the policy. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the policy expires on a known date, you can enter it in the To field.

2. Enter the name of the premium eligibility policy, and optionally enter a description.

3. In the Premium Eligibility Rules region, select a Base Hours Type. You select from the list of elements for which you chose an earning category in the Element Time Information window.

4. In the Premiums region, select the appropriate Authorized Premium. You select from the list of elements for which you chose a *premium* earning category in the Element Time Information window.

5. Continue selecting all the authorized premiums that apply.

6. If you require more than one Base Hours Type, save the data and select another Base Hours Type. Then repeat steps 3 and 4.

7. Save your work.

Expiring a Premium Eligibility Policy

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

Note: You cannot expire a premium eligibility that is assigned to an earning policy. The earning policy will need to be expired prior to expiring the assigned premium eligibility policy. Do not delete a premium eligibility policy unless you wish the record removed permanently from the application. Deleting a premium eligibility policy prevents an audit trail.

To expire a premium eligibility policy:

1. Query to find the premium eligibility policy you wish to expire.

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

3. Save your work.

Viewing an Expired Premium Eligibility Policy:

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

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

2. Query to find the expired premium eligibility policy you wish to view. The application returns the query with the expired premium eligibility policy.

Creating a Premium Interaction Policy

While the premium eligibility policy determines which premiums a person may be eligible for, it is the premium interaction policy that determines how authorized premiums for a specific premium eligibility policy relate to each other--that is, the order of premium calculation.

Use the Premium Interaction Policy window.

To create a Premium Interaction Policy:

1. Change the effective From date to the appropriate start date for the policy. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the policy expires on a known date, you can enter it in the To field.

2. Enter the name of the premium interaction policy and optionally enter a description.

3. In the Premium Interaction Rules region, select a premium hours type.

4. In the Premiums region, select the appropriate premium.

5. Select Include if this premium is included in the hourly base formula for the premium selected in step 2, otherwise select Exclude.

6. Continue selecting all the authorized premiums that apply.

7. If multiple premium hours types are to interact with other premiums, save the data and select another Premium, as in step 2.

8. Continue entering all data following steps 3 to 5.

9. Save your work.

Expiring a Premium Interaction Policy

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

> **Note:** You cannot expire a premium interaction policy that is assigned to an earning policy. The earning policy will need to be expired prior to expiring the assigned premium interaction policy. Do not delete a premium interaction policy unless you wish the record removed permanently from the application. Deleting a premium interaction policy prevents an audit trail.

To expire a premium interaction policy:

1. Query to find the premium interaction policy you wish to expire.

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

3. Save your work.

Viewing an Expired Premium Interaction Policy:

Use the Premium Interaction window to view an expired premium interaction policy.

To view an expired policy

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

2. Query to find the expired premium interaction policy you wish to view. The application returns the query with the expired premium interaction policy.

Creating an Earning Policy

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.

Use the Earning Policy window to create a daily, weekly, or special earning policy.

To create an earning policy:

1. Change the effective From date to the appropriate start date for the policy. For initial implementation, this is usually a standard date (such as 01-Jan-1950) that predates any employee hire dates. If the policy expires on a known date, you can enter it in the To field.

2. Enter the name of the earning policy and optionally enter a description.

3. Select a Type of earning rule, such as Base, or an overtime rule:

   • Use Daily Overtime if you only need to define rules based on a day.

   • Use Weekly Overtime if you only need to define rules based on a week.

   • Use Special Overtime if you are defining rules that are based on a combination of a day, and/or week, and/or a consecutive days' basis.

4. If you wish to use the points as assigned on the elements, select the points box. Otherwise, leave blank

5. Select a Holiday Calendar.

6. In the Earnings included to meet OVT cap field, select the appropriate earning group.

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 are 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 14:00, 14:15, 14:30, 14:45, 15:00, 15:15, etc.

10. Enter the amount in the Round Up At field, if applicable.

    If the minimum timecard interval is 15 and the Round Up At is 8, then time clocked at 14:07 would be rounded down to 14:00, but a time clocked at 14:08 would be rounded up to 14:15. These would be the hours and increments that would be sent to Element Entries and retained in the database.

11. Enter rules in the Daily/Weekly Base and Overtime Rules region, according to the policy type you selected in step 3. If you selected:

    • Daily, you must enter DAY and HOL

    • Weekly, you must enter WKL and HOL

    • Special, you must enter DAY, WKL, and HOL.

    Ensure you enter rules in this sequence: Daily, Weekly, and Special, if all are applicable.

12. Enter all applicable rules.

13. Save your work.

Expiring an Earning Policy

Use the Earning Policy window to expire an existing earning policy.

> **Note:** You cannot expire an earning policy that is assigned to an employee. You must first change the earning policy assignment to an effective earning policy. Do not delete an earning policy unless you wish the record removed permanently from the application. Deleting an earning policy prevents an audit trail.

To expire an earning policy:

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

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

3. Save your work.

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

2. Query to find the expired earning policy you wish to view. The application returns the query with the expired earning policy.

5

Setup of Retrieval and Deposit Processes

Deposit and Retrieval Process

Each Deposit and Retrieval process refers to a mapping. The mapping defines the set of timecard fields that the process deposits or retrieves and where these are held in the timecard.

How can you use the time data for payroll processing and in Oracle Projects?

Oracle Human resources, Oracle Payroll, and Oracle Projects can retrieve time and labor data according to a schedule and retrieval rules that you define. The retrieval rules specify which approval processes must be complete before the data is retrieved by the application. You associate an application set with each worker to specify which applications are interested in that person's time.

You define an element set to specify the elements for which you are collecting time entries using Oracle Time & Labor. You define a mapping to specify which elements and other fields are to be retrieved by each application. Time entries are passed to elements using Batch Element Entry, and to Oracle Projects using the Transaction Import process.

Can we define new fields on a timecard and have the data in these fields deposited into the time store?

If you define new fields to be captured by Oracle Time & Labor, you define new contexts and segments for the OTL Information Types descriptive flexfield. You can then create mapping components for these fields. You can add your new mapping components to the predefined deposit mapping.

Retrieval and Deposit Processes

Retrieval and Deposit Processes Overview

A deposit process defines the data that a source application can deposit in the time store. There is a predefined deposit process for Oracle Time & Labor.

A retrieval process defines the data that a recipient application can retrieve from the time store. There are predefined retrieval processes for Oracle Human Resources, Oracle Projects, and Oracle Payroll.

Mappings

Each deposit and retrieval process refers to a mapping. The mapping defines the set of timecard fields that the process deposits or retrieves, and where these are held in the time store. The fields are defined as mapping components. There are predefined mappings for the predefined processes.

New Components and Mappings

If you are defining new fields to be captured by Oracle Time & Labor, you define new contexts and segments for the OTL Information Types descriptive flexfield. Then you create mapping components for these fields. You can add your new mapping components to the predefined deposit mapping. Do not change the predefined deposit process.

If you need to define a new retrieval process (for a third party or Oracle application), you can create new mapping components and a mapping, then select this mapping for your new process.

Retrieval Rules

There is at least one retrieval rule for each retrieval process. These rules determine the approval status that data must achieve before the process can retrieve it. For example, the predefined Payroll and Projects Retrieval Rule requires that the data has been approved by both Oracle Payroll and Oracle Projects.

Defining Mapping Components

This task is optional.

You define mapping components to determine what data is placed in the time store and where it is placed. Create mapping components before grouping them as mappings. You only need to define new mapping components and mappings if you have created new timecard fields. Otherwise you can use the predefined mappings.

Use the Mapping Components window.

To define mapping components:

1. Enter a unique name for the component.

2. Enter the field name. This is the name that the deposit and retrieval API's use.

3. In the Type field, select the context that you created in the OTL Information Types descriptive flexfield for this component. The category is displayed automatically.

4. Select the descriptive flexfield segment that you created for this component.

5. Repeat steps 1-4 until you have mapped all your new components.

6. Save your work.

Define Mappings

This task is optional.

Define a mapping to group individual field mapping components together. Mappings are referenced by the retrieval and deposit processes.

You only need to define new mapping components and mappings if you have created new timecard fields, or added to the timecard layout. Otherwise you can use the predefined mappings.

Use the Mappings window.

To define mappings:

1. Enter a name for the grouping of components.

2. Select the first component name.

   The remaining fields are displayed automatically.

3. Continue to select the components that are associated with the grouping.

4. Save your work.

Defining Retrieval Processes

A retrieval process is predefined for each recipient application (Oracle Payroll, Oracle HR, and Oracle Projects). When you view a process in the Retrieval and Deposit Processes window, you can see the mapping it uses, which determines the data to be retrieved. If you have defined your own mappings, you can define new processes to use these mappings through an enhancement and or customization.

If you need more than one retrieval process for an application-for example, to retrieve unapproved data each day, and approved data at the end of the week-you can define additional retrieval processes.

> **Note:** You must not retrieve unapproved data into Oracle Projects.

Use the Retrieval and Deposit Processes window.

To define retrieval processes:

1. Select the process type Retrieval.

2. Select the appropriate recipient application from the defined application set:

   • Projects

   • Payroll

   • Human Resources

3. Enter a process name to describe the retrieval process.

4. Select the appropriate mapping for this retrieval process.

5. Save your work.

Defining Deposit Processes

There is a predefined deposit process for depositing data from the timecard to the time store. If you are using Oracle Time & Labor to capture your time data, you do not need to change this deposit process or create a new one. When you view a process on the Retrieval and Deposit Processes window, you can see the mapping it uses, which determines the data to be deposited. If you have defined new mapping components, you can add them to the predefined deposit mapping.

Defining a new deposit process involves customizing Oracle Time & Labor. In addition to coding your customizations, you define the new process on the Retrieval and Deposit Processes window.

To define a deposit process:

1. Select the process type Deposit.

2. Select the appropriate source.

3. Enter a process name to describe the deposit process.

4. Select the appropriate mapping for this deposit process.

5. Save your work.

Retrieval Rules

Retrieval Rules Overview

There are predefined retrieval rules associated with each retrieval process to define which recipient applications must approve time and labor data before the process can retrieve the data. The time store holds an approval status for each day and each application period for each person. The statuses are:

- Submitted - Application period is submitted and all the days in a period have a submitted status.

- Approved - Application period has been approved.

For example, you might use two retrieval processes for an applications: one retrieves any submitted data, on a daily basis, and the other retrieves approved data at the end of the week. If you are concerned to reduce the likelihood of changes after data has been retrieved for Payroll, you might use a monthly Payroll retrieval process that retrieves all data for the period that has been approved by both Projects and Payroll.

> **Caution:** You must not retrieve unapproved data into Oracle Projects.

The following diagram illustrates how the application derives the statuses:

Retrieval Rules

7 submitted days

Application 1 has approved one period

Application 2 has approved several periods:

If the applications can retrieve all data that they have approved and has been submitted to other applications:

If the applications can only retrieve data that has been approved by both applications

Key: Submitted   Approved   Retrieved
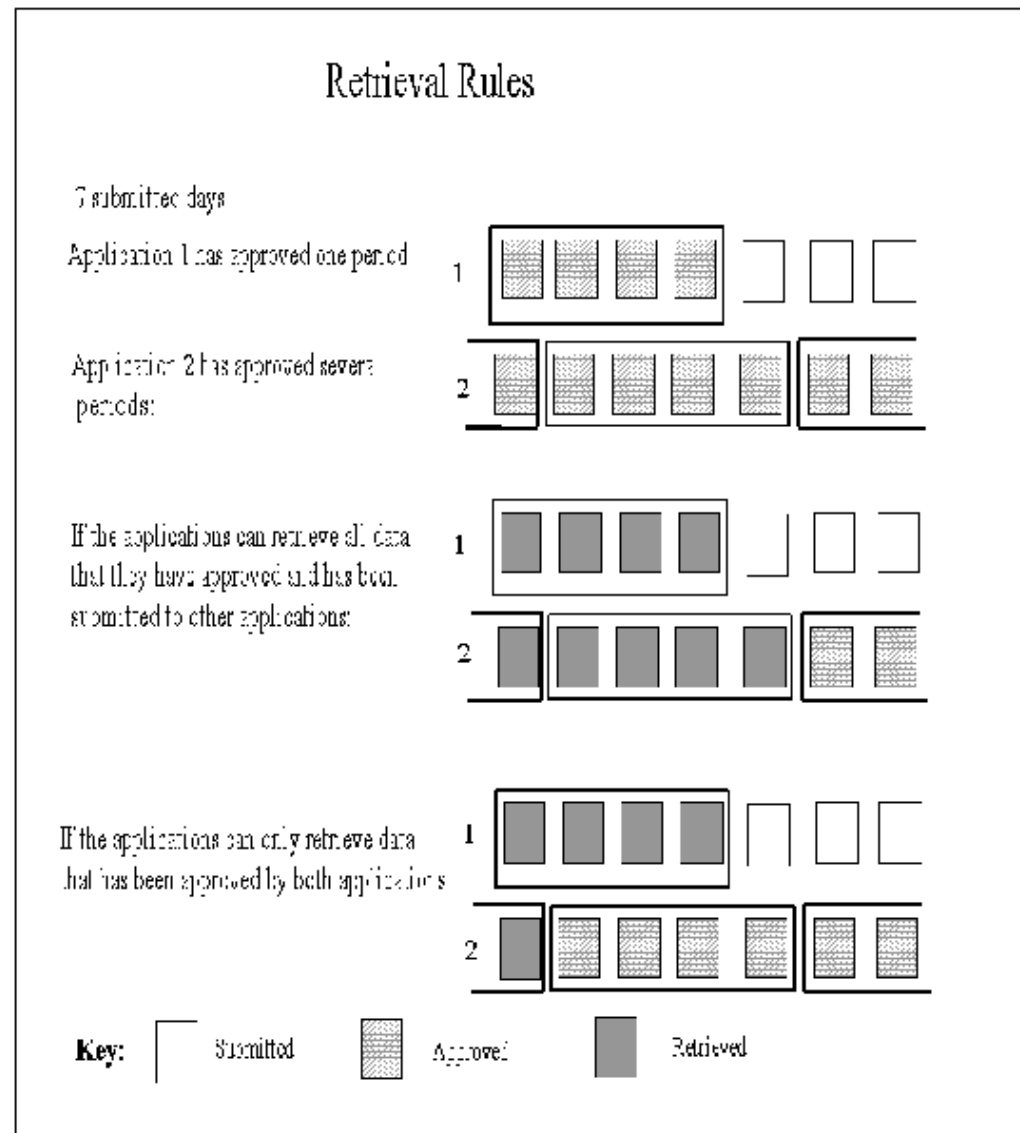
Retrieval Rule Groups

Retrieval rules are grouped together by a retrieval rule group, which you can assign to groups of people via preferences.

> **Important:** It is important that you do not assign someone a retrieval rule group that contains rules for applications that are not in the person's application set. This would result in a validation error when the person submits a timecard. For each predefined retrieval rule group, there is an equivalent predefined application set. You can view the predefined application sets in the Application Set window.

The retrieval rule groups are listed below, with the rules that they contain. The Human Resources Retrieval Rule group is used in default preferences, and the Projects Retrieval Rule Group is used in the Projects default preferences.

- Projects Retrieval Rule Group

  Projects rule (associated with Projects Retrieval Process) - data must be approved by projects

- Payroll Retrieval Rule Group

  Payroll rule (associated with BEE Retrieval Process) - data must be approved by Payroll.

- Human Resources Retrieval Rule Group

  Human Resources (associated with BEE Retrieval Process) - data must be approved by HR.

- Projects and Payroll Retrieval Rule Group

  Projects and Payroll - Approved (associated with Projects Retrieval Process) - data must be approved by both Projects and Payroll

- Human Resources and Projects Retrieval Rule Group

  Projects and Human Resources - Approved (associated with Projects Retrieval Process) - data must be approved by both Projects and HR.

- Human Resources and Payroll Retrieval Rule Group

  Payroll and Human resources - Approved (associated with BEE Retrieval Process) - data must be approved by both Payroll and HR.

- HR, Payroll and Projects Retrieval Rule Group

  Human Resources and Payroll and Projects (associated with BEE Retrieval Process) - data must be approved by all three applications.

Defining Retrieval Rules

You can establish retrieval rules for the recipient applications to retrieve time and labor data when it is at a certain status. There are predefined retrieval rules for Oracle HR, Oracle Payroll, and Oracle Projects.

> **Note:** Data must be approved before it is retrieved by Oracle Projects.

Use the Retrieval Rules window.

To define retrieval rules:

1. Enter a retrieval rule name.

2. Select the retrieval process name.

3. Select an application and the approval status that this application must return before the retrieval process can retrieve the data:

   - Working - Time has been entered for the application period but not yet submitted for approval.

   - Submitted - Application period is submitted and all the days in a period have a submitted status.

   - Approved - Application period has been approved.

4. Repeat step 3 as needed for the retrieval process.

5. Save your work.

Defining Retrieval Rule Groups

You can select a number of retrieval rules together in the Retrieval Rule Groups window to form a group. You associate a group with your workers using preferences.

> **Note:** Even if you have just one rule, you must create a group for it so that you can select it in the Preferences window. Several groups are predefined.

To define a retrieval rule group:

1. Enter a name for the group.

2. Select the retrieval rules that are to comprise this group.

3. Save your work.

Running the Generate Flexfield and Mapping Information Process

The time store holds element, key flexfield, projects, and projects descriptive flexfield information in the OTL Information Types descriptive flexfield. The Generate Flexfield and Mapping Information process creates the context and segments in this flexfield to hold the element, key flexfield, and projects information you want to store. For example, it creates a context for each element and key flexfield, and a segment for each element input value and key flexfield segment.

You must run the Generate Flexfield and Mapping Information process during implementation and later if you change the elements, element input values, key flexfield information, or projects information that you want to hold in the time store.

You can also use this process to delete some or all of your existing definitions. For example, if you want to change the element set, run the process with the Remove Definitions parameter set to Yes, then run it again, this time selecting your new element set in the Element Set parameter.

Use the Submit Request window.

To run the Generate Flexfield and Mapping Information process:

1. From the Submit Request window, select Generate Flexfield and Mapping Information.

2. In the Parameters window, enter the following:

   • Delete Definitions - select Yes to remove mapping for fields previously defined. For example, if you set this value to Yes, and a value of Yes is in the field Include Cost Flexfield, you are removing the definitions for the element set and Cost Flexfield. This function serves as an undo process for removing the element sets and flexfield definitions you previously created.

   • Element Set - if you are creating contexts and segments for elements, select the appropriate element set. The elements in this set are *added to* existing elements in the flexfield.

   • Effective Date - enter the system date for this process.

- Select Yes in the following fields to indicate that deposit processes write to this field within the time store. This does not indicate that the field appears on the timecard:

    - Include Cost Flexfield

    - Include Group Flexfield

    - Include Job Flexfield

    - Include Position Flexfield

    - Include Expenditure Items Flexfield

3. Choose OK to close the Parameters window and choose Submit to run the process.

4. Next, review the segments generated by this process.

   See: Reviewing the OTL Information Types Segments, page 5- 9

Reviewing the OTL Information Types Segments

After running the Generate Flexfield and Mapping Information process, you must review the segments that this process has generated in the OTL Information Types flexfield. These segments hold the element input values and flexfield segments in the time store. You can choose which segments to enable and display.

Use the Descriptive Flexfield Segments window.

To enable and display the flexfield segments:

1. Query the OTL Information Types descriptive flexfield.

2. Unfreeze the flexfield by unchecking the Freeze Flexfield Definition check box.

3. In the Context Field Values region, select a context generated for an element or flexfield.

4. Choose the Segments button.

5. Review the segments generated for the element, key flexfield, or expenditure type. Notice that segments generated from the Expenditure Items flexfield have a prefix.

   - Check the Displayed check box for all input values or flexfield segments that you want to display on the timecard.

   - Check the Enabled check box for all input values or flexfield segments that you want to hold in the time store.

     > **Note:** Consider making *Optional* all the Oracle Projects information segments to appear on the Details pages, even if they are *Required* in the Expenditure Items flexfield. If the segments are not required in the OTL Information Types flexfield, you must enter values for all the instances of the required field on the Details page (each day of the week). You cannot close the page until all the values are entered. If you make these segments optional, there is no validation until the user completes their entry and submits the timecard. Then the entries on the Details page are validated against the Expenditure Items flexfield.

6. In the Descriptive Flexfield Segments window, check the Freeze Flexfield Definition check box.

7. Choose the Compile button to recompile the flexfield.

   For more information about the Descriptive Flexfield Segments window, see: Defining Descriptive Flexfield Structures.

6

Time Entry Validation and Approval

Validation and Approval for Time Entry

You can define various time entry validation rules and approval processes for time and labor data entered within Oracle Time & Labor.

What validations take place when entering data into the web-based timecard?

Validation of the employee's time entry happens from any or all of the following:

- Time Entry rules
- Oracle Projects transaction controls and constraints
- Oracle Human Resources eligibility criteria on element links

How do you manage separate approval chains for different groups of workers and different types of time entry?

You associate an approval style with each employee using preferences. The approval style defines who approves the employee's timecards for each recipient application. The approver could be a named individual, the employee's supervisor, or more than one person in a workflow, or any other rules you define using a formula.

The approval style also defines which data needs to be approved for each application, and which data changes require resubmission.

Does Oracle Time & Labor allow managers to record timecards for their employees?

A manager can create, edit, and submit timecards for employees based upon the employee's assigned preferences. Managers can also view prior period timecards for employees.

This allows managers to record time for absent employees, workers who may not be available to enter their time before the retrieval cut off date.

Is there a feature within Oracle Time & Labor that allows us to track why our workers are submitting late or changed time entries on their timecards?

The Change and Late Audit feature includes time entry rules to determine which time entries on workers' timecards require auditing. You can define additional validation rules requiring workers to enter an explanation of why a change was made to their timecards or why the entry is late.

Approvals

Approvals Overview

Using Oracle Time & Labor you can control when timecards are submitted for approval and who approves them. You can set up multiple approval chains and use different approval rules for each recipient application. Employees' timecards are submitted to the approval processes defined by their Approval Style preference.

Inline notifications allow the approver to view timecard detail from their Worklist. Using inline notifications, the approver has all the detailed timecard information in one location easing the approval process.

Approval Periods

You define an approval period to control when timecards are submitted for approval by each application. Often, the approval period is the same as the application period - when an employee submits all the timecards for an application period, the time store automatically starts the approval process for that application. However, you can define an approval period so that timecards are submitted for approval more frequently. For example, for the convenience of approvers, you might define a weekly approval period for payroll, even though the payroll period is monthly.

Approval Styles

When timecards are waiting to be approved, the appropriate approver can review them on the Mass Timecard Approval page, or the Advance Worklist page. With inline notifications, you can easily approve timecards by reviewing all the timecard data in one place. You associate an approval style with each employee using preferences. The approval style defines who approves the employee's timecards for each recipient application. The approver could be a named individual, including a contingent worker, the employee's supervisor, more than one person in a workflow, or any other rules you define using a formula.

The approval style also defines which data requires approval for each application, and which data changes require resubmission. For example, you might use a formula to specify that a change of 10% or more in total hours requires a worker to resubmit a timecard to the Payroll approval workflow.

Entry Level Approvals

Entry Level Approval allows timecard approvers to see only the time data entries they are responsible for approving. For example, Approver A may be responsible for Projects 1, 2 and 3, while Approver B is responsible for all remaining projects. When a worker submits their timecard for approval, Approver B will not see any time entry data for Projects 1, 2, and/or 3.

Entry Level Approval is set up via the Approval Style window, as an Approval Type. If you select Entry Level Approval as the Approval Style Component type, you must also navigate to the Entry Level Approval Components window to enter additional details. Here, you link to specific time categories to be approved by a specific approver. Time categories can include elements, projects, task and so forth.

Entry Level Approval works as any other approval style. The worker enters their time as usual, and the workflow routes the entries to the appropriate approver. The approver can view the data via the Mass Timecard Approval, or the Worklist.

Approval Process

When an employee submits a timecard, Oracle Time & Labor checks the person's application set to determine which applications are interested in this person's time. (You assign application sets to people using preferences).

For each application, there is a date when timecards are submitted for approval. This defaults to the end of the timecard period (such as the end of a Projects week, or Payroll month) but you can override it by defining an approval period for the application. If it is time to submit the timecards for approval, Oracle Time & Labor checks the person's approval style. The approval style defines which data entries or changes require approval for each application. If the employee has entered or updated any of the data that requires approval, Oracle Time & Labor routes the timecard for approval, using the approval method recorded on the approval style for that application.

Override Approvers

The predefined Oracle Projects timecard layout has an Override Approver field. The worker can select anyone in the business group as the override approver. The timecard is sent to this approver only, and the usual approval style is not activated.

The field is enabled by setting the following preferences:

- Enter Override Approver preference set to Yes

- Override Approval Style segment of the Approval Style preference set to Projects Override Approver

- (Optional) Default Approver preference set to a name to display a default value for the Override Approver field.

You can restrict the list of values for the Override Approver field by modifying the Overriding Approver view. See: Appendix B Oracle Projects Integration Notes: page B-4

You may wish to define and apply a custom Override Approval Style segment and not use the predefined Projects Override Approver.

Approval Setup

There are various steps involved in setting up approvals. The diagram below illustrates how the approval definitions relate to each other. You can assign the definitions to a person or a group of people via preferences.

Setting Up Approvals

```
┌─────────────────────────┐                      ┌─────────────────────────┐
│                         │                      │                         │
│  Recurring Time Period  │────────────────────▶ │    Approval Periods     │
│                         │                      │                         │
└─────────────────────────┘                      └─────────────────────────┘
                                                              │
                                                              ▼
┌─────────────────────────┐                      ┌─────────────────────────┐
│                         │                      │                         │
│    Time Entry Rules     │                      │       Preferences       │
│                         │                      │                         │
└─────────────────────────┘                      └─────────────────────────┘
             │                                                ▲
             ▼                                                │
┌─────────────────────────┐                                  │
│                         │                                  │
│     Approval Styles     │──────────────────────────────────┘
│                         │
└─────────────────────────┘
```
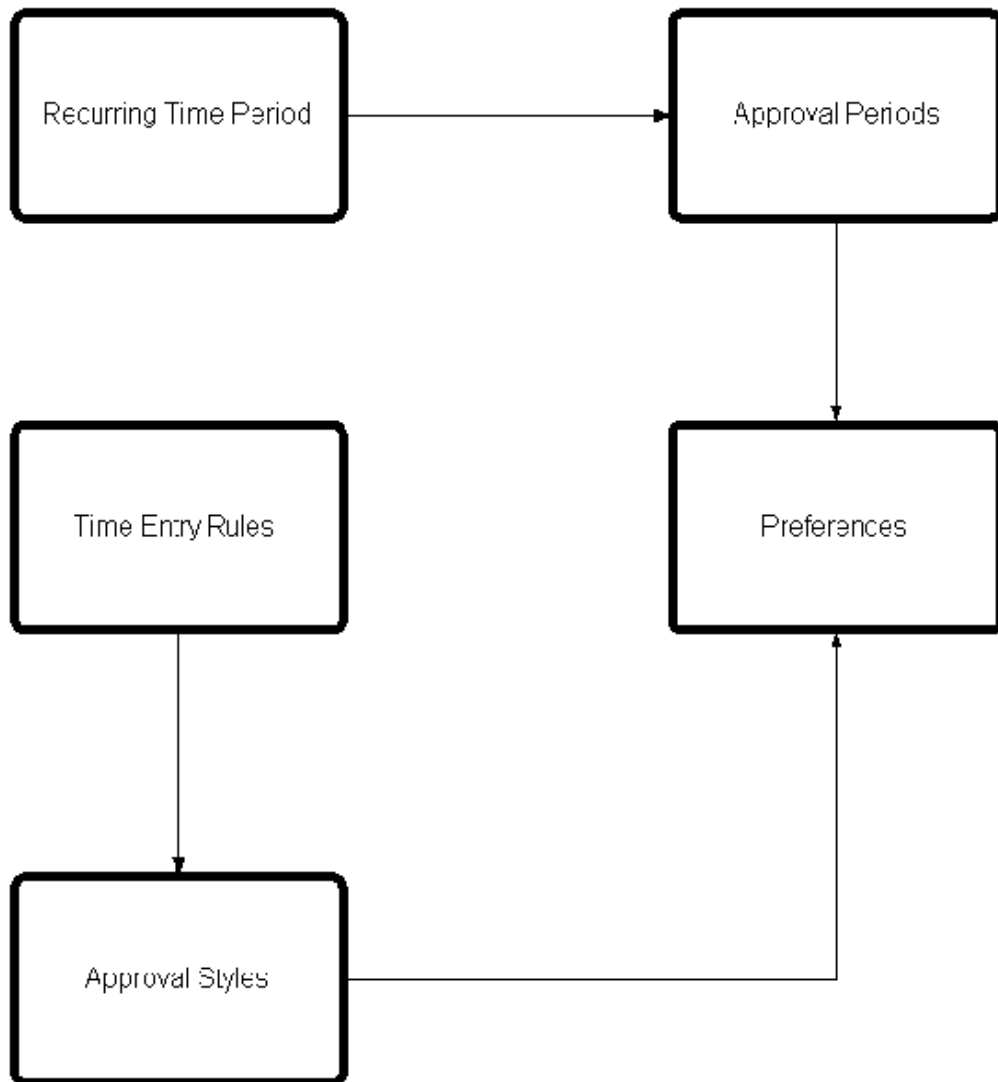
Time Periods for Data Entry and Approval

Overview of Time Periods for Data Entry and Approval

You can define recurring time periods to determine the frequency of timecard entry and approval. In the Recurring Time Period window, you can select any of the predefined payroll period types (such as Weekly, bi-weekly, monthly) or you can create your own period by using the Duration in Days (such as 3 days, 7 days, 12 days). You can define as many recurring time periods as you require.

There is one predefined recurring, which is Weekly - Starts Sunday.

All the Recurring time periods you define are available for you to use in the two ways:

- You can select them as timecard entry periods in the Preferences window.

- You can associate them with an application to define approval periods in the Approval Periods window.

In some implementations, timecards are submitted for approval to an application at the end of the application's time period (such as the end of the payroll period). However, you might want timecards to be approved more frequently. For example, if the payroll period is monthly, you might define a weekly approval period for Oracle Payroll.

If you want to use different approval periods for different groups of employees, you can define more than one set of approval periods. Each set defines approval periods for some or all of the applications you use. You assign a set of approval periods to groups of employees using preferences.

Defining Recurring Time Periods

You can use recurring time periods as approval periods or time entry periods. You can define as many recurring time periods as you require.

> **Note:** The time entry period for Oracle Projects must have the same end date as the projects period. See: Implementation Options, *Oracle Projects User Guide*.

Use the Recurring Time Period window.

To define recurring time periods:

1. Enter the name of the recurring time period.

2. Do one of the following:

   - Select period type

   - Enter duration in days

3. Enter a Start Date to indicate the date the Period Type begins or the first date of the Duration of Days.

4. Save your work.

Defining Approval Periods

For each recipient application, you can define the period for approval of time and labor data. You can define more than one set of approval periods if you need to use different approval periods for different groups of employees. You associate sets of approval periods with groups of people using preferences. The approval period set in the default preferences is Weekly Period-Starts Sunday.

Use the Approval Periods window.

To define approval periods:

1. Enter a unique name for the approval period.

2. Select the application name.

3. Select the recurring period to associate with the application.

4. Continue to select applications and recurring periods for this set. Select each application once only per set.

5. Save your work.

Time Entry Rules for Validation

Overview of Time Entry Rules for Validation

Legislation, collective agreements, or industry practice may set limits on the number of hours your employees can work. When a timecard is submitted, the application checks it against your time entry rules, and issues a business message, error, or warning.

For example, European Working Time Directive rules limit the number of hours worked during a period within a reference period of a certain number of days.

Each time entry rule uses a formula to calculate whether the rule has been broken by the current timecard. You can define as many rules as you require, then group them on the Time Entry Rules Group window. Here, you also define what type of notification is sent for each rule. Once all the groupings are defined, you assign a time entry rule group to an individual or a group of individuals via preferences.

Time Categories

So that you can validate particular types of time (such as overtime, or hours worked on a particular project), you can define time categories. A time category is a group of mapping components that can appear on a timecard - such as elements, projects, or tasks - with one or more specific values for each component. For example, you could define the category Regular Time containing the elements Regular Salary and Time Entry wages.

Mapping components relate to segments you have defined in the OTL Information Types descriptive flexfield. These segments can have a value set associated with them, which define the list of values.

> **Note:** When you are defining categories, you cannot use components that use a table-validated value set containing the $PROFILES$ or $FLEX$ nomenclature.

Time Categories can contain other time categories, as well as individual components. For example, you could define time categories for Sickness and Vacation, then define a third category called Absence that contains these two categories.

Period Maximum

To support the European Working Time Directive, we supply a formula for Period Maximum which will send notification when the hours worked within a time category per period, averaged over a reference period, exceed a predetermined maximum. You define the period maximum, time category, period, and reference period when creating the time entry rule.

For example, you might define a maximum of 40 regular hours per week in a reference period of 14 days. The formula looks at the average number of regular hours worked per period over the reference period. In this example, it looks at the hours worked in the current week and the previous week. Employees who work 35 hours one week and 45 hours the next week have not exceeded the time entry rule because their average hours worked over the 14 days is 40 (that is 35+45)/2). Similarly if they work zero hours one week, and 80 hours the following week, they have not exceeded the rule - but they must work zero hours the next week too.

If you define a reference period that is less than or equal to the period, then it has no effect. So, a rule of 40 hours per week over 5 days, means that the maximum is 40 hours in each 7 day period, without reference to any other period.

If you want to implement other time entry rules, you can configure a copy of the predefined formula, or write a new formula to best suit your enterprise needs.

Time Entry Rules for Approval

Overview of Time Entry Rules for Approval

When a person submits their timecard for a period, Oracle Time & Labor check the person's approval style. The approval style includes time entry rules for each application. These rules define what data entry or changes require approval for that application.

For example, you could define that all information used by Oracle Payroll must be approved when it is entered or updated, whereas Oracle Projects data only needs to be approved if it exceeds limits that you specify in a formula.

There are two ways to define a time entry rule:

- You can **select a set of fields** that must be approved when they are entered or updated. The fields are defined as mapping components, then grouped together into a mapping.

- You can **use a formula** that defines the rules. For example, you could use a formula to ensure that all timecards recording more than 40 hours per week over two weeks are submitted for approval. Another formula could ensure that timecards recording more than a certain number of overtime hours are sent for approval. Use a formula if your rules of submission for approval require more than simply monitoring a set of fields for changes.

There are three seeded approval formulas: to check hours against a maximum, to check assignment status, and to route timecards to the override approver selected on the timecard.

You also specify when the application should use each rule:

- Submission is when the completed timecards for the entire approval period are submitted for the first time.

- Resubmission is when timecards have been approved and the employee makes changes to any of the time or labor data field.

- Submission/Resubmission indicates approval is required on initial submission of the timecard and on resubmission when the employee changes the time or labor data after approval.

- Save indicates approval is required when the worker selects the Save button on the timecard page.

You can define different time entry rules for submission and resubmission. For example, you might want all data approved initially, but only require re-approval if time is subsequently changed by more than a certain limit.

> **Important:** In the current release, all rules must apply to Both (submission and resubmission).

Setting Up Time Entry Rules Based on Formulas

Follow these steps if you want timecards to be validated against time entry rules, such as European Working Time Directive rules. Also follow these steps if you are defining time entry rules for approval, using a formula. If you are using one of the supplied formulas, without change, you will not need to perform steps 1, 2, 3, or 4.

To set up time entry rules:

To set up time entry rules:

1. Create a new formula or copy and configure a predefined formula. The formula must have a formula type of OTL Time Entry Rules, and must have certain input and outputs.

   See: Writing Formulas for Time Entry and Approval Rules: page 8-13.

2. Unprotect the OTL Formula descriptive flexfield by unchecking the Protect check box on the Descriptive Flexfield window.

3. Create a context and segments in this flexfield for your new formula using the Descriptive Flexfield Segments window.

   See: Adding Contexts to the OTL Formulas Flexfield: page 8-17

4. In the Descriptive Flexfields window, check the Protect check box again so that the OTL Formulas descriptive flexfield remains a protected field.

5. If your rules are to analyze certain types of time only (such as overtime, or time on a specified project), define these time categories.

   See: Defining Time Categories: page 8-18

6. Define time entry rules on the Time Entry Rules window, including input values for the formula. The new field values defined in step 3 will be available for selection. You can define as many rules as necessary to access the new formula.

   See: Defining Time Entry Rules: page 8-19

7. Do *one* of the following:

   • If you time entry rules are for validation, define time entry rule groups on the Time Entry Rule Groups window. Select the appropriate outcome for each time entry rule. You can define as many rules groups as necessary.

   See: Defining Time Entry Rule Groups: page 8-20

   • If your time entry rules are for approval, select them when you define approval styles.

   See: Defining Approval Styles: page 8-26

8. Assign time entry rules to an individual or a group of individuals using the Preference window:

   • If your time entry rules are for validation, assign a time entry rule group to an individual or group.

   • If your time entry rules are for approval, assign an approval style to an individual or group.

   See: Defining Preferences: page 10-13.

Writing Formulas for Time Entry and Approval Rules

You can write any number of formulas using the Human Resources responsibility to validate timecards when they are submitted. You can also write formulas that define what time and labor entries or changes require approval before they can be retrieved by a particular application that uses data from Oracle Time & Labor. For example, you

could specify that overtime entries above a certain level require approval. Formulas for both purposes must be of type *OTL Time Entry Rules*.

For each new formula, you create a new flexfield context in the OTL Formulas flexfield. For each new context, you create a segment for each formula input you want to enter through the Time Entry Rules window. Then you can select the formula on this window for one or more rules, making appropriate entries for its inputs for each rule.

Example
For example, you might write a new formula called USR_OVERTIME_MAXIMUM, which requires the following inputs to be entered for a time entry rule:

- USR_OVERTIME_MAXIMUM

- USR_OVERTIME_PERIOD

- USR_OVERTIME_SHIFT_LEVEL

Then you could use this formula to define a number of time entry rules, where each rule specifies the overtime maximum for a specified shift level.

Predefined Formulas:
There are many predefined formulas of type OTL Time Entry Rules:

- Seeded formula for Period Maximum (HXC_PERIOD_MAXIMUM), which checks that the number of hours worked within a time category (or across all categories) does not exceed the specified limit per week (or other period) over a specified reference period (such as 14 days).

  You can use this formula in time rules for validation.

     Note: European users: You can use or adapt this formula to implement European Working Time Directive (WTD) rules.

- Approval - Assignment Status Test (Seeded) (HXC_APPROVAL_ASG_STATUS), which checks the assignment status of the employee at the end of the approval period against a value specified on the Time Entry Rules window. If the statuses do not match, the time entries must be approved.

  You can use this formula in time rules for approval to specify which assignment statuses do not need special approval.

- Approval - approval maximum test (Seeded) (HXC_APPROVAL_MAXIMUM), which checks whether the number of hours worked in a time category within an application approval period exceeds a maximum entered in the Time Entry Rules window. If it does, the time entry must be approved.

  You can use this formula in time rules for approval.

  This is similar to the Period Maximum except the period is fixed (application approval period) and there is no rolling average (reference period).

- Override Approver WF Person Mechanism (Seeded Approval) (HXC_OVERRIDE_APPROVER_WF_PERSON), which is the override approval style in the default Projects preferences. It sends timecards to the override approver selected on the Timecard entry page.

- Assignment Standard Hours vs Time Category (Seeded Formula) (HXC_ASG_STD_HRS_Comparison), which validates hours entered on the timecard

within selected time categories against an assignment's standard hours. The rule uses the standard hours recorded for the employee's primary assignment.

- PTO Accrual Balance vs Absence (Seeded Formula) (HXC_PTO_ACCRUAL_ Comparison), which compares the hours entered on the timecard which decrement the accrual balance as specified in the Accrual plan definition against the PTO Accrual balance.

- Period Hours vs Time Category (Seeded Formula) (HXC_TIME_CATEGORY_ Comparison), which validates hours entered on a timecard against the hours defined for a period.

You can copy and configure all these formulas, or write your own formulas, according to the following rules.

Formula Inputs and Outputs

Formulas executed from time entry rules (for validation or approval) must be of the following form:

```
INPUTS ARE resource_id (number)
    submission_date (text)
    <other inputs>
 /* Formula Processing */
RETURN <formula result>, <message 1..5>
```

Outputs:

<formula result> is:

- RULE_STATUS with the value S (success) or E (error) for formulas used for validation

- TO_APPROVE with the value Y (to initiate the approval process) or N (indicating that approval is not required) for approval formulas

<message 1..5> means that the formulas can also return up to five messages, which must be passed back in the optional return values MESSAGE1, MESSAGE2, MESSAGE3, MESSAGE4, MESSAGE5. You define these messages in the Messages window, and they must belong to product HXC.

See: Messages Window, *Configuring, Reporting, and System Administration Guide (Global)*

On the Time Entry Rule Group window, you specify whether these messages are business information, errors, or warnings (for validation formulas). Validation messages display when workers save or submit their timecards. Approval messages are sent as notifications in accordance with your approval workflow setup.

Inputs:

Inputs

You can display up to 15 inputs on the Time Entry Rules window so that you can pass in inputs from the time entry rule definition to your formula.

Your formula must also have the following static inputs, which are passed to all OTL formulas.

resource_id	This is the person id of the person whose timecard is being checked against the rule.
submission_date	The first day of the timecard period

> **Note:** Even if the flexfield context for your formula in the OTL Formulas flexfield has a segment called TIME_CATEGORY you do not need to add a similar formula input.

You can use the following inputs if the descriptive flexfield context for your formula has a segment called PERIOD which contains a valid HXC_RECURRING_PERIOD (that is, it uses the value set HXC_TCARD_PERIOD), and a segment called REFERENCE_PERIOD, which is a number.

Timecard Hours	The number of hours that appear on the timecard and are included in the period specified in the PERIOD segment.
Duration in days	The duration in days specified or derived from the period specified
db_pre_period_start	The start date of the pre timecard period not covered by the timecard
db_pre_period_end	The end of the pre timecard period not covered by the timecard.
db_post_period_start	The start of the post timecard period not covered by the timecard
db_post_period_end	The end of the post timecard period not covered by the timecard

Use the last four inputs, above, when the period specified in the PERIOD segment is greater than the timecard period. In this case the formula needs to derive, from the database, hours prior to or following the timecard period, which do not appear on the timecard itself.

The predefined formula HXC_PERIOD_MAXIMUM uses a reference period segment. If your formula uses this segment, you can use the following inputs to specify the start and end of the reference period.

db_ref_period_start	The start of the reference period that is not covered by the timecard
db_ref_period_end	The end of the reference period that is not covered by the timecard

> **Note:** The db_ref_period_start and end inputs are integrated with the db_pre and db_post period start and end inputs. That is, where appropriate these dates are adjusted when the reference hours are found

on the time card. Do not specify a REFERENCE_PERIOD in your
descriptive flex context without specifying the PERIOD.

Adding Context to the OTL Formulas Flexfield

If you are creating a new formula for time entry rules, you need to create a new context
and segments for the OTL Formulas descriptive flexfield. Use the Descriptive Flexfield
Segments window.

1.   Query the OTL Formula flexfield.

2.   Unfreeze the flexfield by unchecking the Freeze Flexfield Definition check box.

3.   In the Context Field Values region, create a new context, which must have the same
     name as your new formula.

> **Note:** Do not make any changes to the predefined contexts
> PERIOD_MAXIMUM, APPROVAL_ASG_STATUS, APPROVAL_
> MAXIMUM, or OVERRIDE_APPROVER_WF_PERSON because
> these changes will not be preserved when upgrading Oracle
> Time & Labor.

4.   Choose the Segments button and create a segment for this context for each formula
     input for which you wish to enter inputs in the Time Entry Rules window. The
     names of the segments must match exactly the formula input names.

     You can create a segment for Time Category to enable creation of time entry rules
     that evaluate one category of time (such as overtime, or absence). Make this segment
     optional if you also want to enable creation of time entry rules that evaluate all types
     of time. There is no corresponding formula input for this segment.

5.   Complete your definition of the segments, including any values validation.

     See: Defining Descriptive Flexfield Structures.

6.   Check the Freeze Flexfield Definition check box and save.

Defining Time Categories

You can define time categories for reporting and to identify the time to be analyzed
by time entry rule formulas. For example, you can define categories for particular
projects, or for vacation, or overtime.

The following categories are predefined: Premium Hours, Non-Worked Hours, Billable
Hours, Non-Billable Hours, and Total1 through Total10. These categories are supplied
empty so that you can select the mapping components and subcategories you want to
sum to provide totals.

Total1, Total2, and Total3 are used by the predefined timecard layouts to display totals
on the timecard summary and approval summary pages.

Use the Time Categories window.

To define time categories:

1.   Enter a unique name for the category.

2. Select either an existing time category or a mapping component to define the category.

> **Note:** You cannot use components that use a table-validated value set containing the $PROFILES$ or $FLEX$ nomenclature. The application will issue a message if you select components that cannot be used.

3. If you selected a mapping component, select the value of the component that belongs to this category.

4. Continue selecting categories or mapping components (or both) to complete your definition of the category.

5. Save your work.

Defining Time Entry Rules

You can use time entry rules in two ways:

- To validate a timecard when it is saved or submitted and display a business message, error or warning. For example, you can check that the employee has not worked more than a specified number of hours per week in the last three weeks.

- To determine which time entries or changes require approval for each application. For example, you can specify that a timecard must be submitted to the Projects approval workflow if the employee enters or changes any of the Projects time data. You can write a formula to define more complex approval rules, such as requiring approval if an employee enters time above a specified level.

Use the Time Entry Rules window.

To define time entry rules:

1. Name the rule.

2. Enter a description for the rule.

3. Select the Usage:

   - Submission is when the completed timecard is submitted for approval.

   - Resubmission is when the timecard has been approved and the employees changes the time or labor data.

   - Submission / Resubmission determines approval is required at the initial submission and when the employee changes the time and labor data after approval.

   - Save is when the worker selects Save on the timecard.

4. Do one of the following:

   - Select a formula and enter formula inputs. You enter the formula inputs in the segments of the OTL Formulas flexfield context that you have created for your formula.

   - Select a mapping, which is a group of timecard fields. This tells the approval process to include the timecard for approval if any of these fields have changed.

5. Enter the desired From date to indicate when this rule becomes effective. You are not required to enter a To date until the rule is no longer needed.

6. If you want to restrict the rule to your current business group, uncheck the Global check box.

7. Save your work.

Defining Time Entry Rule Groups

Once you have defined time entry rules for validation, you can group the rules together and assign a group to a person or a group of people via preferences. Use the Time Entry Rule Groups window.

To define time entry rule groups:

1. Enter the name of the Rule Group.

2. Select the name of the first time entry rule.

   The remaining data fields will populate.

3. Select one of the following outcome rules:

   • Business Message - this writes a message to the timecard at the time of submission but does not stop the timecard submission process.

   • Error - this produces an error on the timecard at the time of submission and stops the submission process until the error is corrected.

   • Warning - this produces a warning message on the timecard indicating a rule has been violated but does not stop the submission process.

4. Repeat steps 2-3 to continue entering time entry rules for this grouping.

5. Save your work.

Approval Styles

Approval Styles Overview

You can define approval styles and associate these styles to a person or a group of people. The two parts to an approval style are:

- Time entry rules, which determine if a timecard requires approval when submitted or resubmitted.

- Approval style components, dictate which approval method to use for data belonging to a particular application

You can specify a sequence in which approvals take place between application. For example, an enterprise may have business rules that dictate projects data is approved prior to payroll data. Alternatively, approval can take place in parallel.

You can designate a single method for approval of a person's time, or use several methods so different applications can approve time in different ways. You can define approval to take place using methods for a given application and time range. The methods are:

- Auto Approve - specifics that time and labor data is pre-approved and no approval will take place. The application notifies the appropriate personnel.

- Person - an explicitly specified person.

- HR Supervisor - the current supervisor of the person, as recorded on the employee's assignment.

- Formula (Selects Mechanism) - the approval process uses the formula identified in the Identifier field.

- Workflow - the approval process uses the workflow identified in the Identifier field.

- Entry Level Approval - the approval process uses the Entry Level Components to determine what entries belong to what approver.

Predefined Approval Styles

There is a predefined approval style that used the auto approve method. This approval style is used in the Default Preferences and Projects Default Preferences.

For Oracle Projects, use the Auto Approve approval style, and set the PA_AutoApprove Timecards profile option to Yes to approve timecards automatically, or No to require the HR Supervisor's approval. You set this option at the responsibility level for System Administrator responsibility, (or whichever responsibility is used to set the profile option) and it applies to all users. If you require other rules for Oracle Projects approvals, consider customizing the Oracle Projects AutoApproval client extension.

See: Using Oracle Projects Client Extensions: page B-6

Projects Default Preferences also has a value in the second field of the Approval Style preference. This field sets the Override Approval Style. In Projects Default Preferences, the value is *Projects Override Approver*, which is a formula.

To enable the override approver functionality you must also ensure that the Enter Override Approver preference is set to Yes. This displays the Override Approver field on the Oracle Projects layout, where a worker can select anyone in the business group.

Workflow Approval Styles

Overview of Workflow Approval Styles

You can define approval styles that uses Oracle Workflow to route timecard to the appropriate person, or people, for approval. There is a simple, predefined workflow that can serve as a template for creating your own workflows for approval. The predefined workflow item type is HXCEMP. This item type contains one process called OTL_APPROVAL_SEEDED_WF, shown in the following diagram.

Workflow Approval Styles
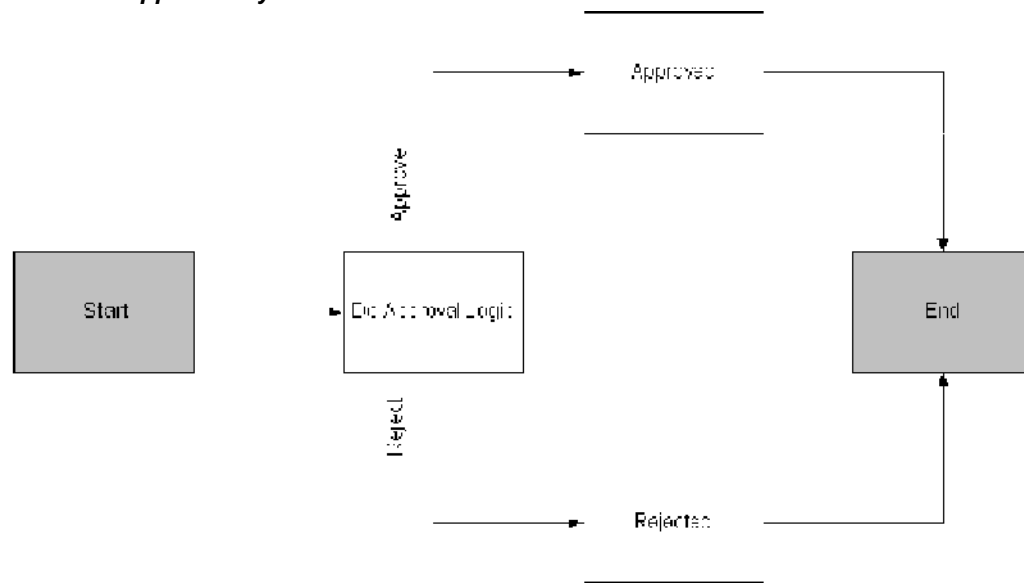
The item type also has two attributes: PARENT_ITEM_TYPE and PARENT_ITEM_KEY. The Do Approval Logic function has a return type of Approval.

There is also a delivered server side package called HXC_SEEDED APPROVAL_WF (in files hcseedaw.pkh and hcseedaw.pkb, in $HXC_TOP/patch/115/sql), which contains the following procedures: do_approval_logic, approved and rejected. The corresponding nodes in the process call each of these procedures. The do_approval_logic procedure currently just returns an approval status of REJECTED. You can copy it and modify the copy to do more complicated processing.

This is how Oracle Time & Labor handles an approval workflow:

- The process Find and Notify Approvers, which is part of the item type HXCEMP, sets the PARENT_ITEM_TYPE attribute to HXCEMP and the PARENT_ITEM_TYPE attribute to the item key of the workflow process in progress.

- It then launches a new workflow process for the item type and process specified in the Approval Styles window, with a new item key (generated from a sequence). In the case of the predefined workflow, the item type is HXCEMP and the process is OTL_APPROVAL_SEEDED_WF.

- The process is executed. It calls the do-approval-logic procedure, which returns APPROVED or REJECTED (the predefined example returns REJECTED). This result determines which procedure is executed next.

- The procedure Rejected sets up the attribute WF_APPROVAL_RESULT (which is an attribute of the parent item type HXCEMP) to be REJECTED. It also sets up the attribute APR_REJ_REASON with a comment ('Rejected by Seeded Workflow'). The procedure Approved does the same thing for APPROVED.

- The HXCEMP workflow is now finished and control is returned to the HXCEMP workflow, in the Find and Notify Approvers process. This process reads the approval result in the WF_APPROVAL_RESULT attribute and finishes approval processing.

Configuring the Predefined Approval Process

First make a copy of the predefined item type and server side package. You can modify your copy of the do_approval_logic procedure, and leave everything else as predefined. You can also modify the hard-coded comments in the procedures Approved and Rejected.

If you want to set up multiple processes, you can create them as part of your copy of the HXCEMP item type. (There is no need to create additional item types, although you can if you want to). Your processes must follow these rules:

- The internal name of the process must begin with OTL_APPROVAL (otherwise your process will not be visible in the Approval Styles window).

- The process must use the parent_item_key and parent_item_type attributes to set up the attribute WF_APPROVAL_RESULT to tbe REJECTEDor APPROVED.

- Similarly, if you want to display comments, the process has to set up the attribute APR_REJ_REASON, in the same way as the predefined package.

Do not change the HXCEMP workflow and its associated server side code.

Defining Approval Styles

By creating approval styles, you can define approval methods for each recipient application You associate approval styles with people using preferences.

Use the Approval Style window.

To define approval styles:

To define approval styles:

1. Enter a unique name for the Approval Style.

   > **Tip:** Use a meaningful name to help you identify the appropriate style when you select it in the Preferences window. For example, you could use a name that identifies the workers to whom it applies, or the method of approval (such as "Supervisor Approval").

2. In the Data Interdependency Rules region, select a time entry rule and an application that uses this rule. The rule determines whether the application sends a timecard for approval when the timecard is submitted or resubmitted.

   > **Note:** The rule you select within the Data Interdependency Rules region, is either one of the predefined Time Entry Rules, or a Time Entry rule you defined previously. Time Entry Rules determine what data entry or changes require approval for a specific application.

3. If the application requires additional rules, select each rule and the application.

4. Repeat steps 2 and 3 for all of the applications.

5. In the Approval Style Components region, select the first application that uses this approval style.

6. If you want to control the sequence in which wach type of approval is performed, enter a sequence number. The approval type with the lowest number is performed first. Two applications with the same sequence will have approval processes run in parallel.

7. Select one of the following types of approval for this application:

   • HR Supervisor - The named supervisor from the workers assignment.

   • Person - A named individual which you can select from the List of Values.

   • Workflow - Used to route timecards to the appropriate person, or people defined within the workflow.

   • Formula (Selects Mechanism) - Uses either the predefined approval formula, or a formula you defined previously.

   • Auto Approve - Timecard is not routed through an approval process.

   • Entry Level Approval - Determines what time entries are routed to what approver.

      Note: If you select Entry Level Approval, see additional setup steps beginning at step 12.

8. In the Identifier field, select:

   • The name of the approver, if you selected Person as the Type

   • The formula, if you selected Formula as the Type

   • The workflow, if you selected Workflow as the Type

   For other types of approval, leave the identifier field blank.

9. Enter the Start Date when each approval rule becomes active. Optionally, enter an end date. You cannot have the same rule for the same application with overlapping dates.

10. Repeat steps 5 to 9 for each application that uses this approval style.

11. Save your work.

    If you selected Entry Level Approval in step 7, continue with the following steps.

12. Choose the Entry Level Approval Components button. The Entry Level Approval Components window displays.

13. Select one of the following Default Entry Level Approval Style:

    • Auto Approve

    • Formula (Selects Mechanism)

    • HR Supervisor

    • Person

- Workflow

14. In the Identifier field, select:

- The name of the approver, if you selected Person as the Type.

- The formula, if you selected Formula (Selects mechanism) as the Type.

- The workflow, if you selected Workflow as the Type.

For other types of approval, leave the Identifier field blank.

15. In the Entry Level Components region, select a Time Category from the list of values.

16. Select the Approval Type you wish to associate with the Time Category.

17. Depending on your selection of Approval Type, you may need to enter the Identifier.

18. If you want to control the sequence in which each type of approval is performed, enter a sequence number. The approval type with the lowest number is performed first. Two applications with the same sequence will have approval processes run in parallel.

19. Repeat steps 16 to 19 for each Time Category that you need for this Entry Level Approval.

20. Save your work, and close the Entry Level Approval Components window.

21. Close the Approval Style window.

Self-Service Line Manager Timecard Entry and Search

Self-Service Line Manager Overview

Line managers can create, edit and submit timecards for an worker, based upon the employees assigned preferences: the manager is acting on behalf of the worker. Line managers can access workers using the supervisor hierarchy, or using the SSHR "My List" function to access workers within their security profile.

This function allows managers to record timecards for absent workers, or workers who may not be available to enter their time before the retrieval cut off date.

Administrative Setup

Oracle Time & Labor Line Manager functionality is available as an added menu function and is delivered as: User Function Name - Timecard Mgr (Function - HXC_TIMECARDS_MGR).

Use the delivered HR Self Service Responsibility/Menu as an example to create a client-defined menu, than can include the Oracle Time & Labor menu function. Use Manager Self-Service V4.0. The responsibility uses the Manager Self Service menu; (menu User Name: Manager Self Service, Menu Name: HR_LINE_MANAGER_ACCESS_V4.0).

Add the OTL Function/Prompt to a company-defined Self Service Menu as: Prompt: Time Entry Function: Timecard Mgr.

> **Note:** Use delivered menus and responsibilities as an example only for configuration. Do not modify delivered menus/responsibilities, to ensure delivered menus/responsibilities update properly in future delivered patches.

Assigning the company defined Self Service Line Manager Responsibility to a User enables Line Manager functionality where a manager can select Time Entry to enter/update timecard information. Selecting Time Entry displays the manager's hierarchy of employees reporting to the manager. The manager can use the Hierarchy list, when entering Timecard information, or can use the sub menu function My List to select additional workers.

The Self Service Line Manager functionality allows the manager to see a list of workers displayed in a hierarchy, where the manager can expand the list to see workers reporting to the manager's direct reports. The manager can also use the 'My List' sub menu option to select workers that are not shown in the manager's hierarchy.

A Line Manger can also enter their own timecard information. When the 'My List' sub menu is enabled for a manager, the security profile 'Exclude User' may be used to restrict managers from entering their own timecard information. When the Manger DOES NOT have access to the 'My List' sub menu, then the security profile 'Exclude User ' is NOT taken into account, and therefore the Manager can enter his/her own timecard.

The manager may be limited from entering their own timecard information through line manager functionality by setting an additional parameter on the Timecard Mgr function (Function - HXC_TIMECARDS_MGR). To limit the manager from entering their own data, the parameter - pManagerEnabled is entered at the end of other parameters (connector is &) with an N being 'Not Enabled', and a Y equaling 'Enabled'.

As an example - to disable Line Manger entry of their own time using the Line Manger functionality, the parameter is added as: &pManagerEnabled=N

Search Options

Various search options are available, such as searching for workers using the supervisor hierarchy, or search using employee criteria such as first, and last name, employee number, start date, assignment category, and social security number.

To search for workers using the supervisor hierarchy, you select the desired employee name as it appears within the hierarchy. If a worker does not appear within your hierarchy, you can use My List to search for other workers to whom you have access. Access to other workers is determined by your security profile menu option indicating limited timecard search or superuser timecard search.

You can use My List to add new workers to your list, view their details, or select a worker to process. You may use an advance search, or search on basic search criteria such as Last and First Name, and the person type that you wish to include in this search. Once the search data is returned, you can select individual workers to add to My List.

Time Entry

Form the Time Entry page, you can update, delete or view details for a worker. You can choose to import or create a new timecard for a worker from the Time Entry page. The workers preferences determines the appearance of the timecard, and not the preferences of the manager entering the time. Once time entries are complete, you can submit the timecard, and the approval process will proceed as determined within the assigned preferences.

Line managers will be able to enter their own timecard using their line manager function. However, this can be restricted if you do not wish to give the line manager this accessibility.

Contingent workers can act as a self-service line manager and preform the same functions as defined in this section.

Change and Late Audit

Overview of Change and Late Audit

Change and Late audit enables you to track all changes to new timecard, as well as previously saved and submitted timecards. These changes include modifying a saved or submitted timecard and saving timecards after a defined due date. For example, you may wish to have workers enter a reason why they changed their hours worked on Monday from 8 to 10, or why an hours type was changed to vacation.

You cannot delete timecards or line items on a timecard when using Change and Late Audit. However, if you wish to "delete" a line item from the timecard, you enter zero (0) in the hours field. This creates a change record and requires a change reason. Deleting timecards and line items from a timecard eliminates accurate audit trails.

When using the Change and Late feature, the Audit Information page will automatically appear after a worker selects Review from the time entry page. The Audit Information page requires the worker to enter a reason code for each day of the modified timecard. You may also enter a comment to correspond with the changes made to each line item.

You can use these audit rules to help your company address requirements for the US Defense Contractor Audit Agency (DCAA). This feature is option, and is not required set up for Oracle Time & Labor.

Change and Late Audit has a default Change and Late Audit preference node. To enable the preference node, assign a preference eligibility criteria. The preference node enables Change and Late Audit to track reasons for all entries made on the self-service timecards.

> **Note:** User entries made in the OTL Self-Service pages will not display within Timekeeper forms

> **Note:** You can use Change and Late Audit in your own timecard layouts.

The Audit Summary window, used in the Change and Late Audit Flow, is configurable using an ldt file. This will allows you to use the audit rules for any entity and show that same entity on the Audit Summary window.

After you configure the Audit window, you can specify the window within the Timecard Layout Preferences.

> **Note:** For additional information on configuring the Audit Summary window, please refer to the Oracle Time & Labor Configurable UI Whitepaper.

Change Audit

Change audit records when a worker makes a change to a saved, rejected, or submitted timecard. This change can include, modifying a saved time entry to any field defined by your time categories.

Late Audit

You can define what determines a late entry on the timecard. By default, an entry is late when the entry stop date/time us 24 hours prior to the current

date/time. However, using time entry rules, you can define late by start-stop hours, or by the quantity of hours (that an entry misses the deadline).

Reason Code Lookups

Oracle Time & Labor provides new lookup types for the change and late audit features:

- HXC_CHANGE_AUDIT_REASONS - This lookup type provides user-defined reason codes for the audit type of change.

- HXC_LATE_AUDIT_REASONS - This lookup type provides user-defined reason codes for the audit type of late.

Oracle does not deliver any predefined values for change and late audit reasons, however you can define as many reasons you need, and limit the values you enable within your list of values.

Time Categories

A Time Category is a group of mapping components that can appear on a timecard, such as elements, projects, or tasks, with one or more specific values for each component. You may audit specific projects, by listing specific project codes in the defined time category, or any project by defining a time category with no specific projects. You can define any number of time categories to determine what fields to audit for change and late entries. See: Defining Time Categories.

For example, you may choose to audit entries that have changes, or additional entries added to a specific project or task. By defining time categories, you can monitor these types of changes.

Time Entry Rules

Change and Late Audit Time Entry Rules use formula to control what is defined as late and what field you wish to monitor when a change is made. There are two predefined time entry rules, with predefined formulas:

- Change Rule - CLA Change (Seeded formula)

- Late Rule - CLA Late (Seeded formula)

You can define a time category for CLA Change (Seeded formula) and require a worker to enter a reason why changes are being made to a specific file on the timecard as explained with time categories.

For example, you may define a change audit rule to enforce a reason to be entered if any changes are made on the timecard against Project A. To accomplish this change audit rule, you will create a time category for Project A, and define a Change Audit Time Entry Rule with the time category input value equal to the newly defined time category, and assign this time entry rule to a rule group. You can then assign the time entry rule group to a person or group of people via the Change and Late Audit (CLA) preference. Workers who submit timecards with entries for Project A, and then make a change, the change audit rule initiates and the worker must enter a valid reason for making this change.

> **Note:** CLA Late (Seeded formula) requires input values for Start-Stop Late Hours and Quantity Hours. Time category is an optional input value and is not required.

Preferences

In Oracle Time & Labor you set preferences to define many of the rule about how individual workers or groups of workers can use the application. There are rules for the time store, and rules about Self Service timecard entry. You can choose which preferences workers can see, and which ones they can edit.

Oracle Time & Labor includes default preferences with predefined values. These cannot be change or deleted. For more information on assigning preferences, please refer to the Preference chapter within this Implementation Guide.

There is a new preference node within the preference hierarchy entitled Change and Late Audit (CLA). Here, you can assign your change and late audit rule. The Change and Late Audit preferences are:

- Delete Timecards - allows you to remove the option for a worker to delete a timecard when using change and late audit. This entry must be No for change and late audit.

- Layouts - Projects is the predefined timecard layout for change and late audit. However, you can configure other layouts as needed.

- Process Flow - control the page flow in self-service. If set to audit, the flow of the self-service timecard differs from that of standard flow.

- Rule Group - determines your time entry rule group that you can assign to a person or a group of people.

Process Flow

The process flow for change and late audit timecards varies from the standard flow of timecards. In the example below, you will see the differences for change and late audit.

Process Flow
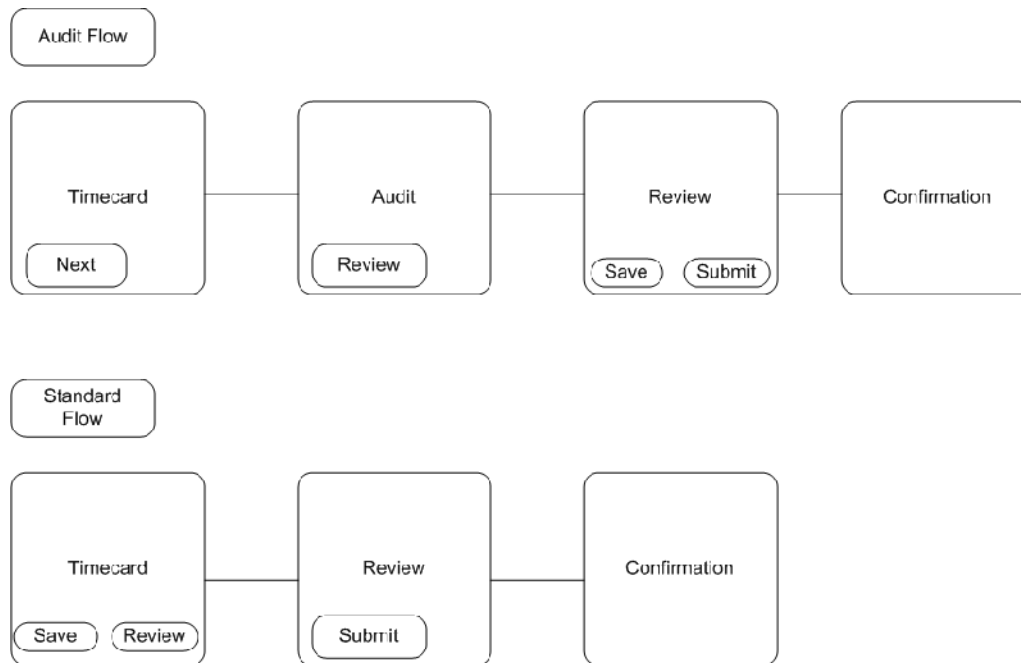
Defining Reason Code Lookups for Change and Late Audit

You can define reason code lookups for Change and Late Audit to provide user defined reason codes for the audit type of change and late. You can define as many reason code lookups as needed, and limit the values displayed in the list of values.

Use the Application Utilities Lookups window, using the HRMS Manager responsibility.

To define reason code lookups:

1. Query the audit type lookup you wish to define; HXC_Change_Audit_Reasons, or HXC_Late_Audit_Reasons.

2. Enter a code for the audit reason. For example, you may wish to have a code of MGR for Manager Request.

3. Enter a meaning for the code, for example Manager Request for the code of MGR.

4. You may enter a description for the code, such as Manager requested change.

5. Skip the Tag field. This is not used for Change and Late Audit Reason Lookups.

6. Enter your effective date from date.

7. Select Enable to display the lookup in the list of values. If you leave the enable check box blank, the code will not display.

8. Continue to define reason code lookups for this audit type.

9. Save your work.

10. Query your next audit type lookup and follow steps 2 - 8.

11. Save your work.

Defining Time Entry Rule Groups for Change and Late Audit

Once you have defined time entry rules for change and late audit, you can group the rules together and assign a group to a person or a group of people via preferences. Use the Time Entry Rule Groups window.

To define time entry rule groups:

1. Enter the name of the Rule Group.

2. Select the name of the first time entry rule.

   The remaining data fields will populate.

3. Select Reason as the outcome rule.

4. Repeat steps 2-3 to continue entering time entry rules for this grouping.

5. Save your work.

Defining Time Categories for Change and Late Audit

A time category is a group of mapping components that can appear on a timecard. You can define any number of time categories to determine what fields to audit for change and late entries.

Use the Time Categories window.

To define time categories:

1. Enter a unique name for the category.

2. Select OR as the operator.

3. Select either an existing time category or a mapping component to define the category.

4. If you selected a mapping component, select Specify Value, if you wish to define a specific value of the component.

5. Enter the value of the component that belongs to this category.

6. Continue to select categories or mapping components to complete your definition of the category.

7. Save your work.

Defining Time Entry Rules for Change and Late Audit

Time entry rules use formulas to control what is defined as late and what fields you wish to monitor when a change is made. There are two predefined time entry rules, with predefined formulas. However, you can create your own time entry rules, using the predefined formulas, or using newly created time categories.

Reminder: When entering formula inputs, white fields are optional entry, and yellow fields are required entry.

Use the Time Entry Rules window.

To define time entry rules:

1. Name the rule.

2. Enter a description for the rule.

3. Select the Usage:

   • Audit is when the worker selects the next button from the timecard page.

   • Submission is when the completed timecard is submitted.

   • Save is when the timecard is saved.

   • Resubmission is when the timecard has been submitted and the employees changes the time or labor data.

   • Submission/Resubmission is at the initial submission and when the employee changes the time and labor data after submission.

4. Do one or both of the following:

   • Select the formula for CLA Change (Seeded Formula) and enter your formula inputs, such as your previously defined time category.

   • Select the formula for CLA Late (Seeded Formula) and enter your formula inputs, such as time category (optional), Start-Stop Late Hours (required), and Quantity Hours (required).

5. Enter the desired From date to indicate when this rule becomes effective. You are not required to enter a To date until the rule is no longer needed.

6. If you want to restrict the rule to your current business group, uncheck the Global check box.

7. Save your work.

7

Self-Service Timecard Configuration

Timecard Configuration for Self-Service

You can assign timecard layouts to your workers and configure the look and feel of each timecard layout for each individual worker or a group of workers.

How do workers enter their time using Oracle Time & Labor

Workers use a self-service web page in the format of a timecard, You can create different timecard layouts for each group of workers so that they only see the fields that are relevant to them. You can rearrange the fields on the layouts, edit the list of values, and rewrite the instruction text to make is easy for your workers to fill out their timecard quickly and accurately.

Workers on the move can enter their time and labor data in a spreadsheet and upload it later to the application.

Workers can also use other entry devices such as time clocks, telephones, or legacy entry systems. You can easily enter this data into Oracle Time & Labor using the robust timecard API.

Can Oracle Time & Labor assist traveling staff view valid projects and tasks?

When you save a template as a spreadsheet, you can enter your time for the week into it. You can add or update existing line items. You can also view the valid list of projects and the associated task by scrolling down within the spreadsheet. This allows you to select and enter the correct project and task information on the exported timecard.

Timecard Layouts

Overview of Timecard Layouts

You assign timecard layouts to your workers using the Timecard Layout preference. The layout determines the fields that they can enter, how the fields are arranged on the page, and the instruction text that they see. You can define as many layout styles as you require. For each layout style, you need several specific layouts:

- Timecard Layout, for time entry

- Review Layout, for reviewing entries before submitting them

  For employees with the OTL Rules Evaluation preference set to Yes, this layout can also display the details of overtime, double time, and so on, calculated by applying the OTLR rules from time management structures and policies.

- Confirmation Layout, which displays entries after submission

- Detail Layout (optional), which you can provide for Projects users or any other layout that requires a Detail page (accessed from the Detail button on the Timecard page). On the predefined Projects layout, the Detail page is for entering comments and other information against each row displayed on the timecard.

- Export Layout (optional), for exporting data to a spreadsheet. If you do not specify an Export layout, the Timecard layout is used for export. There is a predefined Export layout for Projects, which displays a Comment column for recording comments against each day of the week.

Several layout styles are predefined. You can use these as supplied, or copy and modify them. For example, you might modify a layout to remove a field that you don't use. For instructions on modifying layouts, refer to the white paper "Oracle Time & Labor Timecard Configuration", which is available on Metalink.

> **Important:** Do not use Web Application Dictionary or the OA Configuration Framework to configure the layouts.

Predefined Layout Styles

The predefined layout styles are:

- Projects layout

  Using this layout, workers can enter their time against a selected project, task, and type. They can click on a Details button to enter comments against each project, task, and type combination.

- Payroll Layout

  Using this layout workers can enter a start and stop time, or a number of hours, for each day of the week for the selected hours type. This layout is suitable for workers who are submitting their time to Oracle HR or Payroll.

- Projects with Payroll Layout

  This layout is similar to the Projects layout except that the list of values for the Type field comes from the alternate name you have assigned to the worker (using preferences) for the Expenditure Elements alternate name type. So when a worker selects a type for a time entry, an element name is also recorded in the time store.

- Exception Layout

  This layout displays one row where the worker can select an hours type and cost center, then enter the number of hours for each day of the week. Use this layout for workers who only need to submit timecards for exception reporting (such as time absent for sickness or vacation).

Displaying OTLR Details in Self-Service

If you want workers to be able to review OTLR time details--such as hours of overtime, derived from their earnings policy--on their Self-Service timecard, you must ensure you complete the following setup:

- Set the value of the OTL Rules Evaluation preference to Yes for these workers

- Assign them to time management structures and policies, including a rotation plan and earnings policy

- Set Autogen to Yes on the Assignment Time Information window

- In the Timecard Layout preference, assign a Review layout--and optionally a Confirmation layout--that includes an OTLR Details section. For example, you could use the predefined layouts *Exception OTLR Details Review Layout* or *Payroll OTLR Details Review Layout*. There is no predefined layout for confirmation. If you define your own layout, follow the instructions in the white paper "Oracle Time & Labor Timecard Configuration" (available on Metalink).

There are two situations where the OTLR Details displayed in self-service may be misleading. Consider whether these circumstances apply to your implementation. If they do, you might prefer not to show OTLR Details in self-service, which you can do by using a review layout that does not include OTLR Details. The circumstances are:

- If the worker's OTL self-service timecard period (set by a preference) is not the same as their payroll period, and their assigned earnings policy is weekly or special, the OTLR Details displayed in self-service may not show what the user expects. The rules are applied on a payroll period basis.

  For example, suppose the timecard period is weekly, starts Sunday, and the payroll period is weekly, starts Thursday. The earnings policy includes the special policy that all hours worked on the seventh consecutive work day are paid as overtime. If employees enter seven consecutive work days (Sunday through Monday), they may expect to see the seventh day showing as overtime on the Details section of the OTLR Review page. However, the application counts seven days from the beginning of the payroll period (Thursday) and therefore does not display Monday as overtime.

- If time entries have been transferred to the professional forms Timecard window using the Transfer Time from OTL to BEE process and then the user changes the timecard in self-service, the OTLR Details displayed in self-service will be the old transferred details. They will not reflect the changes the user has made.

Using Preferences to Configure the Timecard Look and Feel

You can make a number of changes to the appearance of a timecard using preferences:

- Set the *Enter Override Approver* preference to Yes to display the Override Approver field.

- Set the *Date Formats* preference to determine the format of the date fields for period list, table day header, and detail page header on the timecard.

- Use the *Number of Empty Rows on the Timecard* preference to determine the number of rows displayed by default (the worker can always add more rows as required)

- Set the *Self Service Template Functionality for a Worker* preference to Yes to display a Template field on the timecard, where workers can select an existing template to use.

- Set *Save as Template on Timecard* to Yes to display the Save As A Template button and the Template Name field.

  Note: You must also set *Self Service Template Functionality for a Worker* to Yes.

- Set the *Timecard Period* preference to define which day of the week appears first on the timecard (for example, Sunday or Monday)

List of Values

You can configure the lists of values that display on fields of the timecard by defining alternate names. Use this feature to provide more user-friendly names, or to restrict the values in a list, or to derive the value of another field from the value a user selects on a field displayed on the timecard. See: Alternate Names, page 7- 8 .

If you use any of the predefined layouts (except the Projects Layout), you must define alternate names and select values for the *Timecard Alternate Names* preference.

To configure lists of values for project, task, type, and overriding approver on the Projects layout, see Appendix B Oracle Projects Integration Notes., page B- 1

Totals on Summary Pages

On the timecard summary and approval summary pages, you can displays totals for categories of time (such as all time for a particular project, or all regular time). To help you do this, there are several predefined time categories (Total1 through Total10). These categories are supplied empty so that you can select the mapping components and subcategories you want to sum to provide totals. See:Defining Time Categories, page 6-14

On the predefined timecard layouts, Total1 and Total2 are displayed on the timecard summary page, and Total2 and Total3 are displayed on the approval summary page. The field labels used on these layouts are shown in the table below. To change the field labels to describe the totals you want to display, update the attributes listed in this table.

For example, if you want Total1 to display the total hours worked on Project X and Project Y, you would:

. Update the Total1 time category to include the mapping component PA Project Id set to the appropriate values for these projects.

. Update the HXC_HOURSTYPE_REGULAR_LABEL attribute in the HXC_CUI_TIMECARD region to be "Projects X and Y" instead of "Regular".

Totals on Timecard Summary Page

Field	Time Category	Seeded Prompt	AK Region	Attribute Code	Attribute Name
TS - First Column	Total1	Regular	HXC_CUI_TIMECARD	HXC_HOURS-TYPE_REGULAR_LABEL	Timecard Hours Type Regular Label
TS - Second Column	Total2	Premium	HXC_CUI_TIMECARD	OVERTIME_HOURS_TYPE_LABEL	Timecard Hours Type Overtime Label

Totals on Approval Summary Page

Field	Time Category	Seeded Prompt	AK Region	Attribute Code	Attribute Name
AS - First Column	[none]	Total Hours	--	--	--
AS - Second Column	Total2	Premium	HXCSEARCH-RESULTSLIST	HXCPREMIUMHRS	Hxc Premium Hours
AS - Third Column	Total3	Non worked hours	HXCSEARCH-RESULTSLIST	HXCNONWRKHRS	Hxc Non Worked Hours

Timecard Templates

Overview of Timecard Templates

A template stores timecard data for reuse. For example, you might define a holiday template for a weekly timecard that records zero hours worked and 40 hours taken as vacation. Each template is associated with a timecard layout.

By using a template, users avoid repetitive and error-prone data entry. They can focus on exception entry of any time that is different from their expected working pattern, by simply correcting any entries that need to change, and adding new entries.

Using preferences, you can control users' access to templates and their ability to create templates. For example, you can remove all access to templates by setting the *Self Service Template Functionality for a Worker* preference to No.

Oracle Time & Labor offers two types of templates:

- Dynamic

- Private

Dynamic Templates

Dynamic templates are predefined and delivered with the product. The data they contain is dynamically drawn from another source when the user selects the template. However, to the user, they appear the same as public templates. Like other templates, a dynamic template can be selected by the user or can appear automatically if it is the user's default template (specified using preferences).

The dynamic templates are:

- **Project Assignments** - This template generates time and labor entries from the project, type, and hours information held in Oracle Project Resource Management for the worker's assignments.

  You can only use this template if you have licensed and implemented Oracle Project Resource Management. See: *Oracle Project Resource Management Implementation and Administration Guide.*

- **Work Schedule** - This template generates time and labor entries from the worker's assignment to a rotation plan, holiday calendar, and earning policy.

  To enable workers to use this template, they must have:

  - The *Autogen Hours* field set to Yes in the Assignment Time Information window for their assignments, and

  - The preference *OTL Rules Evaluation* set to Yes, with HR or Payroll selected in the Approval Rules for Rules Evaluation segment of this preference.

- **Last Period Timecard** - This template uses the previous time entry data. This template would most likely be used when an employee is working on the same projects week after week, eliminating the need for repetitive entry of project and task numbers.

You can use a preferences to specify which template appears as a default (using the *Self Service Default Template Assigned by Sys Admin* preference). Users can select a new default themselves (using the *Self Service Default Template Selected by User* preference).

Private Templates

You can grant some or all of your users the ability to create their own templates, using preferences. There are two ways to create a template:

- Once you enter and submit a timecard, you can save that timecard as a template. To do this, choose the option to Create a Template from Timecard. This opens the template form where you name the template and choose the desired timecard period from previously submitted timecards.

- Create a new template from scratch. To do this, you choose Create New Template. This will open the template form where you name the template and enter the details for each of the seven days of the week.

You enable a user to create templates on the Template page by setting the preference *Self Service Create Template Functionality* to Yes, and you can display the Save As A Template button on a user's timecard by setting the preference *Self Service Save As Template Functionality on Timecard* to Yes. You can enable a user to append one template to another by setting the *Self Service Functionality to Append Template on the Timecard* preference to Yes. A worker with this functionality can use data from two templates on one timecard: the rows from the second template are appended to the rows from the first. For example, if workers end a project mid-week, they can use their "project" template for the first part of the week and their unassigned to project" template for the rest of the week.

> **Note:** The preferences described above only work if you also set the *Self Service Template Functionality for a Worker* preference to Yes.

Alternate Names

Overview of Alternate Names

Using alternate names you can configure lists of values on a timecard layout. You then associate alternate names with a person or a group of people using preferences.

There are two ways to configure lists of values on a timecard:

- You can rename the values displayed in a list of values. For example, you may wish to change the element name Regular_Earnings_PKW to display on the timecard as Regular Pay.

- You can limit the display of values in a list of values for a specific field on a specific timecard. This makes it easier for users to complete their timecards accurately since they only see the locations, projects, tasks, elements, and expenditure types that are relevant to their work. For example, you might wish to display all elements to timecard users at location A but restrict the element list of values to regular pay and vacation at location B.

If the only configuration you require is to replace element names with element reporting names, you do not need to define alternate names manually. Instead, you can run the Generate Flexfield and Mapping Information process for an element set to create two alternate name definitions-one where all the alternate names are enabled and the other with the names disabled.

To configure lists of values for project, task, type, and overriding approver on the Projects layout, see Appendix B Oracle Projects Integration Notes., page B- 1

Using Alternate Names to Derive Field Values

You can also use alternate names to derive the value of a field from the value a user selects in another field. For example, you can derive the expenditure type from the element (Hours Type) that the user selects on the Timecard. In this way, expenditure type is held in the time store and can be passed to other applications, but it is not displayed on the Timecard.

Another example would be to derive the appropriate costing account from the Hours Type. You could create alternate names to associate the element "Regular" to the Cost Allocation key flexfield value "GL Acc1" and "Vacation" to "GL Acc2". Then time entries are automatically sent to the appropriate cost center without workers entering this information manually.

Alternate Name Context Values

For each field on a timecard, you can select and rename the valid values using one of the following predefined context values:

- ELEMENTS_EXPENDITURE_SLF

- EXPENDITURE_ELEMENTS

- EXPENDITURE_TYPES

- LOCATIONS

- PAYROLL_ELEMENTS

- PROJECTS

- TASKS

You can create additional context values by configuring the OTL Alternate Names descriptive flexfield. The reason you might want to do this is to configure lists of values for any new fields you have created for the timecard.

Timecard Alternate Names Preferences

Use this preference (*Self-Service timecard alternate name set defined for a user*) to assign up to ten alternate names to a worker or group of workers. If you update the preference in the middle of a timecard period, or if workers' assignments change mid-period so they become eligible for a different set of alternate names, they will see both sets of alternate names (old and new) for that timecard period only.

Predefined Timecard Layouts

If you use any of the predefined timecard layouts (except the Projects layout), you must define alternate names and select them in the Timecard Alternate Names preference for the workers who use these layouts.

Defining Alternate Names to Configure List of Values

You can define an alternate name for a specific value in the list of values for any field on the timecard. You can use this feature to restrict a list of values to the entries that are applicable to a user or group of users and to name the entries in the way most meaningful to this user group. You can also use this feature to define combinations of two or more fields where the user selects a value in one field and the application automatically derives the values for the other fields. When defining Alternate Names, use caution to ensure you do not include elements within the alternate names that may not be linked to the person or group of people you are assigning the set. For example, an worker may have the element vacation pay in his alternate name set, but if that element is only linked to a payroll other than the one the worker is a member of, the worker will not see vacation pay in the list of values on the timecard.

If you do not define any alternate names for a field's list of values, the full list of elements from the element set used in the Generate FlexField Mapping process displays by default. The Alternate Name set created is named {Element Set Name} - Enabled.

If you want to restrict the list, you must create an alternate name for every value you want to display in the list. The alternate name can be the same as the existing name, or a new name that is more meaningful to the users of the timecard you are configuring.

Use the Alternate Names window.

To define alternate names:

1. Enter a unique Alternate Name Definition.

2. Enter a description of the name definition.

3. Select the Alternate Name Type to determine which list of values to display. For example, select Payroll Elements to configure the list of elements displayed, or select Expenditure Elements to also derive expenditure type from the element field.

> **Note:** The Alternate Name Types are the context field values for the OTL Alternate Names descriptive flexfield. Some contexts are predefined. You can create a new context for this flexfield if you add a new field to the timecard and you want to configure the list of values for this field. You can also create a new context to create new field combinations where one or more fields are derived from the value a user selects in another field.

4. Save your work before continuing to the Alternate Name Values region.

5. Enter the Alternate Name. This is the name you wish to see in the list of values for the specified field and timecard. For example, if you are configuring the element context, this is the value to display in the Hours Type field.

6. Enter the From and To dates to define the period of validity of the Alternate Name.

7. Move to the Values field. The OTL Alternate Names window opens and displays the segments for the alternate name type.

8. Click on the list of values icon to see the default list of values for a segment. For example, if you are configuring payroll elements, you can see the elements in your element set.

9. Select the value you want to store in the time store using your new alternate name and choose OK.

10. If the alternate name type you selected supports deriving the value of other fields from the field you are configuring, select the values to be derived. For example, if you selected Expenditure Elements as the alternate name type, you could select the element Time Entry Wages and associate it with the expenditure type Regular Billable. This means that when a timecard user selects Time Entry Wages, Oracle Time & Labor automatically stores Regular Billable as the expenditure type.

11. Select the Enabled check box to display the alternate name in the List of Values.

    If you do not wish the alternate name to be seen, do not select the Enabled check box. For example, if you wish to create an alternate name to be used at a later date, do not select the Enabled check box until you are ready to use this alternate name.

12. Repeat steps 5-11 until all alternate names are defined for this list of values.

13. Save your work.

Remember to select your new alternate name definition in the preference Timecard Alternate Names to link it with the workers who should see these names.

Displaying the Projects Detail Page

Using the predefined Projects layout style, you can display a Details button on the timecard layout. This button opens a Details page for entering comments and other information against each row displayed on the timecard.

The fields displayed on the Details page are determined by the segments you have created in the Projects Expenditure Items descriptive flexfield.

To display a Details page for projects:

1. In the Descriptive Flexfield Segments window, query the Expenditure Items flexfield. Set up this flexfield, making sure you enter either

SYSTEM_LINKAGE_FUNCTION (used for Expenditure Type Class) or EXPENDITURE_TYPE in the Reference Field.

- In the Context Field Values area, enter a line for each Expenditure Type Class or Expenditure Type for which you want to display a context-sensitive field on the Details page.

- In the Segments Summary window, define the segments for the global data element context (these fields appear for every expenditure type) and each context field value.

2. Run the Generate Flexfield and Mapping Information process, making sure you select Yes in the Include Expenditure Items Flexfield field.

   See: Running The Generate Flexfield and Mapping Information Process., page 5- 8

3. Review the contexts and segments that the process generated in the OTL Information Types flexfield. (Notice that the system inserts a prefix before the names that you defined in the Expenditure Items flexfield.) Make sure that the contexts you want to use in Oracle Time & Labor are enabled, and that there is at least one enabled segment for each context.

   > **Note:** Consider making all the segments to appear on the Details page optional, even if they are required in the Expenditure Items flexfield. If the segments are required in the OTL Information Types flexfield, you must enter values for all the instances of the required field on the Details page (each day of the week). You cannot close the page until all the values are entered. If you make these segments optional, there is no validation until the user completes their entry and submits the timecard. Then the entries on the Details page are validated against the Expenditure Items flexfield.

   See: Reviewing the OTL Information Types Segments, page 5- 9

4. Recompile the OTL Information Types flexfield.

5. Select a Details page layout in the Details Page segment of the Timecard Layout preference for your Projects workers.

Entry Level Process

Overview of Entry Level Process

Entry Level Processing allows you to capture data for multiple applications in one timecard. You use rules to specify which data is optional and which data is required by each recipient application. For instance Oracle Projects always requires that a timecard includes project, task, and type information. Without enabling Entry Level Processing, even if workers did not work on a project for 4 hours that day, they must enter a project, task, and type information because Oracle Projects validation requires it for project and thus for the timecard. Using Entry Level Processing enabled, you do not have to do that.

With Entry Level Processing enabled, you can specify that if a project is entered, then task and type are also mandatory. But, if only an hours type is entered, project, task, and type are not needed.

Entry level processing allows you to define time categories and time entry rules, to determine which recipient application validates time and labor data entered on the timecard. You may also use the predefined time entry rules and time categories as supplied by Oracle Time & Labor.

Time Categories

You can define time categories to identify which components on a timecard belong to which recipient application. Predefined categories include: Projects Processing Fields, Payroll Processing Fields, and HR Processing Fields. Time categories work in conjunction with time entry rules to control which time and labor data on the timecard is validated by which recipient application.

For example, the projects processing fields time category includes PA Task ID, PA Project, and PA expenditure, and are all linked by the "OR" operator. If a worker enters hours and task on the timecard, the projects validation is activated, and a message is returned to the worker indicating a project and expenditure type are also required.

Note: If you define a time category that does not include any one of the fields/entry required by a recipient application, there is a chance the time and labor data will not be retrieved by the appropriate application.

See: Defining Time Categories., page 6-14

Time Entry Rules

Time entry rules use formulas to determine whether a rule has been broken by the current timecard. The predefined formula, Entry Level Processing, is used to control what time entry on a timecard belongs to which recipient application. The formula inputs on the entry level processing formula determine what time to associate with a recipient application. The two formula inputs are Time Recipient, and Time Category.

Two predefined field combination formulas allow workers to enter mandatory fields, or mutually exclusive fields further validating the time entry on the timecard. The predefined combination formulas are, Mandatory Timecard Fields (Seeded Formula), and Invalid Timecard Field Combination (Seeded Formula).

To ensure proper validation, the applications defined within the Time Entry Rules must also match the applications defined within the Application Set. For example, if

you define time entry rules for payroll and projects, and group these rules into one Entry Level Processing Rule Group, your Application Set must also include payroll and projects.

> **Note:** The two field combination formulas are for general time entry rule validation and are added to the Time Entry Rule Group and not the Entry Level Processing Rule Groups.

Entry Level Processing Rule Groups

Once you have defined time entry rules, you define an Entry Level Processing Rule Groups and assign a group to a person or group of people via preferences. To associate time and labor data on a timecard with more than one application, you group your time entry rules to one Entry Level Processing Rule Groups.

Defining Time Categories for Entry Level Processing

You can define time categories to identify what components on a timecard belong to which recipient application. For example, the projects processing fields time category includes PA Task ID, PA Project, and PA expenditure, and are all linked by the "OR" operator. The time category rule is satisfied when a line on the timecard includes a project, or task, or an expenditure type.

The following categories are predefined for entry level processing: Projects Processing Fields, Payroll Processing Fields, and HR Processing Fields

Use the Time Categories window.

To define time categories:

1. Enter a unique name for the category.

2. Select the operator for this category.

3. Select either an existing time category or a mapping component to define the category.

    > **Note:** You cannot use components that use a table-validated value set containing the $PROFILES$ or $FLEX$ nomenclature. The application will issue a message if you select components that cannot be used.

4. If you selected a mapping component, select the value of the component that belongs to this category.

5. Continue selecting categories or mapping components (or both) to complete your definition of the category.

6. Save your work.

Defining Time Entry Rules for Entry Level Processing

Entry level processing time entry rules are defined to determine the recipient application and the time category for validation on the timecard. You can choose the point of validation to be at the time of submission, resubmission, save, or submission/resubmission.

Use the Time Entry Rules window.

To define time entry rules:

1. Name the rule.

2. Enter a description for the rule.

3. Select the Usage:

    • Submission is when the completed timecard is submitted for approval.

    • Resubmission is when the timecard has been approved and the employees changes the time or labor data.

    • Submission/Resubmission determines validation is required at the initial submission and when the employee changes the time and labor data after approval.

    • Save determines validation is required at the time the timecard is saved.

4. Select a formula and enter the formula inputs for the recipient application and the time category.

5. Enter the desired From date to indicate when this rule becomes effective. You are not required to enter a To date until the rule is no longer needed.

6. If you want to restrict the rule to your current business group, uncheck the Global check box.

7. Save your work.

Defining Entry Level Processing Time Entry Rule Groups

Once you have defined time entry rules for entry level processing, you can group the rules together and assign a group to a person or a group of people via preferences. Use the Time Entry PTE Rule Groups window.

To define entry level time entry rule groups:

1. Enter the name of the Rule Group.

2. Select the name of the first time entry rule.

    The remaining data fields will populate, including the outcome of Process Time Entry.

3. Repeat step 2 to continue entering time entry rules for this grouping.

4. Save your work.

8

Preferences

Preferences

In Oracle Time & Labor you set preferences to define many of the rules about how individual workers or groups of workers can use the application.

Can you use the default preferences, or must you create new preferences?

There are rules for the time store, such as which set of applications can retrieve data about a worker's time, and rules about Self Service timecard entry, such as whether the worker can enter a negative number of hours. You can choose which preferences workers can see, and which one they can edit.

Oracle Time & Labor includes default preferences with predefined values. These cannot be changes or deleted. To view the default preferences in the Preference window, you can expand the default preferences hierarchy by clicking on the plus sign.

If you wish for all employees at all location in all organizations to have the same rules you can use the default preferences, or create one new hierarchy containing the preferences for which you want to specify a different value.

Can you set different preferences for different locations?

After creating the preference hierarchies you require, you can assign them to people by creating eligibility rules. You can link to locations, organization, all people, and individual people. You can link to other assignment criteria too, if you use Oracle Human Resources.

Preferences

Overview of Preferences

In Oracle Time & Labor you set preferences to define many of the rules about how individual workers or groups of workers can use the application. There are rules for the time store, such as which set of applications can retrieve data about a worker's time, and rules about Self Service timecard entry, such as whether the worker can enter a negative number of hours. You can choose which preferences workers can see, and which ones they can edit.

Oracle Time & Labor includes default preferences with predefined values. These cannot be changed or deleted. To view the default preferences in the Preferences window, you can expand the default preference hierarchy by clicking on the plus sign.

If you wish for all employees at all locations in all organizations to have the same rules, you can use the default preferences, or create one new hierarchy containing the preferences for which you want to specify a different value. If you need to define separate rules for certain locations or organizations, you can create as many preference hierarchies as you require. For example, you could create one for the Consulting organization, another for the Seattle location, and a third for temporary workers.

Eligibility Rules

After creating the preference hierarchies you require, you assign them to people by creating eligibility rules. You can link to locations, organizations, all people, and individual people. You can link to other assignment criteria too, if you use Oracle Human Resources.

> **Note:** Preference hierarchies and eligibility rules are specific to your current business group.

People can be eligible for more than one hierarchy, so you must define a precedence to each eligibility rule. Using the example given above, consultants based in Seattle are eligible for two preference hierarchies, through their work location and their organization. Suppose that the Consulting preference hierarchy has a higher precedence than the Seattle hierarchy. The application assigns them all the preference values listed for Consulting, and any other preferences values that are listed for Seattle and not found in the Consulting hierarchy. If there are any preferences that are not listed in either of these hierarchies, the application assigns the workers the values given in the default preferences. A predefined eligibility rule links the default preference to all people, with a low precedence so you can override it.

The following table shows an example of defining preferences for a different department within a location which requires various preferences.

Sample Preferences	Value in Default Preferences (Precedence=1)	Value in Location A (Precedence=10)	Value in Department C (Precedence=20)
Disconnected entry	No	No	Yes
Timecard Period	Weekly - Starts Sunday	Weekly - Starts Monday	Weekly--Starts Monday
Enter negative hours	Yes	No	Yes
Business messages	Yes	--	--
Number of recent timecards displayed	5	8	--
Time Store Approval Style	OTL Auto Approve	OTL Supervisor	OTL Supervisor

Using the values in the table, someone working in Department C at Location A would be assigned the following preference values:

- Disconnected entry - Yes
- Timecard Period - Weekly--Starts Monday
- Enter negative hours - Yes
- Business messages - Yes
- Number of recent timecards displayed - 8
- Time Store Approval Style - OTL Supervisor

Preferences Window

There are three tabs on the Preferences window, Preferences, Eligibility Criteria and People.

Use the Preferences tab to maintain preference hierarchies. A preference hierarchy is a collection of defined rules.

Use the Eligibility Criteria tab to define rules that assign preference hierarchies to various levels such as organization, people group, location and person.

Use the People tab to view the rules that currently apply to a person. This tab is view-only.

Default Preferences

Default Preferences Reference

This topic explains the preferences you use to assign rules and options to your workers. It also lists the values that are predefined as default preferences. You can override the defaults by creating new preference hierarchies.

In the Preferences window, you can see the Default Preferences by expanding the Preference Tree node. The Default Preferences node contains several types of preferences:

- Self Service

- Time Store

- Timekeeper

There is also a separate default branch for Oracle Projects.

See also: Enterprise Asset Management Preferences in Oracle Time & Labor: page B-14.

Additionally there are some features that contain default values. You cannot change or delete these values, but you can create new preference values for these features.

> **Note:** The Preference Tree displays nodes in alphabetical order.

Self-Service

The Self Service node contains the predefined preferences of Worker. The Worker preferences relate to functionality directly associated to an individual.

Preference Name in Tree (Preference Name)	Description	Value in Default Preferences Hierarchy	Default Value for Projects
Append Templates on Timecard (Self Service functionality to append templates on the timecard)	Y/N. If set to Yes, the worker can select more than one template and the data from all the selected templates appears on the timecard.	No	Yes
Business Messages (Self Service ability to show a business message	Y/N. If set to Yes, business messages from time entry rule validation are displayed to the worker on the timecard.	Yes	Yes
Create Personal Templates (Self Service create template functionality)	Y/N. If set to Yes, workers can create their own personal timecard templates. A Create Template button is displayed on the Templates page.	No	Yes

Date Formats (Self Service date format functionality)	Determines the display of date formats for the timecard. You can choose the date format for the Period List, Timecard Table Day Header, and Timecard Details Page Day Header	December 31, 2002.Tue, Dec31.Tuesday, December 31, 2002	[None]
Default Aprover (Worker Default Approver)	If the *Enter Override Approver* preference is set to Yes, you can select any supervisor in the business group to be the default value in the Override Approver field.	[None]	[None]
Disconnected Entry (Self Service disconnected entry option for worker)	Import, Import/Export, or None. Determines whether workers can enter time and labor data using a spreadsheet (import) and whether they can download data to the spreadsheet (export).	None	Import/Export
Enter Negative Hours (Self Service ability to enter negative hours)	Y/N. If set to Yes, workers can enter negative hours on their timecard.	No	Yes
Enter Override Approver (Worker Preference to enter an overriding Approver)	Y/N. If set to Yes, workers can enter an override approver on the timecard. You must also set the Override Approval Style segment of the Approval Style preference to Projects Override Approver	No	Yes
Number of Empty Rows on the Timecard (Self Service number of empty rows on the timecard.	The number of empty rows to display on the worker's default timecard.	1	1
Number of Recent Timecards Displayed (Self Service number of recent timecards on Time Entry screen)	The number of previously entered timecards to display.	5	5

OTL Rules Evaluation (Self Service preference to allow Rules Evaluation	Y/N. Set the Evaluate OTL Rules segment to Yes for workers whose time is subject to OTL rules based on a rotation plan and earnings policy. If set to Yes, use the Approval Rules for Rules Evaluation segment to select the applications that approve the data before you can run the Transfer to BEE process. You may also select an Overtime Recurring Period to calculate overtime for non-weekly payrolls.	No	No
Save as Templates on Timecard (Self Service save as template functionality on timecard)	Y/N. If set to Yes, the Save As A Template button displays on the worker's timecard.	No	Yes
Self Service Flow	Audit or Standard. If set to Audit, then you use the Change and Late Audit Preference node. If set to Standard, then you choose not to use Change and Late Audit.	[None]	[None]
Template Assigned Value - Administrator (Self Service Default Template assigned by Sys Admin)	Default template assigned by the system administrator.	[None]	[None]
Template Assigned Value - End User (Self Service Default Template Selected by User)	Default template selected by worker. Check the Editable by User check box if you want workers to be able to select their own default template.	[None]	[None]
Template Functionality (Self Service Template Functionality for a Worker	Y/N. If set to Yes, workers can use templates.	No	Yes
Timecard Alternate Names (Self Service timecard alternate name set defined for a user)	Determines the set of alternate names used to configure lists of values on workers' timecards. You must define Timecard Alternate Names	[None]	[None]

Timecard Delete Allowed	Yes/No. If set to Yes, then you provide workers the ability to delete a timecard. If you select No, then you disable the delete timecard feature.	[None]	[None]
Timecard Layout (self-Service timecard review, and confirmation layout pages for a workers)	Determines which timecard layouts workers use for data entry, review, confirmation, detail page, and for export. If you leave the Export segment blank, the Timecard entry layout is used for export. If using Entry Level Approvals, and to route all approver comments to the worker, you select the Approval Fragment Layout. If using Inline Notifications, you select the appropriate notification layout.	Exception Layout - Time card Entry Page	Projects Timecard Layout
Timecard Period (Self Service timecard period for worker)	Determines which recurring time period workers use for timecard entry	Weekly - Starts Sunday	Weekly - Starts Sunday

Timecard Unit of Measure (Self Service Unit of Measure to be used on a timecard)	Determines the units in which workers enter time and labor data, such as days, hours, pieces, and time units as well as the format for entering time.	Hours HH:mm	Hours HH:mm
Timecard Status Allowing Edits (Self Service timecard status that allows user edits.	Determines which timecards can be edited, according to their status and their data. In the Status Allowing Edits field, select a status: New_Working_Rejected - Workers can only edit timecards that have not been submitted, or are in a working or rejected status. Submitted - Workers can edit new, working, and rejected timecards, plus those that have been submitted. Approvals Initiated - Workers can edit, delete, and resubmit new, working, rejected, and submitted timecards, plus those for which an approval process has been initiated. **Note:** Submitted timecards cannot have been retrieved by a recipient application. Retro - Workers can edit all timecards, including those that have been submitted, approved and processed. Adjustments made at this point would create a Retro Time Adjustment. In the Past Number of Days field, enter the age, in days, of the oldest timecard a worker can edit. Timecards for the period in which this day falls will be editable. In the Future Number of Days field, enter how many days in advance a worker can enter a timecard. For example, if you enter 28, a worker can enter timecards for all periods up to and including the period that includes the 28th day. Note: A Timecard is only editable if it has a status that allows edits AND it is for a timecard period that falls within the date limits set by this preference.	New, Working, rejected Day fields are blank, meaning there is no time limits on entering and editing timecards.	Retro Day fields are blank, meaning there is no time limits on entering and editing timecards.

Time Store

The time store hierarchy contains the preferences that relate to the functionality of the time store and applications.

Preference	Description	Default Value	Default Value for Projects
Application Set (Time Store Application Set) **Note:** To ensure proper set up, your application set values must match those defined for your retrieval rules.	Determines which applications retrieve workers' timecard - you must define at least one application set. Human Resources - Oracle Human Resources Payroll - Oracle Payroll Projects - Oracle Projects HR/Projects - Human Resources and Projects HR/Payroll - Projects and Payroll HR/Payroll/Projects - Human Resources, Payroll and Projects.	Human Resources	Projects
Approval Periods (Time Store Approval Periods)	Determines the approval time periods for each application.	Weekly Periods - Starts Sunday	Weekly Periods - Starts Sunday
Approval Style (Time Store Approval Style)	Determines the approval rules and method for each application.	Auto Approve (no value for Override Approval Style segment)	Auto Approve Project Override Approver (for Override Approval Style segment)
Auditing Requirements (Time Store Audit Requirements)	Determines whether entries will be audited using Change and Late Audit. If Change and Late Audit is selected, then you must enter your Change and Late Audit rules.	[None]	[None]
Entry Level Processing Rule Groups **Note:** To ensure proper set up, your entry level processing rule groups should be defined to include the values defined in your application set, and your retrieval rules.	Defined the entry level processing time entry rules used to validate the workers timecards.	[None]	[None]

Retrieval Rule Groups (Time Store Retrieval Rule Groups) **Note:** To ensure proper set up, you retrieval rules must match those defined for your application set.	Determines the retrieval rules for each recipient application's retrieval process. The retrieval rules define the approval status data must achieve before it can be retrieved. You must define a Retrieval Rule Group. Projects Retrieval Rule Group Payroll Retrieval Rule Group Human Resources Retrieval Rule Group Projects and Payroll Retrieval Rule Group Human Resources and Projects Retrieval Rule Group Human Resources and Payroll Retrieval Rule Group HR, Payroll, and Projects Retrieval Rule Group Note: Ensure that a worker's retrieval rule group does not contain rules for applications that are no in the application set.	Human Resources Retrieval Rule Group	HR, Payroll and Projects Retrieval Rule Group
Timecard Required (Time Store Time required for worker)	Lists any applications that do not require a timecard	[No applications]	[No applications]
Time Entry Rule Groups (Time Store Time Entry Rules)	Defines the time entry rules to be used to validate the worker's timecards	[None]	[None]

Timekeeper

The Timekeeper node contains the predefined preferences for the Timekeeper feature.

Preference Name in Tree (Preference Name)	Description	Value in Default Preferences Hierarchy	Default Value for Projects
Timekeeper Entry - Display Options (Timekeeper Misc Setup Items)	Determines the items to display on the timekeeper page. You can choose to display, In/Out time entries, Person Name, Person Number, Attribute Item Name for detail Information, and Descriptive Flexfields to display	No, Yes, No, [none], and [none], respectively	No, Yes, No, [none], and [none] respectively
Timekeeper Timecard Layout (Timekeeper Layout Attributes)	Determines which columns to display on the Timekeeper Timecard Layout	[None]	[None]

Additional Features with Preferences

The following features have preferences. You cannot change or delete these values, but you can create new preference values for these features.

Change and Late Audit

The Change and Late Audit node contains the predefined preferences for Change and Late Audit functionality. You cannot change or delete these values, but you can create new preference values.

Preference Name in Tree (Preference Name)	Description	Value in Default Preferences Hierarchy	Default Value for Projects
CLA - Delete Timecards (Timecard Delete Allowed)	Determines whether you will allow workers to delete their timecards. This value must be set at No when using change and late audit	No	No
CLA - Layout (Self-Service Timecard, Review and Confirmation Layout pages for a worker)	Determines which timecard layouts workers use for data entry, review, confirmation, detail page, export and audit. If you leave the export segment blank, the Timecard entry layout is used for export.	Projects layout is defaulted for all values except Export. Export is [None]	Projects layout is defaulted for all values except Export. Export is [None]
CLA - Process Flow (Self Service Flow)	Determines which process flow is to be used during time entry	Audit	Audit
CLA - Rule Group (Time Store Audit Requirements)	Defines the time entry rules to be used to validate workers timecards	[None]	[None]

Defining Preferences

Oracle Time & Labor delivers predefined default preferences. To view the predefined default preferences, expand the Default Preference hierarchy. Then you can decide if you need to create additional preferences. You cannot change or delete the default preferences. You can create new preference hierarchies as needed.

For example, there may be a circumstance where you wish to limit preferences based upon an organization, a location, or even for one individual person. By creating new hierarchies, you can define your preferences for these circumstances.

This procedure covers the definition of preferences only. To assign preferences, see: Defining Eligibility Criteria., page 8-13

Use the Preferences window to define preferences.

to create a new branch in the Preference tree:

1. In the Preferences window, right mouse click on Preference Tree node and select New.

2. Enter the branch name in the Name in Tree field.

3. Save your work.

4. Close the Preference Tree node and reopen to view the new branch.

To add preferences to a branch:

1. Select the node to which you want to add preferences, right mouse click, and select New.

2. In the Name in Tree field, enter a name for the preference.

This name can reflect the value you are going to select. For example, if you are going to select the value HRMS for the Time Store Application Set preference, you might use the name HRMS Application Set.

3. Save your work and select your new preference in the tree by selecting the node's name.

4. Select a value in the Preference field. The corresponding preference values flexfield displays.

5. Select the preference value(s) and choose OK.

6. Select the Editable by user check box if you wish to allow the employee to edit this preference.

7. Select the Display to user check box if you wish this preference to be seen by the user.

8. Save your work.

9. Repeat steps 1 to 7 to define additional preferences for the branch.

10. Save your work.

> **Note:** The rules region is a view only region. Once you have defined eligibility criteria, this region displays the current rules for each branch.

Defining Eligibility Criteria for Preferences

To define eligibility criteria for preferences, choose the Eligibility Criteria tab on the Preferences window.

To define eligibility criteria:

1. In the Preferences window, choose the Eligibility Criteria tab.

2. Enter a rule name to identify the eligibility criteria that will be tied to the node.

3. Select the node you wish to associate to the rule. This is the branch created on the Preference tab.

4. Select the criteria to Link By, such as organization or location.

5. Select the value to Link To.

The values are dependant upon the selection made in the Link By field. For example, if you select organization in the Link By field, you must select the appropriate organization name in the Link To field.

> **Note:** If you are linking by a key flexfield, the Link To list of values contains values to which there is at least one person assigned. For example, if you have defined a job to which no one is yet assigned, that job does not appear in the list of values.

6. Enter a Precedence. This determines which hierarchy the application uses when a person is eligible for more than one. The value of 1 is the lowest and will be used last. It is recommended that you set your precedence at intervals of 10 so you can add new eligibility rules later, if required.

7. You can choose to enter the Start and End Dates for each Eligibility Criteria Rule.

8. Repeat steps 2-7 to enter eligibility criteria for all hierarchies. You can use a hierarchy in more than one eligibility rule to link it to different groups of people.

9. Save your work.

Viewing People Preferences

Once you have defined all preferences and eligibility criteria, you can view an employee's preferences from the People tab.

This is a view only tab and no changes can be made at this level. If you wish to make changes to an individual's preferences, you must use the Eligibility Criteria tab.

Use the People tab on the Preferences window to view people preferences.

To view people preferences:

1. In the Preference window, choose the People tab.

2. Right click on Employee and choose Find from the menu.

3. Enter the name or employee number of the employee you wish to view, and choose Find.

   All the fields will be populated with this employee's preferences.

4. If you wish to view another employee, repeat steps 2 and 3.

   The top region of the window displays the employee's name and all the preference hierarchies for which the person is currently eligible. The lower region lists the values of the preferences assigned to this person.

9

Assignment Time Information

Assignment Time Information

Using the Assignment Time Information window, you can assign an employee to time management structures and policies.

Can you assign a recurring work schedule to a worker?

Yes, using the Assignment Time Information window, you can assign rotation plans, which are made up of work schedules to a worker. You can also determine if a worker will have a timecard autogenerated, as well as assigning an earning policy, shift differential policy and hour deduction policy.

Entering Assignment Time Information

Use the Assignment Time Information window to assign an employee to a rotation plan and time management policies.

To enter assignment time information:

1. Select the assignment.

2. In the Autogen Hours YN field, select Yes to autogenerate this person's timecard or No to prevent autogeneration. You must select Yes for people who are to use the Work Schedule dynamic template.

3. Select the applicable rotation plan for this person.

4. Select the appropriate earning policy.

5. Optionally, select a shift differential policy.

6. Optionally, select an hour deduction policy.

7. Save your work.

Using the Employee Assignment Information Folder

Use the Employee Assignment Information folder to select a group of employees and view their time information. This information includes the policies, rotation plan, and holiday calendar to which they are assigned, their earnings for overtime cap, and whether hours are automatically generated for them.

To use the employee assignment information folder:

Choose Assignment Time Information from the OTL Time Accounting branch from the navigator.

1. In the Assignments option group, select Current, Past, or Both.

2. You can enter further selection criteria in the folder, such as payroll, business group, organization, earning policy, and other assignment time information.

3. Run the query.

10

Time Entry and Transfer Process

Time Entry and Transfer Process

Time Entry can be accomplished in many different ways. You can use templates, self service timecards, and time management structures and policies to enter time and labor.

Can workers do exception-only time entry?

Yes, you can create a number of templates to provide default time entries that workers just need to edit, review, and submit. For example, there are templates that display the time entries from the previous timecard, or entries based on time management rules, or assignments from Project Resource Management.

How does the application help reduce time entry errors?

Using templates minimizes time entry and therefore helps to reduce errors. Configuring the timecard layouts also helps because you can use field label and values that are meaningful to your workers.

You can create as many time entry rules as you require to validate entries before they are saved or submitted.

Can information such as costing be entered in the web-based timecard?

Yes, costing segments from the Cost Allocation flexfield are available for entry on the Payroll and Exception layout. You can also add these segments to any other layout.

Can you determine if timecards we not passed to the appropriate application?

Yes. Using the Retrieval Error Handling report, you can identify timecards that were not passed to the appropriate application during the retrieval processes.

Time Entry and Transfer Procedures

Overview of Time Entry and Transfer Procedures

Using Self Service, workers can select a timecard template to provide default time and labor data. For example:

- Workers who are assigned to time management structures and policies might use the Work Schedule template, which autogenerates their time based on their rotation plan, and holiday calendar.

- Similarly, people assigned to projects managed through Oracle Project Resource Management might use the PJRM Assignments template so that their project, expenditure type, and hours information is automatically recorded on the timecard.

- Others working in consistent patterns from week to week might use the Last Period Timecard template, so that their entries from the previous timecard are defaulted onto the new timecard.

You can set up any other templates your workers require, and you can set preferences to enable them to create their own templates.

Whichever template is used, the time entry procedures are the same: each worker can edit the defaulted values on the timecard, review the new values, and submit the timecard. Similarly, workers who don't use templates, but make their entries on a blank timecard each time, follow the same procedure: enter values, review them, and submit. The timecard is automatically submitted to an approval process.

Editing Timecards

A worker's ability to edit an existing timecard is controlled by the preference Timecard Status Allowing Edits. Here you can specify whether workers can only edit new, working, and rejected timecards, or can also edit submitted, approved, or even processed timecards. You can further restrict edits using this preference by specifying the age of the oldest timecard a worker can edit. For example, if you specify 7 days for workers on weekly timecards, they will always be able to edit the current timecard and last week's timecard (since 7 days ago falls within the previous timecard period).

The Timecard Status Allowing Edits preference also controls a worker's ability to enter timecards in advance. For example, if you specify a limit of 14 days for workers on weekly timecards, they can enter timecards for this week and the next two weeks, which enables them to submit vacation time in advance.

Transfer to Recipient Applications

When the Self Service timecards are approved, they are ready to be retrieved by the recipient applications that use the data. You can run the following processes:

- Using an Oracle Projects responsibility, you can run *PRC: Transaction Import* to transfer time from OTL to Projects

- Using an HRMS responsibility, you can run *Transfer Time from OTL to BEE* to transfer time to Batch Element Entry, and then to Oracle Human Resources or Oracle Payroll.

  For employees with the OTL Rules Evaluation preference set to Yes, this process does not transfer time directly to BEE. It transfers to the professional forms

Timecard window, where you can review the batch, make corrections, and enter exceptions. Then use the OTLR processes to transfer to BEE and Oracle Projects.

See: Transferring Time and Labor Data From The Timecard Window., page 10-10

> **Important: Attention:** If you do make corrections or enter exceptions in the Timecard window, be aware that the information the employee can see in Self-Service will not be the same as the data transferred to BEE from the Timecard window.

To check the results of these processes, run the Retrieval Error Handling Report.

Exporting and Importing Templates for Disconnected Time Entry

You can record your time when away from the office using a spreadsheet and then upload the spreadsheet into Oracle Time & Labor for review and submission.

> **Note:** The layout used for exporting a timecard is determined by the value of the Export segment of the Timecard Layout preference. Oracle Time & Labor delivers seeded export layouts for each timecard layout. If this segment is blank, the value in the Timecard entry segment is used for export. If this is the case, and the layout contains the Detail button to add comments, then the detail information is not available. To make this information available, use the Export Layout Preference option.

> **Note:** You can export the payroll layout using start/stop time fields by selecting the payroll export layout preference.

Use the Self-Service Templates window.

To export a template for time entry:

1. Choose Templates from the Self Service OTL Menu.

2. Do one of the following:

    - Choose Export on the desired template line.

    - Choose Create Template, if information you want to export does not exist as a template.

3. Review the data on the Template window to ensure this is the correct template to export.

4. Choose Export.

5. Select the option to Save File to Disk.

6. In the Windows dialogue box, enter the file name and location. The extension MUST BE .csv.

    Once the template is saved as a spreadsheet, you can enter your time for the week into the .csv file. You can add or update existing line items as desired. However, make sure you do not modify the Oracle Reserve section.

    You can view the valid list of projects and the associated task by scrolling down within the saved .csv file. The listed projects have the appropriate task associated to

each project. This features allows you to select and enter the correct project and task information on the exported timecard.

When you have entered all the time data, save your work to be imported into Oracle Time & Labor.

> **Tip:** Include the date of the last day of the time period in the file name to help you identify it later, since this information is not stored on the spreadsheet itself. For example, you could name the file, time_12Nov.csv.

To import a timecard to Oracle Time & Labor:

1. Choose Time Entry from the Self Service OTL Menu.

2. Choose Import Timecard from the Time Entry window.

3. Select the Timecard Period for the timecard you are importing.

   If the timecard period is not displayed in the list of values, select a timecard period closer to the desired period and click on the Go button. Continue moving towards the desired timecard period by selecting a timecard period and Go button until the desired period is displayed.

4. Choose the Browse Button and select the file name to Import.

5. Once both the timecard period and file name are displayed, choose Import Timecard.

   The Timecard page opens displaying the data entered from the spreadsheet that has a corresponding field on the timecard layout.

6. Do one of the following:

   • Edit your entries

   • Save for later without submitting your entries

   • Review and submit your entries.

Running the Transfer Time from OTL to BEE Process

Use the process Transfer Time from OTL to BEE to transfer the time and labor data from Oracle Time & Labor to Batch Element Entries for processing.

> **Note:** To ensure data integrity, make all timecard changes in OTL and not in BEE.

Oracle Time & Labor provides you with a profile option allowing you to determine the number of past days for which retrieval considers changes.

For employees with the OTL Rules Evaluation preference set to Yes, this process does not transfer time directly to BEE. It transfers to the professional forms Timecard window, where you can review the batch, make corrections, and enter exceptions. Then use the OTLR processes to transfer to BEE.

Use the Submit Requests window from an HRMS responsibility.

To run the Transfer Time from OTL to BEE Process:

1. From the Submit Requests window, select Transfer Time from OTL to BEE.

2. In the Parameters window, enter the following:

- Start Date - the date for which the report begins the transfer.

- End Date - the date for which the report ends the transfer.

3. The following selections are optional and will narrow the data transferred from OTL to BEE. If you select one or more of the following, your transfer will be specific to only the criteria entered for each option.

- Government Reporting Entity (for US and other localizations that support GREs)

- Organization

- Location

- Payroll

- Employee Name

4. Enter the following criteria:

- Retrieval Transaction Code - enter a Retrieval Transaction Code to identify all timecards that will be retrieved in this process run. You can use this code to identify this run when you submit the Retrieval Error Handling Report. The code must not exceed 24 characters.

- Batch Selection - select New to transfer all timecards that meet the defined criteria. Select Old with the appropriate Retrieval Transaction Code to re-run a transfer process exactly as before.

5. Based upon the entry selected in step 4, you must enter either an existing batch reference or a new reference:

- Batch Reference - if you selected Old in Batch Selection, select the Batch Reference associated with the old batch.

- New Batch Reference - if you selected New in Batch Selection, enter a Batch Reference to the new batch.

  The reference must not exceed 15 characters. This becomes the batch ID in BEE, with a suffix--such as _a or _b--if the batch has been broken into smaller subunits. By default, there are 25 timecards in each batch (determined by the HXT_Batch_Size profile option).

6. Status in BEE - select one of the following to indicate what status the transferred data will have when the transfer process is complete:

- Transferred, meaning the batch header and all the lines have been transferred from BEE to element entries.

- Unprocessed, meaning that at least one batch line or the header is unprocessed and should be validated in BEE before transfer.

- Valid, meaning that all of the lines plus the header are valid for transfer to element entries.

  Note: The OTLR Details to BEE parameter always has the value No, meaning that if you apply OTL rules to the employee's time, this process transfers the time to the Timecard window (instead of BEE) so you can see the OTLR details after the rules are applied.

7. Changes Since - Defaulted from the number of days entered on the profile option "OTL: Number of past days for which retrieval considers changes (days)".

> **Note:** If changes are made to a timecard within the past number of days, and the system date, the retrieval process will include those timecards within the transfer process. However, if timecard changes are outside of the number of days past, those timecards will not be included in the transfer process.

8. Choose OK to close the Parameters window and choose Submit to run the process.

Next, you may choose to view the transferred data in BEE, Element Entries, or the professional forms Timecard window.

Running Transaction Import from OTL to Oracle Projects

Use the PRC: Transaction Import process to transfer time and labor data from Oracle Time & Labor to Oracle Projects. This process transfers the timecards that meet the retrieval rules for Oracle Projects and that belong to workers with Oracle Projects in their application set and retrieval rule group (determined by preferences).

Use the Submit Requests window from an Oracle Projects responsibility.

to run the Transaction Import Process:

1. From the Submit Requests window, select Transaction Import.

2. In the Parameters window, select Oracle Time and Labor in the Transaction Source field. Leave the Batch Name field blank.

3. Choose OK to close the Parameters window and choose Submit to run the process.

Running the Retrieval Error Handling Report

Use the Retrieval Error Handling report to identify timecards that were not passed to the appropriate application during the retrieval processes (such as Transfer Time from OTL to BEE).

Use the Submit Requests window.

To run the Retrieval Error Handling Report:

To run the Retrieval Error Handling Report

1. From the Submit Requests window, select Retrieval Error Handling Report.

2. In the Parameters window, enter the following:

   - Start Date - the date for which the report begins the search.

   - End Date - the date for which the report ends the search.

   - Transaction Code - the Retrieval Transaction Code you entered to identify the batch to transfer to BEE. (There is no transaction code for timecards transferred to Projects using Transaction Import.)

   - Retrieval Process - select the appropriate retrieval process name to check for any errors.

3. Choose OK to close the Parameters window and choose Submit to run the process.

4. Next, review the report generated by this process.

Creating Timecards Without Self-Service

Follow these steps to create, validate, and approve timecards if you are not using Self Service timecards.

To create timecards using information from employee's assignments to time management structures and policies:

1. Run the Automatic Timecard Generation process. See: Submitting the Timecard Autogeneration Process, page 10-7

2. To check results of this process, use the Manual and Autogen report or the Batch Status Review window to see which timecards are in error. See: Reviewing Batch Status, page 10-12

3. Use the Timecard window to correct timecards with errors and to enter timecards manually.

   See: Correcting Erros in Autogenerated Timecards, page 10-8

   See: Using the Timecard Window, page 10-8

4. You can manually record approval of a timecard by selecting a name in the Approver field of the Timecard window.

5. You can now validate and transfer the timecard data to BEE or Oracle Projects. See: Transferring Time and Labor Data From the Timecard Window, page 10-10

Submitting the Timecard Autogeneration Process

Autogenerate timecards at the beginning of a pay cycle. Use the Submit Requests window.

> **Note:** This process is supplied for consistency with earlier releases of Oracle Time Management. If you are using self service timecards with Oracle Time & Labor, you do not need to run this process. Workers autogenerate their own timecards when they select the Work Schedule template.

To autogenerate timecards:

1. Choose Single Request and click OK.

2. Select Automatic Timecard Generation for the Request Name.

3. In the Parameters window, select the Payroll to process.

4. Select the Time Period to process.

5. Enter a Batch Reference if desired.

6. Choose OK.

7. Choose Submit Request.

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

Correcting Errors in Autogenerated Timecards

Use the Timecard window to view timecards created by the Automatic Timecard Generation process.

> **Note:** To report on all timecard errors for a payroll and pay period, use the Manual and Autogen report or the Batch Status Review window. See: Reviewing Batch Status, page 10-12

To view autogenerated timecards:

1. Query the Period End date and the Payroll for which you want to view timecards.

   The Source field indicates which timecards have been autogenerated.

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

3. Choose the Show Error button to display the errors for a timecard.

4. Correct the time entry data for each timecard in error.

5. Save your work.

Using the Timecard Window

Use the Timecard window to review and edit timecards that have been autogenerated from schedule information or transferred from Self-Service by the Transfer Time From OTL to BEE process. You can use this window to make corrections or enter exceptions. However, be aware that the information an employee sees in Self-Service will then differ from the information transferred to BEE from this window.

> **Important:** You can also enter timecards manually using this window. First you must define a batch header for BEE. See: Entering a Batch Header.

To edit a timecard:

1. Query the timecard using the Payroll, Period End Date and/or the Employee Number.

2. Optionally select the name of the person approving the timecard in the Approver field. If you select a name in this field, a date and time stamp appears in the Date Approved field.

3. Review the Total Number of Hours on the timecard. This field is required. If you change the hours worked on any day, you must update the Total Number of Hours to sum the hours correctly.

4. If the employee has multiple assignments, you can select a different assignment number.

5. To change the number of hours worked in a day, you can do *one* of the following:

   • Enter the number of hours the employee worked on that day.

- Enter the time IN and time Out fields in a 24-hour clock format.

6. Select the Hours Type if you wish to override the default hours type.

7. Select the Earning Policy if you wish to override the employee's assigned earning policy.

8. In the Additional Information region, update the fields as required:

- Amount: Enter the value for the override amount.

- Hourly Rate: Enter the values for the override hourly rate.

- Reason: Select reason for absence or overtime. This field is informational only and is not passed to Batch Element Entry.

- Cost Center: Select the cost center applicable for this transaction.

- Project: Select the project applicable for this transaction.

- Task: Select the name of this task. If using Oracle Projects, you cannot select a task without first entering a Project.

- Comments: Enter additional comments for this line item. Select Edit Field from the Edit menu to enter your comments in the Editor.

- Multiple: Enter the value for the override multiple.

- **US Only:** Location: Select the location worked. This is an override location.

- Shift: Select the shift this task applies to. This is an override shift.

- **US Only:** Tax Rule: Enter the applicable Tax Rule.

- **US Only:** Separate Check: Click on this field to request a separate check for this transaction.

- Wage Code: Reserved for future use

9. Continue to edit time and labor data for the other days in the period.

10. Save your work.

Selecting an Organization's Default Timecard Approver

If a worker has a supervisor recorded on their assignment, the supervisor's name displays in the Approver field of the professional forms Timecard window. To provide a default for workers who do not have a supervisor recorded on their assignment, you can select a default approver for your organization. If you do not provide a default, you will not be able to select an approver on the Timecard window for workers who do not have a supervisor on record.

> **Note:** This feature does not affect the self service Timecard or approval styles. It simply provides a default on the professional forms Timecard window.

Use the Organization window.

To access the Additional Organization Information window:

1. Query the HR Organization you are interested in.

2. In the Organization Classifications region, select HR Organization and choose Others. The Additional Organization Information window displays.

3. Select Time Management Information and choose OK.

4. Click in the field, and the Time Management Information window displays.

5. Select the appropriate default Timecard Approver.

6. Choose OK to close the window.

7. Save your work.

Transferring Time and Labor Data From the Timecard Window

For workers with the OTL Rules Evaluation preference set to Yes, the Transfer Time from OTL to BEE process transfers the timecards to the professional forms Timecard window. There you can review details such as overtime and premiums, which result from the application of the OTL schedule and policy rules. Next follow these steps to transfer the data to BEE (for Oracle Human Resources and Payroll) or Oracle Projects.

> **Note:** You can also follow these steps if you have created timecards without using Self Service.

To transfer data from the Timecard window:

1. Run the Validate for BEE process. See:Validating Work Schedule Timecards for BEE, page 10-11

2. Use the Batch Status Review window to see which timecards are in error. See: Reviewing Batch Status, page 10-12

3. When the validation is successful, transfer the timecards to Batch Element Entry. See: Transferring Timecards To BEE, page 10-12

4. Optionally, transfer the timecards to Oracle Projects. See: Transferring Timecards to Oracle Projects, page 10-13

For information about using Batch Element Entry, see: Making Batch Element Entries Using BEE.

Configuring the Validate for BEE Process

Some of the validation carried out by this process is configurable: you can choose whether it generates a warning, an error, or is disabled. The validation messages are stored as lookups in the HXT Timecard Validation lookup type. Each message can have one of the following tags:

• WRN, meaning that the validation produces a warning message

• ERR, meaning that the validation produces an error message

• SKIP, meaning that the validation is skipped (that is, disabled)

You can configure the following validation.

Lookup	Meaning
24_HOUR_EDIT	Hours charged to the assignments have exceeded daily maximum of 24 hours.
DAY_IS_HOLIDAY	Day exists on holiday calendar.
HOLIDAY_NOT_VAL	Holiday not valid on Holiday Calendar.
HOURS_NOT_EQUAL	Hours charged not equal to hours on calendar.
INSERT_ERRORS	Error occurred while trying to insert an error record in Timecard Errors table.
PERSON_NOT_IN_DB	Person not found in database.
PTO_CHG_ACCRUED	More PTO (such as sick or vacation) charged than accrued.
TIMECARD_ERRORS	There are timecard error(s) in this batch.
TIMECARD_INACTIVE	Timecard for inactive employees became inactive.
TIMECARD_NOT_APPROVED	Timecard not approved.

Use the Application Utilities Lookups window.

To configure the HXT Timecard Validation lookup type:

1. Query the HXT Timecard Validation lookup type.

2. For each lookup, check the value in the Tag field. You can update the values to WRN, ERR, or SKIP to control whether the validation is performed, and the type of message it generates.

> **Note:** In addition to the lookups described in the table above, there is the ABS_NOT_ASG_TO_ACRL lookup (meaning that the absence is not part of a PTO accrual plan associated with this assignment). This validation is performed during time entry on the professional forms Timecard window, not by the Validate for BEE process. You can update the tag for this lookup in the same way as the others. For example, you might want to change the tag from WRN to SKIP to speed up data entry.

3. Save your work.

Validating Work Schedule Timecards for BEE

Run the Validate for BEE process to check timecards before transferring them from the Timecard window to Batch Element Entry.

Use this process only for timecards transferred to the professional forms Timecard window for OTL Rules evaluation or generated by the Automatic Timecard Generation process.

Use the Submit Requests window.

> **Note:** You can configure the validation performed by this process. See:Configuring the Validate for BEE Process, page 10-10

To validate timecards:

1. Select Single Request and choose OK.

2. In the Request Name field select Validate for BEE**.**

3. In the Parameters window, select the Starting Batch Name. This is the batch that you wish to validate.

4. Optionally, select the Ending Batch name. Use this option to validate multiple batches (named sequentially) within one job.

5. Optionally, select the Batch Reference.

6. Choose OK to close the Parameters window.

7. Choose Submit Request to start the Validate for BEE process.

Reviewing Batch Status

Use the Batch Status Review window to view, in one or more batches, all timecards transferred to the professional forms Timecard window for OTL Rules evaluation. You can determine which timecards, if any, are in error.

To review batch status:

1. Enter any of the following fields to select the batches of timecards to review: Payroll, Period End date, Batch Reference, and Batch Status. Use the Beginning and Ending Batch fields to select a range of batch numbers to review.

2. Choose the Find button. The Batch Status Review window lists all the employees in the first selected batch, with the total hours from their timecards and the timecard status.

3. Choose the Batch Total button to view the total hours and total amount for the batch.

4. Close the Batch Totals window and press the Down Arrow key to view the next batch you selected.

To view a timecard from the Batch Status Review window:

1. Click in the row for the timecard you want to review.

2. Choose the Timecard button.

Transferring Timecards to BEE

Run the Transfer to BEE process to transfer validated timecards from the Timecard window to batch lines. Use the Submit Requests window.

Note: Use this process only for timecards generated by the Automatic Timecard Generation process or transferred to the professional forms Timecard window for OTL Rules evaluation.

To transfer timecards:

1. Select Single Request and choose OK.

2. Select **Transfer to BEE** in the Request Name field.

3. In the Parameters window, enter the process date, which is the Period End Date for the Batch of timecards you are transferring.

4. Select the Starting Batch Name, which is the batch that you wish to transfer.

5. Optionally, select the Ending Batch Name (to transfer multiple batches, named sequentially) and the Batch Reference.

6. Choose OK to close the Parameters window.

7. Choose Submit Request to start the Transfer process.

> **Note:** Check the batch job on the Concurrent Requests Summary window to verify the Transfer to BEE process completed with a Normal Status. Then you can view timecards you have transferred to Batch Element Entry using the Batch Header and Batch Lines windows.

Transferring Timecards to Oracle Projects

Use the Submit Requests window to transfer timecards from the Timecard window to Oracle Projects.

> **Note:** Use this process only for timecards generated by the Automatic Timecard Generation process or transferred to the professional forms Timecard window for OTL Rules evaluation.
>
> You can transfer other self-service timecards to Oracle Projects using the PRC: Transaction Import process. See: Running Transaction Import from OTl to Oracle Projects, page 10- 6

To transfer timecard/project data to Oracle Projects:

1. Select Single Request and choose OK.

2. In the Request Name field, select Transfer to Project Accounting.

3. In the Parameters window, enter the Payroll Name and Time Period.

4. Choose OK to close the Parameters window and choose Submit Request.

Reviewing Employee Time

For employees assigned to work schedules, Oracle Time & Labor provides a fast method of viewing their time without paging through numerous timecards on the Timecards window. Use the Review of Employee Time folder to view an employee's time for a certain period and by all the types of hours worked. You can view all timecards that have been generated by the Automatic Timecard Generation process or transferred to the professional forms Timecard window for OTL Rules evaluation.

To use the Review of Employee Time folder:

1. Select the employee's name or assignment number.

2. Optionally, enter dates to restrict the pay periods you want to view.

3. Run the query.

   The folder displays the total hours and the breakdown of hours by type for each pay period within the dates you selected.

11

Retro Adjustment Procedures

Retro Adjustment Procedures

A retro adjustment is a change made to a timecard after it has been transferred to other applications.

Who can make retro adjustments?

A worker's ability to make retro adjustments in the self-service timecard is controlled by the Timecard Status Allowing Edits preference. This preference determines whether the worker can edit a timecard by the timecard status and date.

Can you validate the retro adjustments made to a timecard?

When you have made retro adjustments to a timecard using the Timecard window, use the Submit Requests window to run the Validate for BEE (retro) process before transferring timecards to Batch Element Entry. This process validates the updated rows.

Retro Adjustments

Overview of Retro Adjustments

A retro adjustment is a change made to a timecard after it has been transferred to other applications.

Who Can Make Retro Adjustments

A worker's ability to make retro adjustments in the self service timecard is controlled by the *Timecard Status Allowing Edits* preference. This preference determines whether the worker can edit a timecard by the timecard status and date. The preference has three fields:

- Status Allowing Edits, which can have one of the following values:

  - New_Working_Rejected --Workers can only edit timecards that have not been submitted, or are in a working or rejected status.

  - Submitted--Workers can edit new, working, and rejected timecards, plus those that have been submitted.

  - Approvals Initiated--Workers can edit new, working, rejected, and submitted timecards, plus those for which an approval process has been initiated.

  - Retro--Workers can edit all timecards, including those that have been submitted, approved, and processed. Adjustments made at this point would create a Retro Time Adjustment.

- Past Number of Days, which holds the age, in days, of the oldest timecard a worker can edit. Timecards for the period in which this day falls will be editable.

- Future Number of Days, which holds the number of days in advance a worker can enter a timecard. For example, if you enter 28, a worker can enter timecards for all periods up to and including the period that contains the 28th day.

  Note: A timecard is only editable if it has a status that allows edits AND it is for a timecard period that falls within the date limits set by this preference.

So, a worker can retro adjust a timecard if the worker's *Timecard Status Allowing Edits* preference is set to Retro and the timecard is for a period that falls within the limit set by the Past Number of Days field of this preference.

What Happens To Retro Adjusted Timecards

Retro adjusted timecards are approved and transferred to other applications in the usual way.

Transferring to Oracle HR or Payroll

The time and labor data is transferred to element entries as of the date of the timecard, not the date on which the adjustment is made. So, if you adjust a June timecard in August, the transferred entries will be effective in June.

You run the Transfer Time from OTL to BEE process for the retro-adjusted timecards. Timecards belonging to workers with the OTL Rules Evaluation preference

set to Yes are transferred to the professional forms Timecard window, not straight to BEE. This process create a retro batch automatically so you are ready to run the Validate for BEE (retro) process. See:Managing Timecard Retro Adjustment, page 11- 3

If you use Oracle Payroll, you can run the Retro Notification process within Oracle Payroll to identify the changes, and then run RetroPay to correct payments.

Transferring to Oracle Projects

If you made any changes to the original timecard data within Oracle Projects, you cannot edit the timecard within Oracle Time & Labor. You will receive an error when you try to submit the retro adjusted timecard.

Managing Timecard Retro Adjustment

The overall process for managing the creation, validation, and transfer of timecard retro adjustments is as follows. This process only applies to timecards that have been transferred from the professional forms Timecard window to Batch Element Entry or Element Entries.

> **Note:** This process does not make retropay adjustments, which must be handled separately within Payroll.

To manage retro adjustments to timecards:

1. Do one of the following:

   - In Self Service, correct the timecards that had incorrect data and transfer the data to the Timecard window. A retro batch is created automatically.

   - Use the Timecard window to correct the timecards, noting the Retro Batch ID number. See:Updating a Timecard for Retro Adjustment, page 11- 3

2. To check the changes you have made, run the Validate for BEE (retro) process. See: Validating Retro Adjusted Timecards, page 11- 4

3. To transfer your changes, run the Transfer to BEE (retro) process. See:Transferring Retro Adjusted Timecards to BEE, page 11- 4

4. If you originally transferred the timecards to Oracle Projects and you have now changed Projects-related data, run the Transfer to Project Accounting (retro) process. See:Transferring Retro Timecard Changes to Oracle Projects Retro, page 11- 5

For information about using Batch Element Entry, see: Making Batch Element Entries Using BEE.

Updating a Timecard for Retro Adjustment

Use the Timecard window to make retro adjustments to a timecard that you have previously transferred from the Timecard window.

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

To update a timecard for retro adjustment:

1. Query the employee number of the person whose timecard you want to correct, and the period end date for the relevant timecard.

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

   A dialog appears indicating an update is in process.

3. Update the Total Hours field to reflect the changes you have made.

4. Save the changes.

5. Note the Retro Batch ID number in the Additional Information block for the line item(s) changed.

   Only one Retro Batch ID is created even if you make multiple changes to the timecard. Use this batch number when you validate the timecard and transfer the timecard to Batch Element Entry, and Element Entries.

Validating Retro Adjusted Timecards

When you have made retro adjustments to a timecard using the Timecard window, use the Submit Requests window to run the Validate for BEE (retro) process before transferring timecards to Batch Element Entry. This process validates the updated rows only.

To validate retro timecards:

1. Select Single Request and choose OK.

2. Select Validate for BEE (retro) in the Request Name field.

3. In the Parameters window, select the Payroll Name for the Retro Batch.

4. Enter the Process date, which is 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 can enter the Batch Reference.

6. Choose OK then Submit Request to start the Retro Validation.

Transferring Retro Adjusted Timecards To BEE

Use the Submit Requests window to run the Transfer to BEE (retro) process after you have entered and validated retro adjustments. This process only applies to timecards that you previously transferred from the Timecard window to Batch Element Entry or Element Entries.

To transfer timecards:

1. Select Single Request and choose OK.

2. In the Request Name field, select Transfer to BEE (retro).

3. In the Parameters window, enter the Process Date, which is the Period End Date for the batch of timecards being transferred.

4. Select the Retro Batch Name that you wish to validate. You can also select the Batch Reference.

5. Choose OK to close the Parameters window.

6. Choose Submit Request to start the Transfer process.

Transferring Retro Timecard Changes to Oracle Projects Retro

This process looks for any summary timecard records that have changed project related information (such as project, task, expenditure type, 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 Oracle Projects. This process only applies to timecards you have previously transferred from the professional forms Timecard window to Oracle Projects.

You run the Transfer to Project Accounting (retro) process after you make retro adjustments using the Timecard window, and after the Validated for BEE (retro) and Transfer to Bee (retro) processes have been completed. Use the Submit Requests window.

To transfer Retro Timecard changes to Oracle Projects (Retro):

1. Select Single Request and choose OK.

2. In the Request Name field, select Transfer to Project Accounting (retro).

3. Enter the Payroll Name and Time Period.

4. Choose OK and choose Submit Request.

   The Transfer to Project Accounting (retro) process transfers the necessary Project information to the Projects Interface Table.

12

Reports

Reports

There are many reports within Oracle Time & Labor to gather data about timecards entered through self-service and to gather data about timecards that you have transferred to the professional forms timecard window.

How do you track which workers have not submitted their timecards?

There is a Missing Timecard Report that lists workers who have missing timecards over a specified period. You can control which timecards are reported - for example, you can report on all timecards that have not been approved, or only those that do not exist at all, or those that either do not exist or have not been submitted, and so on.

Can you run a report to verify setup of time management structures and policies?

Yes, there are reports for all the time management structures and policies that detail the various structures and policies you define. For example, you can run a report to list all the work plans and rotation plans defined.

Oracle Time & Labor Reports

Overview of Oracle Time & Labor Reports

You can run the following reports to gather data about timecards entered through self service.

Report Title	Description
Missing Timecard Report	Lists missing timecards, where you define how to define "missing". See: Running the Missing Timecard Report, page 12-4
Retrieval Error Handling Report	Identifies timecards that were not passed to the appropriate application during the retrieval process (for example, timecards that were not passed to BEE during the Transfer Time From OTL to BEE process). See: Running the Retrieval Error Handling Report, page 10-6

Reports Associated with Oracle Time & Labor Rules

Use the reports listed in the following table to gather data about timecards that you have transferred to the professional forms Timecard window using the Transfer Time from OTL to BEE process, or that you have entered manually in the Timecard window, or that you have created using the Automatic Time Card Generation process.

Report Title	Description
Organization Variance Calc	Lists all organizations and their variances per pay period
Location Variance Calculation	Lists all locations and their variances per pay period
Earning Variance Calculation	Lists all earnings and their variances per pay period
Actual and Rounded Time Punch	Lists actual time entered on Timecard window 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.
OTLR Missing Timecard Report (associated with the application "Oracle Time & Labor Rules"	Lists missing timecards by employee.
Manual and Autogen Report	Lists timecards to which you have applied schedule rules, in three groups: manually entered timecards, timecards in error, and all timecards available for payroll and time period.
Total Hours to BEE Report	The summary page shows the total of all Timecard Hours, BEE Hours, and Element Entries Hours for the selected payroll and process date. The detail page shows the same information broken down per batch. See:Total Hours to BEE Report, page 12- 6
Overtaken Vacation and Holiday Report	Shows who is taking excess vacation. The report displays the accrual of vacation and holiday hours, the hours taken, and the hours overtaken for the selected payroll and date. See:Overtaken Vacation and Holiday Report, page 12- 6
Element Entries Adjustments Report	Lists all timecard updates to element entries for a specified payroll and date. The report shows the employee name and number, element, amount or hours, rate, gross adjustment, and date worked for all adjustments. See:Element Entries Adjustments Report, page 12- 6

Use the reports listed in the following table during implementation to check the time management structures and policies that you have setup.

Report Title	Description
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
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

Running the Missing Timecard Report

Use the Missing Timecard Report to identify which employees are required to submit timecards, but have no timecard reported between selected dates. You can define the term "missing" and select a time range in which to perform your search. You may narrow your search by defining various parameters to select a single timecard or a group of timecards.

You can sort the returned data by defining various levels and options.

Use the Submit Requests window.

To run the Missing Timecard Report:

1. From the Submit Requests window, select Missing Timecard Report

2. In the Parameters window, enter the following:

    *   Date From- the date for which the report begins the search.

    *   Date To - the date for which the report ends the search.

    *   Define Missing - select one of the following options to define the missing timecard criteria:

        *   Req. and status not equal to Approved - Report on all required timecards that have not been approved.

        *   Req. with no Entries - Report on all required timecards that have no data entered for any days.

        *   Req. with no Entries and Working Status - Report on all required timecards that have no data for any days and have a Working status.

        *   Req. with no Entries, Working and Rejected Status - Report on all required timecards that have no data for any days and have a Working status or Rejected status.

3. Select one of the following to narrow the search criteria for missing timecards:

    *   Application

    *   Organization

    *   Location

    *   Payroll Assignment Set

    *   Payroll Name

    *   Person type

    *   Supervisor Name

    *   Person Name

    *   Person Number

    *   Assignment Type

    *   Supplier

4. Select one of the sort options for the returned data.

    *   Sort Option One

    *   Sort Option Two

    *   Sort Option Three

    *   Sort Option Four

5. Choose OK to close the Parameters window and choose Submit to run the process.

6. Next, review the report generated by this process.

Element Entries Adjustments Report

Use this report to track timecard updates to element entries. The report shows the employee name and number, element, amount or hours, rate, gross adjustment, and date worked for all adjustments for the specified payroll and date.

You run the Element Entries Adjustments report from the Submit Request window.

To run the Element Entries Adjustments report:

1. In the Name field, select Element Entries Adjustments. Click in the Parameters field if the Parameters window does not appear automatically.

2. Select the parameters for the process: the name of the Payroll and the Process Date.

3. Choose OK to close the Parameters window.

4. Choose Submit.

Overtaken Vacation and Holiday Report

Use this report to track who is taking excess vacation. The report shows the accrual of vacation and holiday hours, the hours taken, and the hours overtaken for the selected payroll and date.

You run the Overtaken Vacation and Holiday report from the Submit Request window.

To run the Overtaken Vacation and Holiday report:

1. In the Name field, select Overtaken Vacation and Holiday. Click in the Parameters field if the Parameters window does not appear automatically.

2. Select the parameters for the report: the name of the Payroll and the Process Date.

3. Choose OK to close the Parameters window.

4. Choose Submit.

Total Hours to BEE Report

Use this report to track non-retro hours from the Timecard window through BEE to element entries. The Total Hours to BEE summary page shows the total of all Timecard Hours, BEE Hours, and Element Entries Hours for the selected payroll and process date. The Total Hours to BEE detail page shows the same information broken down per batch.

You run the Total Hours to BEE report from the Submit Request window.

To run the Total Hours to BEE report:

1. In the Name field, select Total Hours to BEE. Click in the Parameters field if the Parameters window does not appear automatically.

2. Select the parameters for the report: the name of the Payroll and the Processing Date. For the Processing Date, use the same date you entered when running the Transfer to BEE process (the period end date for the batch you transferred).

3. Choose OK to close the Parameters window.

4. Choose Submit.

13

Timekeeper

Timekeeper

Does Timekeeper Support Heads-down Data Entry?

Timekeepers can quickly enter time and labor data in the Timekeeper Entry window. This window auto-populates worker names according to the group for which the Timekeeper is entering data. Timekeepers can navigate through the window using the keyboard or mouse. If additional data entry rows are needed, hot keys are available to add a new row.

Can Anyone Be a Timekeeper?

You designate a person as a Timekeeper via a profile option. With this option, you can designate a person as a Timekeeper responsible for specific group or groups of workers.

There are three types of Timekeepers:

- Regular Timekeepers
- Super Timekeepers
- Limited Timekeepers

Regular Timekeepers can define their own groups of workers and enter time for them.

Super Timekeepers can create groups for others as well as themselves and can enter and view time for any group in their respective business group.

Limited Timekeepers can enter time for their groups, but they cannot define a group.

Timekeepers are bound by business group security.

Can Timekeepers Work on a Defined Sub-group of Employees?

You can define groups of workers, called Timekeeper Groups, to allow for faster data entry. You can define Timekeeper Groups to reflect the crew, location, or other defining characteristic for the Timekeeper to use. You can create Timekeeper Groups ad-hoc or by using an assignment set.

Can Timekeepers Make The Same Change On All Their Workers' Timecards at Once?

Mass Edit functionality is available for changes or additions that you need to make to many workers at once. After you select the workers for an edit, the Mass Edit window allows the Timekeeper to add, change, or overwrite both existing data and null values.

Can The Timekeeper Entry Be Configured to Reflect My Business?

The Timekeeper Entry window is configurable via the professional windows interface. You can decide what attributes are shown on the Timekeeper Entry window based on what needs to be entered for your workers.

Oracle Time & Labor: Timekeeper

Timekeeper

Timekeeper is a set of features in Oracle Time & Labor that allows you to enter and maintain timecard information for multiple workers in a single session.

Timekeeper is not available in Self-Service HRMS.

Overview

Oracle Time & Labor gives you a heads-down approach to enter time for multiple workers in a single session using the Timekeeper feature. A person in the role of a *Timekeeper* can:

*   Enter time for other employees from a paper-based system filled out by the employee

*   Review and make changes to timecards imported from other time collecting devices, including OTL Self Service.

Timekeepers enter time for a large group of workers, called a *Timekeeper Group.* Timekeepers define their groups using various criteria, such as assignment sets defined in Oracle HRMS, and organizations. You can choose to add or delete specific workers from the chosen criteria and place them in another Timekeeper group. A *Super Timekeeper* can define a Timekeeper Group across the entire Business group, and give a group to another Timekeeper to process and maintain. Timekeepers can enter information for workers who do not have an active assignment, such as making adjustments after a worker has been terminated.

Timekeepers select a specific Timekeeper Group for which they have responsibility to maintain, and perform time entry for individuals or the entire group in a window called the *Timekeeper Entry* window. The Timekeeper enters time, validates, reviews and corrects time entry errors, and submits the timecards for approval. A Timekeeper is not necessarily an Approver.

Additionally, the Timekeeper can perform *mass edits* on the entire group of workers or a selected subset. For instance, a Timekeeper might change a value in a given field to "Yes" for all workers in a group; or change a cost center, or a project code.

Super Timekeepers have the ability to see all Timekeeper Groups in a business group -- this is unique to Super Timekeepers. Regular Timekeepers can only view time for workers in a Timekeeper Group that they own; an exception being if a Super Timekeeper temporarily assigns a group or groups to another Timekeeper, for instance while on a leave of absence.

Timekeeper System Responsibilities

Oracle Time & Labor has responsibilities to support the Timekeeper feature set: Timekeeper and Super Timekeeper.

Timekeeper

A Timekeeper is a person who enters time for other employees. A Timekeeper can:

*   Define Timekeeper Groups

*   Find timecards based on given criteria

- Enter time for others

- Correct errors

- Perform Mass Edits for his entire group or groups

Limited Timekeeper

Limited Timekeepers are people who enter time for other workers. Limited Timekeepers cannot define timekeeper groups for themselves. Limited Timekeepers can:

- Find timecards based on a given criteria

- Enter time for others

- Correct errors

- Perform Mass Edits for their entire group or groups

Super Timekeeper

A Super Timekeeper operates at a higher-level than a Timekeeper, and has access to all groups in the business group security level. A Super Timekeeper has access to all groups that have been defined within the business group, and can enter time for all employees within the business group. A Super Timekeeper can create groups and assign them to other Timekeepers. A Super Timekeeper can perform all Timekeeper functions across all groups in a business group.

Contingent workers can act in any of the Timekeeper roles, such as Super Timekeeper, Limited Timekeeper, or as a Timekeeper.

Timekeeper Windows

You use the following windows to set up Timekeeper, or to use the Timekeeper features:

Timekeeper Group Window

The Timekeeper Group window is where you define groups for a Timekeeper.

The act of creating a Timekeeper group assigns the group to you by default. If you are a Super Timekeeper, you can also assign another Timekeeper to own this group.

Groups defined in the Timekeeper Group window are available in the Timekeeper Entry window for the appropriate Timekeeper.

Timekeeper Entry Window

The Timekeeper Entry window is the collection point for a Timekeeper. The groups you defined in the Timekeeper Group window display in this window and you enter time for them.

Oracle Time & Labor delivers the capability to show hours type, project name, task name, task type, in/out, name, quantities and so forth, on the Timekeeper Entry window.

If there are additional attributes you want to display, then you need to define your own alternate name definitions. You can use the seeded alternate names that already exist in the application.

You must setup the Timekeeper Layout Attributes, and the Timekeeper Misc. Setup Steps preferences to define which columns appear on the Time Entry Window.

Find Window

The Find window opens automatically when you enter the Timekeeper Entry menu. It allows you to search for either of the following:

- a previously defined Timekeeper Group,

- an individual person.

However, you must choose a time period.

The lower part of the Find Window performs an Advanced Search; the Advanced Search items are dynamic based on the Timekeeper Entry window configuration. You enter search criteria in as many fields as you need to narrow the search results. The system considers that any information you enter must match an existing value to return a worker's timecard.

Mass Edit Window

The Mass Edit window displays when you choose the Mass Edit button on the Timekeeper window.

You use Mass Edits to perform the same edit function on the subset of timecards you select in the Timekeeper window.

Messages Window

The Messages window displays any errors, or warnings attached to a timecard. After you save or submit a timecard to the Time Store, a Timekeeper checks any errors created during the OTL validation, or errors in the database. For instance if a worker is not eligible for a given project, then the error will be noted in this window. If the timecard is deposited successfully, no errors display.

The context of the error displays in the Message window, including the name of the worker whose timecard is in error.

You access the Messages Window by selecting the Messages button on the Timekeeper Entry window.

Detail Page Window

The Detail Page window allows you to add comments to any day on the timecard(s) you select in the Timekeeper Entry window. You can attach a descriptive flexfield to the comments, if needed, to capture Oracle Projects' expenditure-type information in a more structured way. You use the preference, Timekeeper Misc. Setup Items.

To display the Detail button on the Timekeeper Entry window, the parameters "Description Flexfield to Display" must be set.

You access the Detail Page window by selecting the Detail button from the Timekeeper Entry window.

Seeded Items in OTL TImekeeper

Overview of Seeded Items in OTL Timekeeper

The following tables depict items seeded for OTL Timekeeper

Responsibilities

The following are the seeded responsibilities for OTL Timekeeper

Responsibility	Profile	Value
OTL Timekeeper (HXC_TIMEKEEPER)	OTL: Allow Change Group Time	No
OTL Super Timekeeper (HXC_SUPER_TK)	OTL: Allow Change Group Time	Yes
OTL Limited Timekeeper (HXC_TK_ENTRY)	OTL: Allow Change Group Time	No

Alternate Name Definition

The following are the seeded Alternate Name Definitions for OTL Timekeeper.

Alternate Name Definition	Description	Type Name	Prompt
TK Expenditures List	List of Expenditures Types for Timekeeper Layout	HXC Expenditure Type SLF List	Type
TK Project List	List of Projects for Timekeeper Layout	HXC Projects List	Project
TK Tasks List	List of Tasks for Timekeeper Layout	HXC Tasks List	Tasks

Alternate Name Mapping

The following are the seeded Alternate Name Mappings for OTL Timekeeper.

Value Set/Context	Type Name	Attribute/Column Name	Mapping Component Name
OTL Alternate Name DFF Context	Elements Expenditure System Linkage Function	Expenditure_Type	PA Expenditure Type
		Identifier	ID Elements Expenditure SLF
		Payroll_Elements	Dummy Element Context
		System_Linkage_Function	PA System Linkage Function
OTL Alternate Name DFF Context	Payroll Elements	Identifier	ID Payroll Elements
		Payroll_Element	Dummy Element Context
OTL Alternate Name DFF Context	Projects	Identifier	ID Projects
		Projects	PA Project ID
Value Set - Independent	US#Cost Center	Value	CostSegment1
Value Set - None	HXC Number Entry	Value	InputValue3
Value Set - Table	HXC Expenditure Type SLF List	Expenditure_type	PA Expenditure Type
		system_linkage_function	PA System Linkage Function
Value Set - Table	HXC Projects List	project_id	PA Project Id
Value Set - Table	HXC Tasks List	task_id	PA Task Id

Menus

The following are the seeded Menus for OTL Timekeeper:

Menu	User Menu Name	Prompt	Function
HXC_TK_ENTRY	OTL Timekeeper Entry	Timekeeper Entry	OTL Timekeeper Entry
HXC_TK_ENT_GRP	OTL Timekeeper	Timekeeper Group	OTL Define Timekeeper
		Timekeeper Entry	OTL Define Timekeeper

Setting Up Timekeeper

Timekeeper setup is a series of tasks, listed below. A system administrator must perform some tasks; the Timekeeper can perform others.

To set up Timekeeper:

1. Configure Timekeepers and Super Timekeepers

    Performed by the System Administrator. Define new menus, new responsibilities, and assign Profile Options.

    See the online help, or *Implementing Oracle Time & Labor* for details.

    The profile option OTL: Allow Change Group Timekeeper should always be attached to a user- or responsibility- level and should not be set to a site level. If you set the profile to "Yes" then the user is a Super Timekeeper; if you set to "No" then the user is a regular Timekeeper.

2. Configure the Timekeeper Entry window, if needed.

    Performed by the OTL System Administrator. Value Set Definitions for Alternate Names based on Value Sets should only be required if the delivered value sets do not suffice.

    Be sure to set the Timekeeper Layout Attributes preference, and the Timekeeper Misc. Setup Items preference. These preferences relate to the Timekeeper; however, all the workers for whom the Timekeeper enters time still need to have Self-Service preference and Time Store preference set.

3. Create Timekeeper Groups, page 13-12

    Performed by Super Timekeepers and regular Timekeepers, if allowed.

Configuring the Timekeeper Entry Window

These tasks must be completed by a System Administrator or OTL Developer responsibility.

Configuring the Timekeeper Entry Window:

1. Define a New Alternate Name Based on a Value Set, page 13- 8

2. Create Mapping from the Value Set to the Time Store, page 13- 8

3. Defining an Alternate Name, page 13- 8

4. Assign the Preference to a Layout, page 13- 8

5. Test the Layout, page 13- 8

Defining a New Alternate Name Based on a Value Set

Oracle Time & Labor includes value sets for projects, tasks, expenditure types, etc. If you add a new column (a column not delivered) to the Timekeeper Entry window, then you can attach that column to your defined value set.

This is an optional setup step.

Oracle Time & Labor supports value types of table, independent, and none.

System Administrators define value sets from the Value Sets window.

For more information on defining a new value set, see Oracle HRMS Application Flexfield Guide

> **Note:** Choose the Oracle Application that has the information you want to access, and the specific table within that application that holds the data you need.
>
> Choosing the specific table you need requires you to be already familiar with the product's schema. For instance, if you wanted to access the table that contains all employees, you would need to know that this information is in Oracle HRMS and in the table, PER_ALL_ASSIGNMENTS_F.
>
> Select the ID number in the ID field that relates to the value that you want displayed in the Timecard. Predefined layouts expect certain information to be in a specific segment of the flexfield. If you change the layout, you must change the SQL to reflect the changed order of the segments.

Creating a Mapping from the Value Set to the Time Store:

System Administrators create mappings from the Alternate Names Mapping window. This setup is optional unless you have defined a new Value Set.

To create a Mapping from the Value Set to the Time Store

1. Select the Value Set context for the value set you previously created

2. Enter or Query the name of the value set you created previously, and save your work.

3. Select the Field IDs in the Mapping Association field that you previously defined.

4. Choose the mapping component where you want to store the values.

   Choose a location within the Time Store where you know you want to store these values. For instance, if you know these values will be part of the Retrieval Process, Deposit Process, and so on, choose those mapping components.

5. Save your work.

Defining an Alternate Name:

System Administrators define alternate names from the Alternate Names window. This is an optional setup if you have defined a new Value Set and Mapping; however you

must perform this setup if you have an Alternate Name type of OTL Alternate Name DFF Context.

To define an Alternate Name:

1. Enter the Alternate Name Definition.

    This name shows in the list to assign as a preference.

2. Enter a description of this Alternate Name.

3. Choose the same Type as the value set context previously defined for the value set, such a Table.

    The Type Names displays

4. Choose the Alternate Name you previously defined.

5. Enter the Prompt you want displayed on the Timekeeper Entry window for your Alternate Name.

6. Save your work.

Assigning an Alternate Name to the Timekeeper Layout Preference:

OTL Developers assign alternate names to a layout preference from the Preferences window.

> **Note:** If you use Multiple Business Groups with a single Super Timekeeper, then you must use a responsibility-based eligibility criteria with a high precedence value. This allows Timekeepers to view all the groups they are responsible for, and allows the preferences for each group to take effect.

To assign the Alternate Name to the Timekeeper Layout Preference:

1. Choose the appropriate branch and name in the tree where you want this preference to belong.

2. Choose the preference you previously defined for the Timekeeper Layout Attributes.

3. Enter the Preference Values to define the fields that will be on the Timekeeper layout.

    > **Note:** The sequence you enter will be the sequence in which they display.

    The system expects to find the Project List in Timekeeper Layout Item 1. If you change the layout, you must you must define a custom Alternate Name.

4. Define Timekeeper Misc. Setup Items preference to set whether in/out time displays, the person's name displays, and whether the person's employee number displays.

5. Choose OK and save your work.

Testing the Timekeeper Layout:

You test the layout from the Timekeeper Entry window.

To test the Layout:

1. Find any worker for whom you are responsible.

2. Scroll through the columns until you find the prompt you previously defined.

3. Click in the field and confirm that the information that displays is correct for the value sets you defined.

   If the columns on your Time Entry window do not appear as expected, double-check the setup of your value sets, and ensure that the timekeeper has the appropriate preferences.

Using Timekeeper

Timekeepers enter information from the Timekeeper Entry window.

For information on using keyboard shortcuts, see Oracle HRMS Applications User Guide.

Tab-key navigation is available in this window.

To use Timekeeper:

1. Find the Timekeeper Group or an Individual using the Find window to populate the Timekeeper Entry window.

   > **Caution:** Remember to select a Timecard Period when you are in the Find Window. This value auto-populates when a Timekeeper selects a group or person.

2. Edit the time information that displays.

   You can edit individual lines, or select some or all lines, and then use Mass Edits to make the same changes to all the selected lines.

   See Using Mass Edits on Timecards, page 13-14

3. Save or submit the timecards to the Time Store for OTL validation and/or approval.

4. View any errors in the Message window and correct.

5. If needed, re-submit the timecards for OTL validation and/or approval.

Timekeeper Groups

Timekeeper Groups Overview

A Timekeeper is responsible for entering or updating timecards for a group of people; a Timekeeper Group contains the workers for whom the Timekeeper is responsible.

Using the Timekeeper Group window, you select workers and put them into a Timekeeper Group. This allows you to process time for these workers as one group rather than as individuals. You can choose to add or delete specific workers from the chosen criteria, and place them within another group.

> **Note:** We recommend that you create Timekeeper Groups with workers with the same timecard period.

When you create a Timekeeper Group, it becomes available in the Timekeeper Entry window.

The employee's primary assignment determines the Employee Assignment information.

The following information is available when you view defined Timekeeper Groups:

- Employee Name

- Employee Number

- The timecard period as of the current date

  > **Note:** The timecard period will help you create your Timekeeper Groups, as suggested above.

Creating and Maintaining Timekeeper Groups

Timekeepers enter time for a large group of workers, called a *Timekeeper Group.* You create Timekeeper Groups containing employees for whom the Timekeeper is responsible. A Timekeeper can have multiple groups.

Timekeepers and Super Timekeepers can define Timekeeper Groups. Limited Timekeepers cannot.

You define a group in the Timekeeper Group window.

To define a Timekeeper Group:

1. Enter a name for the group you are defining.

   > **Note:** Use a name that is meaningful to you, and describes the recurring time period for the group, such as Group_A_Weekly.

2. If you are a Super Timekeeper, enter the name of the Timekeeper for whom you are defining a group.

   > **Note:** If you are a regular Timekeeper, your name displays in the Timekeeper field, and you cannot change it.

3. In the Populate Employee regions, select a value from the Add list of values. Your choices are Assignment Set or Organization.

> **Note:** You can only use static Assignment Sets. You cannot use Dynamic Assignment Sets.

When you select a criterion from the Add list of values, the values display in the next list; select the item of interest to you, and then Select Go to populate the Employees region.

> **Note:** A worker will be included in the organization that contains his primary assignment.

4. Optionally, you can select members of the group and remove them from the group you define, using the Delete item from the Edit menu.

5. You can add another assignment set or organization; or you can enter individual workers one-by-one in the lines in the Employee region.

> **Note:** A worker can only be in your group once. OTL will identify multiple occurrences of a worker in a group when you try to save your work.

6. Save your work.

Using Mass Edits on Timecards

Mass Edit Overview

The Mass Edit feature allows Timekeepers to perform the same edit on all the timecards they *select* from their Timekeeper Group in the Timekeeper Entry window.

The edits that a Timekeeper can make include:

- Add a New Line to a Timecard

  If you select this option, then the Add line fields display.

  This Mass Edit allows you to add the values you enter in the Add line to the selected timecard(s).

  Wildcards are not appropriate for this Mass Edit Type.

  See Example:Adding a Line to a Timecard, page 13-17

- Delete a Line from a Timecard

  If you select this option, then the Delete line fields display.

  If the system finds a time entry line that matches the criteria, it deletes the line from the timecard.

  You can choose to use wildcards for pattern matching, or exact values when you use this Mass Edit type.

  See Example:Deleting a Line from a Timecard, page 13-19

- Find and Add a New Line

  If you select this option, then the Find line and Add line display.

  The system performs a search on the information you enter in the Find line. If it finds a match, then the system adds a new line to the timecard with values you enter in the Add line.

  You can use this Mass Edit with the wildcard for pattern matching.

  See Example:Find and Add a Line to a Timecard, page 13-21

- Find and Replace a Line

  If you select this option, then the Find line and Replace line display. The system performs a search, and if the pattern is matched, replaces the Find line with the Replace line.

  You can use this Mass Edit with the wildcard. The wildcard preserves the value and will include it in the newly added line, as long as there is not a value in the same spot.

  See Example:Find and Replace a Timecard Line, page 13-25

Using Wildcards in Mass Edits of Timecards

Overview of Wildcard Edits

The concept of *pattern matching* is important to understand when using Mass Edits with wildcards. Pattern matching is the process the system uses to identify the time entries that the Timekeeper wants to change. For instance, if Timekeepers want to change all Tuesday entries of 4 hours to be entries of 8 hours, then the *pattern* the system look for is Tuesday 4 hours. What might be on Wednesday or Monday is not of interest.

Wildcards are important in pattern matching because they allow Timekeepers to quickly include Monday and Wednesday values (for example) in the pattern match, without having to enter exact values for all the criteria in the Old line.

However, OTL wildcards have certain behaviors that are significant depending on the type of Mass Edit performed. For instance, a Mass Edit: Find and Replace assumes that you want to replace the entire row. By using the wildcard, you preserve a value so that it appears on what is essentially a new row.

The "%" wildcard is useful when you want to match a pattern. This wildcard is unique because it will preserve any value it finds even when the Mass Edit type is any form of change. You can use the wildcard on any measure in the timecard row.

Performing Mass Edits

Add a New Line to a Timecard:

This Mass Edit adds a new line to all the timecards you select. This Mass Edit does not require a wildcard to perform.

To perform mass edit: Add a Line

1. Having previously selected the timecards to be edited, select the edit type Add a New Line to a Timecard to perform on the group from the Mass Edit Type list of values.

2. Enter the information you want to add to the existing timecards in the New line and click Apply.

Delete a Line From a Timecard:

This Mass Edit performs a pattern match, and if the system finds the pattern, then it deletes the line from the timecard. You can use the wildcard to perform a pattern match in this Mass Edit type.

To perform a mass edit: Delete a Line

1. Having previously selected the timecards to be edited, select the edit type Delete a Line From a Timecard to perform on the group from the Mass Edit Type list of values.

2. Select the information you want to delete from the existing timecards using the list of values in the Delete line and click Apply.

Find and Add a Line to a Timecard:

The system assumes you want to add a New line to a set of timecards that contain an existing line. In other words, you use the existence of the data in the Find line to be the criteria for adding a new line. Nothing changes in the Find line.

Several operations take place: the system performs a pattern match, and if found it then appends a new line to the timecard. The Find line is preserved. In this Mass Edit, you can use the wildcard to help with the pattern match.

To perform mass edit: Find and Add

1. Having previously selected the timecards to be edited, select the edit type Find and Add a Line to a Timecard to perform on the group from the Mass Edit Type list of values.

2. Enter the information you want to find in the Find line.

3. Enter the information you want to add in the Add line, and click Apply.

Find and Replace Timecard Line:

When you use Find and Replace, the system is looking for a given pattern and replaces it with new data. The wildcard is useful for pattern matching, and it will preserve the value if the same location is left blank on the Replace line.

1. Having previously selected the timecards to be edited, select the edit type Find and Replace Timecard Line to perform on the group from the Mass Edit Type list of values.

2. Enter the information you want to find in the Find line.

3. Enter the information you want to change in the Replace line, and click Apply.

Example: Adding a New Line to a Timecard

Adding a New Line to a Timecard

When you select this option, the system adds a new line to all the timecards that you selected from the Timekeeper window.

Adding a new row is a simple mass edit. In essence you select a set of timecards in the Timekeeper Window and you perform the same edit on all the cards, that is, you add an additional row of information to each member of the set.

The following tables depict what happens.

Employee	Project	Day 1	In	Out	Day 2	In	Out
EE1	P1	3				0300	0300
EE1	P2	3			3		
EE2	P1	4				0400	0400
EE2	P2		0400		4		
EE3	P1	5				0500	0500
EE3	P2		0500		5		

The new information being added to the selected timecards:

	Project	Day1	In	Out	Day2	In	Out
NEW	P1		0400	0500	6		

The timecards now show the following results:

Employee	Project	Day 1	In	Out	Day 2	In	Out
EE1	P1	3				0300	0300
EE1	P2	3			3		
EE1	P1		0400	0500	6		
EE2	P1	4				0400	0400
EE2	P2		0400		4		
EE2	P1		0400	0500	6		
EE3	P1	5				0500	0500
EE3	P2		0500		5		
EE3	P1		0400	0500	6		

In the timecard above, a new row now exists for the Employee EE1, with the data shown in the NEW row.

Example: Delete a Line from a Timecard

Delete a Line from a Timecard

When you select this option, the system deletes a given line from all the timecards that you selected from the Timekeeper window.

Deleting a row is a simple mass edit. In essence you select a set of timecards in the Timekeeper Window and you perform the same edit on all the cards, that is, the system looks for the information to delete from the set you created in the Timekeeper window.

Note the use of the wildcard. Because this Mass Edit deletes the row, you can enter the exact values or you can use the wildcard. As long as the pattern matches, the system deletes the row.

The following tables depict what happens.

Employee	Project	Day 1	In	Out	Day 2	In	Out
EE1	P1	3				0300	0300
EE1	P2	3			3		
EE2	P1	4				0400	0400
EE2	P2		0400		4		
EE3	P1	5				0500	0500
EE3	P2		0500		5		

The following is the information to be deleted from the timecards, if found:

	Project	Day 1	In	Out	Day2	In	Out
OLD	P1	3	%	%	%	%	%

The timecards now show the following results:

Employee	Project	Day 1	In	Out	Day 2	In	Out
EE1	P2	3			3		
EE2	P1	4				0400	0400
EE2	P2		0400		4		
EE3	P1	5				0500	0500
EE3	P2		0500		5		

The system found the entry that matched the OLD pattern, and replaced the values with null. In essence, this mass edit deleted the entry from the timecard; the system interprets a line with null values as being an empty line, in effect deleting the line

Example: Find and Add A Line to a Timecard

Find and Add a Line to a Timecard

When you select this Mass Edit option, the system searches for the pattern to match; if the system finds the pattern, then it updates the information in the timecard by adding a new line.

> **Caution:** This Mass Edit is complex, and requires that you understand the usage of OTL Wildcards. You need to ensure that you understand how to use the wildcards, because you can inadvertently change time data for all the employees in the set you select.

Note the use of the wildcard, the percent sign ("%").

Example 1

The following tables depict what happens to your existing timecards.

Employee	Project	Day 1	In	Out	Day 2	In	Out
EE1	P1	3	0100			0300	0300
EE1	P2	3			3		
EE2	P1	4				0400	0400
EE2	P2		0400		4		
EE3	P1	5				0500	0500
EE3	P2		0500		5		

The system looks for a pattern to match, and if found, then it adds a new row to the timecard with the values shown in the NEW fields.

	Project	Day 1	In	Out	Day2	In	Out
Find	P1	3	%	%	%	0300	%
Add	P5	5				0500	

The timecards now show the following results:

Employee	Project	Day 1	In	Out	Day 2	In	Out
EE1	P1	3	0100			0300	0300
EE1	P5	5				0500	
EE1	P2	3			3		
EE2	P1	4				0400	0400
EE2	P2		0400		4		
EE3	P1	5				0500	0500
EE3	P2		0500		5		

Because this Mass Edit function is an add function, the system assumes that the values in the Add line will take precedence over the values in the Find line; however, there must be a value in the Add line: a null value in the Add line will not overwrite a value being preserved through the use of the % wildcard. If you want to replace a value from the Find line with an empty cell in the timecard, put a "0" in the Add line.

The important thing to note is the behavior of the wildcard and how the type of Mass Edit influences the end result:

• The new value of 5 hours overwrite the Day 1 value of 3 hours

• The Day 1 In % wildcard instructs the system to preserve any values from the Find line. The Day 1 In had a value of 0100 was preserved.

• The Day 1 Out wildcard instructs the system to preserve any values from the Find line. In this case, because it had a null value, there was nothing to preserve.

• The Day 2 % wildcard instructs the system to preserve any values from the Find line. Because Day 2 has a null value, there is nothing to preserve.

• The Day 2 In The value of 0500 is inserted from the Add line. If you had used the wildcard, it would still insert 0500 as the Add line takes priority over the Find line.

• The Day 2 Out % wildcard instructs the system to preserve any values from the Find line. The value of 0300 is preserved.

Example 2

In this example, the changes made reflect the entire line of information, including the Project code.

The following tables depict what happens to your existing timecards.

Employee	Project	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8
EE1	P1	1	2	3	4	5	6		
EE1	P2	1	2	3	4	5	6		
EE2	P1	2	3	4	5				
EE2	P2	2	3	4	5				
EE3	P1	3	4	5	6				
EE3	P2	3	4	5	6				

The following is the information to be changed from the timecards, if found, and new information appended in a new row:

	Project	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8
Find	P1	%	%	%	4	%	%	%	%
Add	P2		9			55	66		

The timecards now show the following results:

Employee	Project	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8
EE1	P1	1	2	3	4	5	6		
EE1	P2		9			55	66		
EE1	P2	1	2	3	4	5	6		
EE2	P1	2	3	4	5				
EE2	P2	2	3	4	5				
EE3	P1	3	4	5	6				
EE3	P2	3	4	5	6				

This Mass Edit did not change the Find line, but inserted the Add line.

The wildcards in this Mass Edit are purely for pattern matching:

- Notice how this Mass Edit ignored the Find Line and added a new Line to the timecard.

- The Day 1 value remained the same.

- The Day 2 value remained the same, and a value of 9 was added to the new Project code line.

- The Day 3 value of 3 remained the same.

- The Day 4 value remained the same.

- The Day 5 value remained the same, and a value of 55 was added to the new Project code. line

- The Day 6 value remained the same, and a value of 66 was added to the new Project code line.

Example: Find and Replace a Timecard Line

Find and Replace a Timecard Line

When you select this Mass Edit option, the system searches for the pattern to match; if the system matches the pattern, then it replaces the information in the timecard.

> **Caution:** This Mass Edit is complex, and requires that you understand the usage of OTL Wildcards. You need to ensure that you understand how to use the wildcards, because you can inadvertently change time data for all the employees in the set you select.

Note that the use of the wildcard, the percent sign ("%").

The following tables depict what happens to your existing timecards.

EE1	P1	3	0100			0300	0300
EE1	P2	3			3		
EE2	P1	4				0400	0400
EE2	P2		0400		4		
EE3	P1	5				0500	0500
EE3	P2		0500		5		

The system looks for a pattern to match, and if found, then it then replaces the information in the timecard with the values shown in the Replace line fields.

	Project	Day 1	In	Out	Day2	In	Out
Find	P1	3	%	%	%	0300	%
Replace	P1	5				0500	

The timecards now show the following results:

Employee	Project	Day 1	In	Out	Day 2	In	Out
EE1	P1	5	0100			0500	0300
EE1	P2	3			3		
EE2	P1	4				0400	0400
EE2	P2		0400		4		
EE3	P1	5				0500	0500
EE3	P2		0500		5		

Because this Mass Edit function is an replace function, the system assumes that the values in the Replace line will take precedence over the values in the Find line; however, there must be a value in the Replace line: a null value in the Replace line will not overwrite a value being preserved through the use of the % wildcard. If you want to replace a value from the Find line with an empty cell in the timecard, put a "0" in the Replace line.

The important thing to note is the behavior of the wildcard and how the type of Mass Edit influences the end result:

• The Day 1 value of 3 hours in the Find line is overwritten by the new value of 5 hours.

• The Day 1 In % wildcard instructs the system to preserve any values from the Find line. In this case, because Day 1 In had a value of 0100 it was preserved.

• The Day 1 Out wildcard instructs the system to preserve any values from the Find line. In this case, because it had a null value, there was nothing to preserve.

• The Day 2 % wildcard instructs the system to preserve any values from the Find line. Because Day 2 has a null value, there is nothing to preserve.

• The Day 2 In The value of 0500 is inserted from the Replace line. If you had used the wildcard, it would still insert 0500 as the Replace line takes priority over the Find line.

• The Day 2 Out % wildcard instructs the system to preserve any values from the Find line. The value of 0300 is preserved.

A

Windows and Their Navigation Paths

The following list shows the default navigation paths for all the windows in Oracle Time & Labor, as they are supplied.

The responsibility that you use determines which of these windows you can use an how you access them. You system administrator sets up navigation menus for your responsibility.

Alternate Names Definition

1. Choose Alternate Names -> Alternate Name Definitions in the Navigator

Alternate Name Mapping

1. Choose Alternate Names > Alternate Name Mapping in the Navigator

Application Sets

1. Choose Application Sets in the Navigator

Approval Periods

1. Choose Approval -> Define Approval Periods in the Navigator

Approval Styles

1. Choose Approval -> Define Approval Styles in the Navigator.

Assignment Time Information

1. Choose OTL Time Accounting -> Assignment Time Information in the Navigator

Deposit Process

1. Choose Deposit/Retrieval Processes -> Define Process in the Navigator

Earning Policy

1. Choose OTL Time Accounting -> Policies -> Earning in the Navigator

Earning Group

1. Choose OTL Time Accounting -> Table Setup and Maintenance -> Earning Group in the Navigator.

Element Time Information

1. Choose OTL Time Accounting -> Element Time Information in the Navigator

Entry Level Processing Rule Group

1. Choose Time Entry Rules -> Define Entry Level Processing Rule Groups in the Navigator

Holiday Calendar

1. Choose OTL Time Accounting -> Table Setup and Maintenance -> Holiday Calendar in the Navigator.

Hour Deduction

1. Choose OTL Time Accounting -> Policies -> Hour Deduction in the Navigator

Mapping

1. Choose Deposit/Retrieval Processes -> Define Mappings in the Navigator.

Mapping Components

1. Choose Deposit/Retrieval Processes -> Define Mapping Components in the Navigator

Preferences

1. Choose Preferences in the Navigator

Premium Eligibility

1. Choose OTL Time Accounting -> Policies -> Premium Eligibility in the Navigator

Premium Interaction

1. Choose OTL TIme Accounting -> Policies -> Premium Interaction in the Navigator.

Project Accounting

1. Choose OTL Time Accounting -> Table Setup and Maintenance -> Project Accounting in the Navigator.

Recurring Periods

1. Choose Recurring Periods in the Navigator

Retrieval Process

1. Choose Deposit/Retrieval Processes -> Define Process in the Navigator

Retrieval Rule Groups

1. Choose Deposit/Retrieval Processes -> Define Retrieval Rule Groups in the Navigator.

Retrieval Rules

1. Choose Deposit/Retrieval Processes -> Define Retrieval Rules in the Navigator.

Rotation Plan

1. Choose OTL TIme Accounting -> Table Setup and Maintenance -> Rotation Plan in the Navigator.

Shift

1. Choose OTL Time Accounting -> Table Setup and Maintenance -> Shift in the Navigator.

Shift Differential

1. Choose OTL Time Accounting -> Policies -> Shift Differential in the Navigator.

Submit a New Request

1. 1. Choose Processes and Reports -> Submit Requests in the Navigator.

   2. Select Single Request or a Request Set.

Time Categories

1. Choose Time Categories in the Navigator

Time Entry Rules

1. Choose Time Entry Rules -> Define Time Entry Rules in the Navigator.

Time Entry Rule Groups

1. Choose Time Entry Rules -> Define Time Entry Rule Groups in the Navigator.

Variance

1. Choose OTL Time Accounting -> Table Setup and Maintenance -> Variance in the Navigator.

Work Plan

1. Choose OTL Time Accounting -> Table Setup and Maintenance -> Work Plan in the Navigator.

B

Integration Notes

Migrating from Personal Time and Expense, Project Time and Expense, and Oracle Internet Time

This section describes the steps involved in migrating historical Personal Time and Expense (PTE), Project Time and Expense (ProjTE), and Oracle Internet Time (SST) timecard date Oracle Time & Labor.

To migrate existing timecard data to Oracle Time & Labor (OTL), a SQL script provided with OTL should be run as described below. All timecards entered via one of the existing applications mentioned, must be submitted and approved before they are eligible for migration.

During the migration to OTL, the system will prompt you to input parameter values that specify the historical data migrate. All of the selected online timecards (created from one of the applications mentioned) will be migrated to Oracle Time & Labor. After migration, these timecards will be visible from Oracle Time & Labor as historical records.

Parameters

The migration script contain parameters you can use to select the transactions to migrate from ProjTE/PTE/Oracle Internet Time to Oracle Time & Labor. The parameters include:

- Operating Unit ID (organization ID of the operating unit)
- Incurred by Person Number (Employee Number)
- Incurred by Organization Name
- ONLINE_SST_OR_BOTH (1=PTE and OTE, 2+SST, 3=ALL)
- Starting Expenditure Date (format DD/MM/YYYY)
- Ending Expenditure Date (format DD/MM/YYYY)

The following parameters are required:

- Operating Unit ID (for multiple organization installations)
- Incurred by Person Number or incurred by Organization Name
- ONLINE_SST_OR_BOTH

All other parameters are optional.

To Migrate Timecard data to Oracle Time & Labor:

1. Log on to your server

2. Change your directory to:

   $PA_TOP/patch/115/sql

3. Run the following migration script:

   $ sqlplus <apps username>/<apps password> @ paxtmotl.sql
   <operating Unit ID> <Incurred by Person Number> <Incurred by
   Organization Name> <1 = PTE and OTE; 2 = SST; 3 = ALL> <Starting
   Expenditure Ending Date> <Ending Expenditure Ending Date>

4. An Example: the following command migrates Oracle Internet Time (SST) timecards
   for the operating Unit ID 458, incurred by person number 205, for week ending dates
   from 12-Dec-1999 through 21-Jan-2001, inclusive:

   $ sqlplus <apps username>/<apps password> @ paxtmotl.sql 458 205
   NULL 2 12.01/1999 21/01/2001

   > **Note:** The expenditure item comments will be truncated to 150
   > characters during the migration.

Oracle Projects Integration Notes

You can customize the Projects Timecard Layout in Oracle Time & Labor by:

- Controlling Access to Oracle Projects data: page B-4

- Using Oracle Projects Client Extensions: page B-6

Determining List of Values for Oracle Projects Data

You can configure List of Values for Project, Task, Type, and Overriding Approvers to
meet your requirements. To do this, modify the WHERE clause in the corresponding
view listed in this section.

Views are associated with the timecard preparer (that is, the person logged into the
system). Because these views are used for validation and display, be sure to set up the
view so that the timecard preparer can select the projects for which he is entering hours.

You can customize the following views:

- Projects View

- Task View

- Expenditure Type View

- Overriding Approver View

Projects View

View and Internal Name	Filename of Scripts* and Notes
Project View PA_ONLINE_PROJECTS_V	pavw681.sql* Default allows user to view all projects. Sample code specifies that projects selected must be within the user's organization. Do not modify the base view PA_PROJECTS_EXPEND_V

*Scripts are located in the $PA_TOP/patch/115/sql directory. See: Notes on Terminology and File Locations: page B-6.

By default, the user can view all projects when selecting the Project LOV. In large implementations, this list may be very long, and by customizing this view the values returned by the Project LOV can be reduced to those applicable to the business processes implemented in your enterprise and to the preparer of the timecard.

For example, some implementations may have thousands of projects, but many workers will only be working on a few. By customizing the view, the list of projects displayed is restricted to only those that are valid for the user.

Task View

View and Internal Name	Filename of Scripts* and Notes
Task View PA_ONLINE_TASKS_V	pavw682.sql* Default allows user to view all tasks. Sample code specifies that tasks selected must be within the user's organization. Do not modify the base view PA_TASKS_EXPEND_V

* Scripts are located in teh $PA_TOP/patch/115/sql directory. See Notes on Terminology and File Locations: page B-6

By default, the user can view all tasks when selecting the Task LOV. In large implementations, this list may be very long, and by customizing this view the values returned by the Task LOV is reduced to those applicable to the preparer of the timecard.

For example, some tasks in the work breakdown structure of a project may not be chargeable. The view may be customized to return only those tasks that are chargeable.

Expenditure Type View

View and Internal Name	Filename of Scripts* and Notes
Expenditure Type View	pavw742.sql
	Default allows user to view all expenditure types.
	Sample code specifies that users in the Consulting organization (organization_id=1) can enter only transactions of type Straight Time.
	Do not modify the base view
	PA_ONLINE_EXPENDITURE_TYPES_V

* Scripts are located in teh $PA_TOP/patch/115/sql directory. See: Notes on Terminology and File Locations: page B-6.

By default, the user can view all expenditure types when selecting the type LOV. In some situations it may be desirable to restrict this list.

For example, you may not want all users to have access to all expenditure types. By customizing the Expenditure Type View, the Type LOV can return only those expenditure types appropriate for the timecard preparer.

Overriding Approver View

View and Internal Name	Filename of Scripts* and Notes
Overriding Approver View	pavw685.sql *
PA_EXP_OVRRDE_APPROVER_V	Default allows user to view all supervisors in the preparer's business group.
	Sample code specifies that users can only select overriding approvers who belong to the user's organization..

* Scripts are located in the $PA_TOP/patch/115/sql directory. See Notes on Terminology and File Locations: page B-6

The Overriding Approver view allows user to view all supervisors in the preparer's business group. By customizing this view, the values returned in the Overriding Approver LOV can be tailored to return only those approvers applicable to the business processes implemented in your company and the users entering their time.

Notes on Terminology and File Locations

- **Terminology:** In the 11i version of Oracle Projects, the *overriding approver* is called the *approver.*

- **File locations:** Print and review the files before modifying an extension. The files are located in the following Oracle Projects directory: $PA_TOP/patch/115/sql

Using Oracle Projects Client Extensions

You can modify the following client extensions to route and approve timecards according to your requirements and to enforce any custom business rules. Client extensions are PL/SQL procedures that Oracle Projects uses when processing timecards. For more information, see: Client Extensions in the *Oracle Projects User Guide.*

You can use the following client extensions with Oracle Time & Labor:

Extension and Reference	Package Body and Package Specification Files	Package and Procedure
Approval: page B-10	PAXTRT1B.pls PAXTRT1S.pls	PA_CLIENT_EXTN_RTE check_approval
AutoApproval: page B-7	PAXPTEEB.pls PAXPTEES.pls	PA_CLIENT_EXTN_PTE get_exp_autoapproval
Business Message Display: page: B-11	PAPSSTCB.pls PAPSSTCS.pls	PA_TIME_CLIENT_EXTN display_business_message
Routing: page B-9	PAXTRTEB.pls PAXTRTES.pls	PAROUTINGX route_to_extension
Summary Level Validation: page B-7	PAXTGTCB.pls PAXTGTCS.pls	PAGTCX Summary_validation_extension
Transaction Control: page B-7	PAXTTCXB.pls PAXTTCXS.pls	PATCX tc_extension

Oracle Projects Client Extensions

The following Oracle Projects client extensions are used by Oracle Time & Labor:

AutoApproval Extension

The default for this extension returns the value of the profile option PA:AutoApprove Timecard. You can configure this extension to meet your needs. For example, you may want timecards to be approved automatically unless they contain overtime. Those with overtime must be routed to the employee's supervisor.

Transaction Control Extension

Timecard line level validation via Transaction Control extensions allow you to define your own rules to implement company-specific time entry policies for individual time entries.

For more information, see the *Oracle Projects User Guide*

Summary-Level Validation Extension

Use the summary - level validation extension to check the validity of one or more items in a submitted expenditure. For example, you could automatically reject any timecard that contains more (or less) than 40 hours.

The extension includes the following items:

Item	Name
Body template	PAXTGTCB.pls
Specification template	PAXTGTCS.pls
Package	PAGTCX
Procedure	summary_validation_extension

Print and review the files before writing the extension. See: Notes on Terminology and File Locations: page B-6

Summary Validation Procedure

The extension uses the following parameters:

Parameter	Usage	Type	Description
X_expenditure_id	IN	NUMBER	Identifies the expenditure
X_incurred_by_ person_id	IN	NUMBER	Identifies the employee that submitted the expenditure
X_expenditure_end_ date	IN	DATE	Ending date of the expenditure period
X_exp_class_code	IN	VARCHAR2	Identifies the expenditure class (OT for timecards)
X_status	OUT	VARCHAR2	Denotes the status of the expenditure (AP PROVED or REJECTED). See ABout the status PArameter: page B-8
X_comment	OUT	VARCHAR2	Comment to be passed back to the employee who submitted the expenditure. Stored as an expenditure routing comment
P_Timecard_Table	IN	PL/SQL Table	PL/SQL table holding the expenditure item information for the timecard. Only populated when P_ Module = OTL
P_Module	IN	VARCHAR2	Name of source product calling the routine

About the status parameter

Use the **Status** parameter (X_status) to handle error conditions for your procedure. This parameter indicates the processing status of your extension.

x_status = 0 The extension executed successfully

x_status < 0 An Oracle8 error occurred

x_status > 0 An application error occurred. Your extension must return an error messag code.

Routing Extension

Use the routing extension to set the business rules for routing timecards for approval. For example, timecards that contain overtime could be routed to the project manager of the charged project. By default, this extension returns the immediate supervisor of the employee who created the timecard.

The extension includes the following items:

Item	Name
Body template	PAXTRTEB.pls
Specification template	PAXTRTES.pls
Package	PAROUTINGX
Procedure	route_to_extension

Print and review the files before writing the extension. See: Notes on Terminology and File Locations: page B-6.

Route to Procedure

The extension uses the following parameters:

Parameter	Usage	Type	Description
X_expenditure_id	IN	NUMBER	System-generated identifier of the expenditure
X_incurred_by_ person_id	IN	NUMBER	Identifies the employee who performed the work
X_expenditure_end_ date	IN	DATE	Ending date of the expenditure week
X_exp_class_code	IN	VARCHAR2	Identifies the expenditure type (OT for timecards)
X_previous_ approver_person_id	IN	NUMBER	Employee to whom the timecard was previously routed
X_routed_to_person_ id	OUT	NUMBER	Identifies the employee to whom expenditure is to be routed
P_Timecard_Table	IN	PL/SQL Table	PL/SQL table holding the expenditure item information for the timecard. Only populated when P_Module = OTL
P_Module	IN	VARCHAR2	Name of source product calling the routine

Approval Extension

This extension determines if additional approval is required for the timecard. By default, there is no restriction on approval.

The extension includes the following items:

Item	Name
Body template	PAXTRT1B.pls
Specifies template	PAXTRT1S.pls
Package	PA_CLIENT_EXTN_RTE
Procedure	check_approval

Print and review the files before writing the extension. See: Location of Client Extension Files: page B-6.

Check Approval Procedure

The extension uses the following parameters:

Parameter	Usage	Type	Description
X_expenditure_id	IN	NUMBER	System Generated identifier of the expenditure
X_incurred_by_ person_id	IN	NUMBER	Identifies the employee who performed the work
X_expenditure_end_ date	IN	DATE	Ending date of the expenditure week
X_exp_class_code	IN	VARCHAR2	Identifies the expenditure type (OT for timecards)
X_amount	IN	NUMBER	Amount of expenditure in hours
X_approver_id	IN	NUMBER	Application user ID of employee attempting to approve the expenditure
X_routed_to_mode	IN	NUMBER	Responsibility of approving employee (either SUPERVISOR or ALL). See: About the routed_to_mode Parameter: page B-11
X_status	OUT	VARCHAR2	Status of procedure. See: About the status Parameter: page B-8
X_application_id	OUT	NUMBER	Short name of application defined in AOL. (PA for Oracle Projects)
X_message_code	OUT	VARCHAR2	Message code
X_token_1-5	OUT	VARCHAR2	Message tokens passed back to be used in message
P_Timecard_Table	IN	PL/SQL Table	PL/SQL table holding the expenditure item information for the timecard. Only populated when P_Module = OTL
P_Module	IN	VARCHAR2	Name of source product calling the routine

About the routed_to_mode Parameter

Depending on the navigation path, the routed_to_mode parameter contains the value SUPERVISOR (Review and Approve) or ALL (Review and Approve ALL).

You can use this parameter to allow the approver to circumvent the rules enforced by the approval extension. For examaple, you might want to use this parameter for a supervisor who needs to approve hours regardless of any special logic in your extension.

Business Message Display Extension

The billable percentage is calculation of the percentage of the hours in a timecard that are marked as billable. This extension contains an example that returns a message displaying the billable percentage for the timecard (the example is preceded by the comment character). If this example meets your requirements, remove the comment characters from the example code after enabling the profile. This displays the billable percentage message in Oracle Time & Labor.

> **Important:** The example code does not return a message. You must set the profile option PA:Enable Business Message to Yes to see your custom business message as defined in the Business Message Display extension.

The extension includes the following items:

Item	Name
Body template	PAPSSTCB.pls
Specification template	PAPSSTCS.pls
Package	PA_TIME_CLIENT_EXTN
Procedure	display_business_message

Print and review the files before writing the extension. See: Notes on Terminology and File Location: page B-6.

Business Message Display Procedure

This package contains default logic to return a blank message.

The extension uses the following parameters:

P_Expenditure_Id	IN	Number	System-generated number that uniquely identifies the expenditure
P_person_id	IN	NUMBER	Identifier of the person entering timecard information
P_week_ending_date	IN	DATE	Period for which time is being entered
X_message_ application_name	OUT	VARCHAR2	Short name of the application that "owns" the message
X_mesg_name	OUT	VARCHAR2	Message Name
X_msg_token1_name	OUT	VARCHAR2	Name for Token1
X_msg_token1-Value	OUT	VARCHAR2	Token for message
X_msg_Token2_name	OUT	VARCHAR2	Name for Token2
X_msg_Token2_value	OUT	VARCHAR2	Token for message
X_msg_Token3_name	OUT	VARCHAR2	Name for token3
X_msg_token3_value	OUT	VARCHAR2	Token for message
X_return_status	OUT	VARCHAR2	Indicates the status of the procedure. Possible values include NULL, (Success), U, (Unexpected Error), or E, (Expected Error).
X_message_data	OUT	VARCHAR2	Contains the error message is Return_status is U, or E. Is Null if return_status = Null
P_timecard_table	IN	PL/SQL Table	PL/SQL table holding the expenditure item information for the timecard. Only populated when P_module = OTL
P_module	IN	VARCHAR2	Name of source product calling the routine

Enterprise Asset Management Preferences in Oracle Time & Labor

Preferences allow you to assign rules and options to your workers. It also lists the values that are predefined as default preferences. You can override the defaults by creating new preferences hierarchies.

In the Preferences window, you can see the Default Preferences by expanding the Preference Tree node.

The following table shows the preference values when using the nodes Default Preferences and Default Preferences - EAM.

Self-Service

The Self Service node contains the predefined preferences of Worker. The Worker preferences relate to functionality directly associated to an individual.

Preference Name in Tree (Preference Name)	Description	Value in Default Preferences Hierarchy
Append Templates on Timecard (self Service functionality to append templates on the timecard)	Y/N. If set to Yes, then the worker can select more than one template and the data from all the selected templates appears on the timecard.	No
Business Messages (Self Service ability to show a business message)	Y/N. If set to Yes, then business messages from time entry rule validation display to the worker on the timecard	Yes
Create Personal Templates (Self Service create template functionality)	Y/N. If set to Yes, then workers can create their own personal timecard templates. A Create Template button displays on the Template page.	No
Date Formats (Self Service date format functionality	Determines the display of date formats for the timecard. You can choose the date format for the Period List, Timecard Table Day Header, and Timecard Details Page Day Header.	December 31, 2002.Tue, Dec 31.Tuesday, December 31, 2002
Default Approver (Worker Default Approver)	If the *Enter Override Approver* preference is set to Yes, then you can select any supervisor in the business group to be the default value in the Override Approver field.	[None]
Disconnected Entry (Self Service disconnected entry option for worker)	Import, Import/Export, or None. Determines whether workers can enter time and labor data using a spreadsheet (import) and whether they can download data to the spreadsheet (export).	[None]
Enter Negative Hours (Self Service ability to enter negative hours)	Y/N. If set to Yes, then workers can enter negative hours on their timecard.	No

Enter Override Approver (Worker Preference to enter an overriding Approver)	Y/N. If set to Yes, workers can enter an override approver on the timecard. **Note:**You must also set the Override Approval Style segment of the Approval Style preference to Projects Override Approver.	No
Number of Empty Rows on the Timecard (self Service number of empty rows on the timecard)	Determines the number of empty rows to display on the worker's default timecard.	1
Number of Recent Timecards Displayed (Self Service number of recent timecards on Time Entry screen)	Determines the number of previously entered timecards to display.	5
OTL Rules Evaluation (Self Service preference to allow Rules Evaluation)	Y/N. Set the Evaluate OTL Rules segment to Yes for workers whose time is subject to OTL rules based on a rotation plan and earnings policy. If set to Yes, then use the Approval Rules for Rules Evaluation segment to select the applications that must approve the data before you can run the Transfer to BEE process. You may also select an Overtime Recurring Period to calculate overtime for non-weekly payrolls.	No
Save as Template on Timecard (Self Service save as template functionality on timecard)	Y/N. If set to Yes, the Save As A Template button displays on the worker's timecard.	No
Self Service Flow	Audit or Standard. If set to Audit, you would also use the Change and Late Audit Preference node. If set to Standard, you choose not to use Change and Late Audit.	[None]
Template Assigned Value - Administrator (Self Service Default Template assigned by Sys Admin)	Determines default template assigned by the system administrator.	[None]
Template Assigned Value - End User (Self Service Default Template Selected by User)	Determines default template selected by worker. Check the Editable by User check box if you want workers to be able to select their own default template.	[None]
Template Functionality (Self Service Template Functionality for a Worker)	Y/N. If set to Yes, then workers can use templates.	No

Timecard Alternate Names (Self Service timecard alternate name set defined for a user)	Determines the set of alternate names used to configure list of values on workers' timecards. You must define Timecard Alternate Names	[None]
Timecard Delete Allowed	Yes/No. If set to Yes, workers can delete timecards.	[None]
Timecard Layout (Self Service Timecard, review, and confirmation layout pages for a worker)	Determines which timecard layouts workers use for data entry, review, confirmation, detail page, and for export. If you leave the Export segment blank, then you use the Timecard entry layout for export.	EAM Timecard Layout, EAM Review Layout, and EAM Confirmation Layout.
Timecard Period (Self Service timecard Period for worker)	Determines which recurring time period workers use for timecard entry.	Weekly - Starts Sunday

Timecard Unit of Measure (Self Service Unit of Measure to be used on a timecard)	Determines the units in which workers enter time and labor data, such as days, hours, pieces, and time units as well as the format for entering time.	Hours HH:mm
timecard Status Allowing Edits (Self Service timecard status that allows user edits)	Determines which timecards can be edited, according to their status and their date. In the **Status Allowing Edits field,** select a status: New_Working_Rejected - Workers can only edit unsubmitted timecards, or those in a working or rejected status. Submitted - Workers can edit new, working, rejected and submitted timecards. Approval Initiated - Workers can edit new, working, rejected, and submitted timecard, plus those with an initiated approval process. Retro - Workers can edit all timecards, including submitted, approved, and processed. Adjustments made at this point create a Retro Time Adjustment. In the **Past Number of Days field** enter the age, in days, or the oldest timecard a worker can edit. Timecard for the period in which this day falls can be edited. In the **Future Number of Days field** enter how many days in advance a worker can enter a timecard. For example, if you enter 28, a worker can enter timecards for all periods up to and including the period that includes the 28th day. Note: A timecard can be edited if it has a status that allows edits AND it is for a timecard period that falls within the date limits set by this preference.	New, Working, Rejected Day fields are blank, meaning there is no time limits on entering and editing timecards.

Time Store

The time store hierarchy contains the preferences that relate to the functionality of the time store and applications.

Preference	Description	Default Value
Application Set (Time Store Application Set)	Determines which applications retrieve workers' timecards - you must define at least one application set.	Enterprise Asset Management.
EAM Approval Periods (Time Store Approval Periods)	Determines the approval time periods for each application.	Weekly Periods - Starts Sunday
EAM Approval Style (Time Store Approval Style)	Determines the approval rules and method for each application	OTL Auto Approve
Auditing Requirements (Time Store Audit Requirements)	Determines whether entries will be audited using Change and Late Audit. If Change and Late Audit is selected, you must enter your Change and Late Audit rules.	[None]
Entry Level Processing Rule Groups	Defines the entry level processing time entry rules to be used to validate the worker's timecard	[None]
Retrieval Rule Groups (Time Store Retrieval Rule Groups)	Determines the retrieval rules for each application's retrieval process. The retrieval rules define the approval status data must achieve before it can be retrieved. You must define a Retrieval Rule Group. Note: Ensure that a worker's retrieval rule group does not contain rules for applications that are not in the application set.	EAM Retrieval Rule Group
Timecard Required (Time Store Time Required for Worker)	Lists any applications that do not require a timecard	[No applications]
Time Entry Rule Groups (Time Store Time Entry Rules)	Defines the time entry rules to be used to validate the worker's timecards	[None]

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APIs in Oracle Time & Labor

APIs in Oracle Time & Labor

Application Programmatic Interfaces (APIs) are logical grouping of all external process routines. Oracle Time & Labor includes a set of PL/SQL packages, procedures and functions that provide an open interface to the database.

See: APIs in Oracle HRMS, *Implementing Oracle HRMS.*See also the *Oracle Applications System Administrator's Guide.*

The following table shows the publicly callable business process APIs delivered with Oracle Time & Labor.

Package Name	Filename	Business Process API Name	Pump Support	User Hooks
hxc_recurring_ periods_api	hxchrpapi.pkh	create_ recurring_ periods	No	Yes
hxc_recurring_ periods_api	hxchrpapi.pkh	delete_ recurring_ periods	No	Yes
hxc_recurring_ periods_api	hxchrpapi.pkh	update_ recurring_ periods	No	Yes
hxc_time_ recipient_api	hxchtrapi.pkh	create_time_ recipient	No	Yes
hxc_time_ recipient_api	hxchtrapi.pkh	delete_time_ recipient	No	Yes
hxc_time_ recipient_api	hxchtrapi.pkh	update_time_ recipient	No	Yes
hxc_time_ source_api	hxchtsapi.pkh	create_time_ source	No	Yes
hxc_time_ source_api	hxchtsapi.pkh	delete_time_ source	No	Yes
hxc_time_ source_api	hxchtsapi.pkh	update_time_ source	No	Yes